



FOOD & BEVERAGE

tfp

TRENDS

2025-2026



simple gourmet

Real food is back. The spotlight on ultra-processed foods (UPFs) has undoubtedly altered perceptions surrounding 'real' food, namely dairy, meat and fish. As such, consumers are willing to spend more on better quality; for brands, storytelling is key. The premise of simple gourmet is soul-centric food, buoyed by the digitalisation of comfort. Cheese, eggs and potatoes all have a common denominator: the innate ability to straddle categories, eating occasions, and retain multigenerational appeal. Value cuts of meat are treated with the same respect as prime cuts, while oily fish – particularly mackerel – gets a moment in the spotlight.

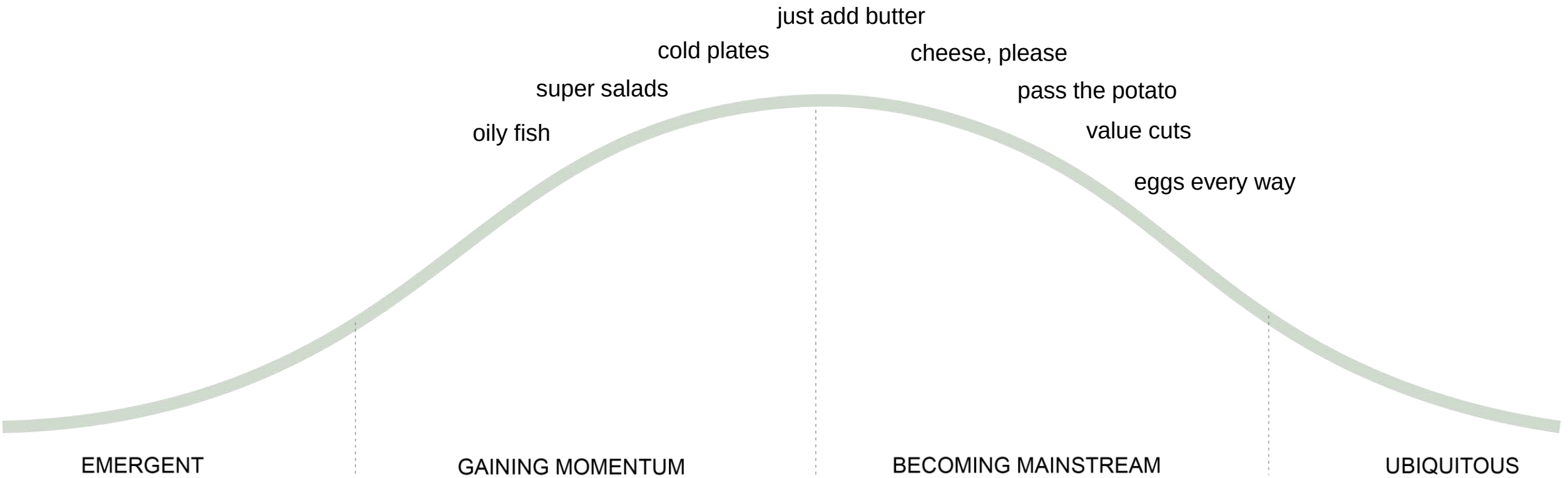
2-3
years

Lifespan

smart
spends

Trend Driver

SUB TRENDS: cheese, please, just add butter, eggs every way, pass the potato, value cuts, oily fish, super salads, cold plates



level of trend establishment

Simple gourmet: cheese, please

From whipped dips and cream cheese collabs, to gourmet spots championing local cheese, the mantra is real dairy, full fat & flavour.

UPF-fuelled single-ingredient snacking keeps aeration and freeze-drying in the health narrative, while the cyber crowd drives buzz with microwave brie rind crisps and cheese melt plates racking up millions of views. Speaking of viral appeal, cottage cheese is still on the radar for protein devotees (hello, cottage cheese wraps), as is the uber-popular whipped cheese. Of course, this isn't new – whipped ricotta, feta, goat's cheese and, more recently, brie have all had their moment of glory – but this inherently comforting, indulgently satiating take is back in the spotlight. Cuisine-forward additions and cheese experimentation help maintain relevance (cue homemade Boursin on a budget), while brands tap into the socially-fired trend for added-value convenience. Hummus, who? Dairy dip old-timers embrace the fun with voguish ingredients and storytelling - think French onion sour cream or fresh cheese queso – while eco efforts laser in on resealable packaging. This year's bagel buzz brought the subject of schmears centre stage giving spreadable cheese a much-needed sweet and savoury makeover. But cheese is more than spreads and snacks; whole burrata, queso bowls, and marinated hard cheese pose as centrepiece heroes for effortless entertaining. Moreover, the desire for speciality cheese is booming. Fondue Thursdays have evolved to cheese-centric cafes and patisserie-esque fromage counters, sought by those eager to get geeky on processes and nuances of terroir. A “fromelier” uprising, so to speak. One to watch? Japanese Hokkaido-style is afoot.

SNACKING || WHIPS & DIPS || CREAM CHEESE || CENTREPIECES



Brie for breakfast,
@alouettecheese
(US)



All-natural cheesy hot serves dip pots in Alpine Fondue, Nacho Cheese and Margarita flavours, ready to be heated and enjoyed in two minutes,
Holy Moly
(UK)



Six seasonally rotating artisan cheeses in a gifting box featuring a QR code providing further productions details, wine and chutney pairing recommendations,
Sainsbury's x Cheesegeek
(UK)



Haute cheese centrepiece for 6-8 people of Brillat-Savarin, truffled mascarpone, fresh black truffle and fresh edible flowers with each “painting” a unique creation,
Tableaux Paris
(Paris, France)

Simple gourmet: just add butter

Gourmet butter is booming both at home and on the shelf as cooks embrace the versatile fat and its miraculous effect on flavour.

The renewed appreciation for low-intervention butter is clearly impacting the retail landscape where the narrative of ‘good’ butter not only brings provenance and feed credentials into question, but also the process (aka single-batch or continuous churn) and additives used. But it’s the premiumisation through foodie cues that’s driving innovation. The latest #buttertok trend feels worlds apart from gimmicky butter boards and butter candles; yes, this is social media-driven, but with Chef Thomas Straker at the helm, the resurgence undoubtedly hits different with the culinary curious. A real love letter to this churned artefact. Naturally, copycat content creators have jumped on his flavoured All Things Butter trademark stemming a wave of foodie cooks around the globe getting to grips with butter alchemy – think hand-crafted cultured butter to compound and browned styles. Not to mention some insane sculpting contests at play... The usual suspects – we’re talking alliums, herbs, acid and heat – act as a paving stone for flavoured butter newbies, while big flavour hitters in the guise of umami and swavoury profiles keep eager palates entertained. That’s not to say it’s inaccessible; the beauty of simple gourmet is that comforting carby carriers are absolute prerequisites. Bread, potatoes, pasta, cakes. Quadruple check. Sweet butters are following the upward trajectory of sweet cream cheese: cue cinnamon bun, maple syrup and chocolate coming in fast. What’s more, fancy butter dishes are on the hot list - after all, why have posh butter without something posh to keep it in?

ARTISANAL || BROWNED || SWEET || SAVOURY || BUTTER KEEPERS



Chocolate butter,
All Things Butter
(UK)



A parmesan gruyere bagel and garlic butter escargot schmear of garlic cream cheese, crème fraîche, brown butter & herbs topped with parmesan crumbs and escargot,
Dominique Ansel x Popup Bagel
(US)



Tablesides preparation of lemon butter,
Haerlin
(Germany)



French butter keeper,
Gray Lane Ceramics
(Calgary, Canada)

Simple gourmet: eggs every way

Fried, folded, scrambled, boiled, drippy, poached, baked. Eggs are on the menu all day, every day - especially beyond breakfast.

The hyper-fixation with eggs continues, buoyed by its standing as a frugal-friendly source of quality protein. Naturally, the protagonist is a breakfast and brunch hero, but its versatility sees the humble egg being woven into every occasion. In fact, egg-devotee spots such as Eggholic – a Gujarat-focused chain in the US and Canada - don't serve breakfast at all. That's not to say morning eggs aren't still uber-popular – they are. Turkish çilbir rises the ranks (yoghurt base, double protein), while fried eggs, omelettes, and bennys get a global – often spicy, fermented and umami-driven - makeover. Think regional profiling in chilli butters and hot sauce, 'nduja whips, truffle creams and miso brown butter baths, plus all manner of pickled and fermented toppings for multi-dimensional flavour and texture. Equally, cheese and butter stand their ground in super simple, super satiating scrambles with the coveted spiral bringing gourmet cues. The viral devilled egg flights make for savvy snacking, while the resurgence in classical French cuisine brings oeufs mayo into the spotlight – both with obligatory global twists. Watch out for oeufs en meurette (a Burgundy dish of eggs poached in red wine) ready to take the reins for sweater weather. Egg salads continue to trend, cropping up in everything from smashed pea egg salad on toast to onigiri fillings. Finally, the ultra-aesthetic golden-hued centre adds confit, cured, smoked and marinated richness to carby comforts – aka toast, pasta, rice (try raw, TKG style) and noodles – as well as salads, veg, soups and stews. Nothing is off-limits for #yolkporn.

ALL DAY EGGS || OEUFS MAYO || EGG FLIGHTS || GOURMET YOLK



Eggiri: egg-shaped onigiri with floral rice filled with dill-laden 7.5minute jammy egg salad, @noholiving (Instagram, US)

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Bento eggs tasting menu featuring panzanella with hen bottarga, vitel tonnè, vegetable spaghetti with quail egg, carbonara with homemade tonnarelli, and a surprise from the chef, **Eggs** (Rome, Italy)



Devilled eggs on a custom snack plate: 6.5, 8 and 10-minute eggs with toppings including labneh, olive & za'atar, crushed jalapeño crisps, sour cream & paprika, @goobceramics (Instagram, US)



Shiok Shiok Salted Egg Chicken featuring coated chicken in a salted egg sauce, **Popeyes** (Singapore)

Simple gourmet: pass the potato

More than just a sustenance staple for savvy spenders, the humble spud is showing it can be gourmet – and the star of the show.

From the unassuming jacket potato seduced by TikTok fame (cue Spudman and Spud Bros with their ubiquitous baked beans and cheese) to the Irish spice bag - a craveable mix of crispy chicken, bell peppers, onions, chillies, seasoning and chips served in a paper bag that's gained a fanbase from London to LA (Lizzo, we're looking at you) - this budget-friendly fodder is undeniably versatile. A genre-shifting and cuisine-hopping native, the potato really is a blank canvas for ramping up its epicurean credentials. Where less is more, sustainable sourcing, heirloom varieties, and potato characteristics bring the chic. Even the once-inferior frozen category is getting a refresh of its chips. Think restaurant-quality cooked in tallow with sea salt, healthier, air-fryer-fuelled takes on Seoul's tornado fries, and even iced treats evocative of that swalty fries-into-milkshake guilty pleasure. Talking of pommes frites, this summer's "it girl" dinner - aka Caesar salad and French fries, often accompanied by a martini or Diet Coke - shifted the status quo on eating out on a budget, while at home, crisps seek upmarket refuge in wine pairing. Yes, Beef Hula Hoops with Shiraz is a thing. Mashed, smashed, and spuds on a stick are back with a vengeance and subject to fresh culinary exploration – think tornado, XXL, smashed tarts, potato sandwiches and Irish potato farl fries levelled up with seasonings on steroids - while hash browns enter into a whole new league: hashwiches, prawn toast, tacos, coatings...anything goes! Watch out for Wayback Burger's ketchup-filled fries set to shake up the segment.

JACKETS || SPICE BAGS || SMASHED || HASH BROWN || FROZEN



Dutch Cream potato
French fries with
mancho, EVOO, crispy
garlic and chives,
Opus Coffee Brewers
(NSW, AU)



Potato, onions and butter: potato
dumplings filled with onion confit
and roasted onions served with a
barley miso beurre blanc,
Pars
(Berlin, Germany)



The Spice Bag – a dish inspired by
the Irish takeaway featuring
peppers, onions, Szechuan honey-
braised chicken and chips tossed in
a Szechuan blend, served with a
side of classic curry sauce,
Fowl
(London, UK)



Gluten free potato sandwich – thinly
sliced potatoes brushed with oil,
sprinkled with cheese and baked
until crispy. Just add your favourite
sandwich toppings!
@nutritionbyrachel
(Instagram, US)

Simple gourmet: value cuts

In the hands of innovative chefs and foodie home cooks, cheap ‘n’ cheerful cuts morph into upscale offerings.

But it’s not all about the somewhat niche fifth quarter. Sure, pioneers have brought inner organs centre stage in truly innovative ways, but, in reality, chicken achilles and intercostal skewers aren’t quite on the craveable comfort scale just yet. As such, more accessible formats are rising to the fore. Minced meat goes gourmet - think Tattie Mince noodles, Sloppy Joe sandwiches, or duck heart ragu – while meaty mélanges and pies prove perfect carriers for under-utilised bits and bobs, but in a more refined approach. We’re talking bijou hot dogs dressed to impress (bahn mi pork dogs, liverwurst latkes), meatball mania (spicy duck to lion’s head-esque giant meatballs with a Persian twist spotted at LA’s Aziza) and pies with everything including the tail, feet and gill. Blood and fat are gearing up for a revival; the former beyond black pudding and the latter in everything from starter to dessert. Speaking of divisive, chefs and resourceful home cooks put an end to Spam shame as cured meats and cold cuts get the same treatment as the finest cuts; the retro canned meat gets upgraded with Korean BBQ and gochujang flavour NPD, and Mortadella acquires a new fanbase. Mixed grills heroing house butchery and charcuterie are booming – meat sweats guaranteed. Schnitzels – veal, chicken, pork and otherwise – are all the rage, spotted both *au naturale* and lavishly dressed (cue, Caesar salad). The humble bird’s popularity continues to rise spurring stuffed, topped and wrapped wings into the culinary stratosphere – wing Wellington, anyone?

MINCE || HOT DOGS || SCHNITZELS || CURED MEATS || MIXED GRILL



Scottish-Cambodian fusion tattie mince noodles,
MAMAPEN
(London, UK)



Corned brisket frites,
Birdie G’s
(Santa Monica, US)



Smoked and fried Bologna sando: scored and seasoned, then smoked low and slow before being sliced and fried with some cheese for the ultimate grilled cheese sandwich,
@thekitchenwhitelaw
(Instagram, US)



A dish of wood-fired braised meats including pork, chicken, bone marrow and blood sausage,
Ester
(Sydney, AU)

Simple gourmet: oily fish

Tinned fish fanatics held captive by its increasingly chic credentials and social sway get a new challenge: fatty fish in fresh formats.

That's not to say tinned fish is out of the equation for gastronome; brands such as Scout and Fishwife have brought this thrifty store cupboard staple to a whole new level, while Boston's Saltie Girls' Tin List offers some regional anchovies, sardines and salmon upwards to the \$50 mark. And of course, for many, anchovies, sardines and herring are more accessible in the budget-friendly shelf-stable format, but the evolution is less "tinned fish date night" and more epicurean experimentation. And this doesn't mean being bougie; there's no sorcery here in the pretentious context, just a little help to let the fish do the talking. Mackerel rises the ranks as the 'it' fish, often served whole in pared-back styles - think blistered with buttery pan juices and sea herbs, butterflied and slowly charcoal grilled dressed with simple tabbouleh, or breaded with humble pickles to cut through the fat. Kippers, sardines and smoked trout follow a similar trajectory – the latter extra voguish in dips and on toast - while anchovies embrace their coveted umami depth beyond toast. Oeuf mayo and Caesar trends can be credited for introducing newbies to its punchy profile, producing the dizzying array of cross-category applications at play - we're talking broths, crumbs, and creams paired with meat & pasta. That said, bread is still at the apex of comforting carriers; classic styles evolve in unison with bakery trends spurring anchovies on croissant toast into action. Interestingly, and in stark contrast to the less-is-more approach, format fusion has also been spotted – think mackerel lasagna, sardine fishballs, and Thai kipper tacos.

FRESH || MACKEREL || ANCHOVIES || SMOKED TROUT || KIPPERS



A monthly pintxo special
Of gilda tartar and Ortiz
anchovy to be paired with
Txakoli Ameztoi wine for €4.95,
PerretxiCo
(Santander, Spain)



Fried mackerel with chorizo mayo
and pickled cucumber,
@lewis.de.haas
(Instagram, UK)



Kippers on flatbread doused in crab
butter with roasted tomatoes,
Galleria
(Leeds, UK)



Tinned fish flights on eggs featuring
an Asian-inspired tuna in spicy olive
oil, a Caesar egg topped with an
anchovy, smoked rainbow trout with
tomato chutney, and sardines with
lemon,
@fishwife
(Instagram, US)





Logan Moffit's salmon
bagel cucumber salad
which is now available to
buy instore at La La Land Kind
Café,
@loganm
(TikTok, US)



Smashed potato salad,
@poppycooks
(TikTok, UK)



Caesar salad - with a twist:
anchovies replaced with bloodline
tuna garum, truffle cheese shoyu
and house Worcestershire sauce,
Hamlet & Ghost
(NY, US)



Chipotle chicken dense bean salad,
@violet.cooks
(TikTok, US)



Simple gourmet: super salads

Salads have torpedoed full throttle into a new era of reinvention, and they're anything but boring!

No longer simply a stalwart for the diet-conscious, salad 2.0 is built on fun, and most importantly, flavour. TikTok disciples bring a whole new meaning to the word, levelling up budget-friendly veggies, pulses and eggs to gourmet heights. The cucumber, for instance, is anything but humble these days as TikTok's Logan Moffit catapulted the vine plant, and grocery stores, into overdrive by encouraging his 6.5M followers to use the whole cucumber in everything from California roll to chamoy pickle shaken salads, racking up over 275 million views for his reels. Speaking of viral success, smashed potato and crispy rice salads are all the rage, bringing carby comfort in spades – and there's no shortage of inspo. Think tahini mayo and jerk butter bastes or go trend-on-trend by adding Caesar and cucumber into the mix. The retro yet undeniably satiating Caesar is back on the menu, buoyed by its simplicity for recreation and relatively favourable price point when eating out. Admittedly, some of the swaps may be sacrilegious for purists but there's no denying that flavour is on point – we're talking fire and fermentation, and cross-cultural odes with everything from lemongrass in the dressing to Korean mayak eggs and aubergine 'anchovies' spotted. Not to mention somewhat loose interpretations on the OG blueprint...cue Caesar dips, chopped Caesar bagels, smash chicken Caesar tacos, shredded chicken waffles filled with Caesar salad, Caesar-topped hotdogs, Caesar-topped pizza, fried cutlet coatings – the only limit is creativity! Finally, as the seasons change, 3 words: dense bean salad.

CUCUMBER || CAESAR || CRISPY RICE || SMASHED POTATO || DBS

Simple gourmet: cold plates

Gourmet dinner doesn't have to be hot; fancy cold plates bring a whole new meaning to the occasion.

A lovechild of “picky bits” and “girl dinner”, cold plates feel less fridge raid and more considered collection. Plus, not only are they super convenient for solo affairs, they're a dawdle to assemble for easy entertaining, too. Best of all, there's no right or wrong way; personal preference makes it equally accessible for virtuous vegetarians as for the meat-loving keto cult. A TikTok-fuelled revival of cold salad plates sees hefty mayo-laden scoop salads, cottage cheese with fruit, Ritz crackers and the ubiquitous pickle gain long-awaited airtime, but a rival is coming: cue, the charcuterie plate 2.0. Meaty styles offer an outlet to champion value cuts – in a gourmet fashion, of course – but it's seacuterie platters, beyond tinned, that are edging their way to the top spot. Smoked fish and smoky fish dips (whipped roe, dressed rilletes etc.) mirror the trend for oily fish with mackerel, kippers and trout taking pride of place on the plate, while fish butchery guru Josh Niland projects the scope of innovation with yellowfin 'nduja, swordfish belly bacon rock flathead mortadella, and Murray cod chorizo. Veggie-forward plates celebrate market hauls (or last year's preserved harvest in the case of Lithuania's Pas Mus) often served with cuisine-curious dips – think miso bagna càuda at Anchovy Bandit (AU). The 'anywhere, anytime' mentality opens the door for on-the-go solutions – enter lox in a box or modern Ploughman's 'British tapas' style. Moreover, plates giving bar snack vibes come loaded with everything from cheese, cured meats, pickles and nuts to fish-forward affairs.

SCOOP SALADS || SEACUTERIE || MARKET FRESH || ON-THE-GO



Fish charcuterie plate,
Orasay
(London, UK)



“Choucroute Garnie” featuring all meats made in-house: Kielbasa, wiener, ham, ham hock and beef tongue, served with house made sauerkraut & house kosher pickles,
Fat Rabbit
(Ontario, Canada)



Charred fava with beet and feta puree, carrot salad, labneh balls, and Palestinian olive oil,
Day Trip
(LA, US)



Surf and turf leftovers snack plate of grilled octopus salad, mesquite tenderloin, wagyu flatiron, triple cream brie, Humboldt Fog, Port Salut & Cambozola finished with olive oil and flaky salt,
@julesfood
(US)

what could this mean for you?

- Real dairy, cheese and butter is back on the menu as the UPFs narrative shrouds alternatives, to a degree – brands can leverage this demand with powerful storytelling around artisanal and low-intervention processes, and natural health benefits (e.g. protein rich dairy). And tap into current flavour trends and formats for newness; e.g. churro-spiced sweet butter, or ‘Everything Bagel’ cream cheese schmear.
- With social backing, potatoes are officially cool. Possibilities for innovation are endless, but convenience is key – think pre-prepared spice bag mixes, air fryer-ready tornado fries, and even sauce-filled chips.
- Tinned and preserved fish goes from strength to strength; this year the likes of anchovy, kippers and mackerel lead the pack. How can you use these in unexpected but accessible ways, e.g. anchovy pasta, kipper tacos, fried mackerel and chips...
- Value cuts of meat get the gourmet treatment – who says Spam, ham hock, mortadella or corned brisket shouldn't get the same love and attention as a dry-aged steak? Many of these also lend themselves to the ‘cold plates’ trend... i.e. budget-friendly charcuterie
- Girl dinner gets a (unisex) makeover with the rise in gourmet cold plates – brands could tap into the market for convenient kits, added-value oily fish beyond tinned, seacuterie, and pre-portioned on-the-go options for work lunches or picnics.





MENUWATCHING STREET FOOD 2024

Welcome to our report into the hottest happenings in street food. The latest formats, flavours, cooking techniques, trending ingredients and cuisines are all covered here, as well as how and where they're being served.

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INTRODUCTION

What is street food?

Is it something that's prepared, quite literally, on the street from a gazebo or food truck? Or perhaps from a food hall or at a pop-up event? Or is it the *style* of food served that determines its categorization, regardless of its service location?

There is no concrete answer to this question, as what was once a simple foodservice option, born of necessity in densely populated areas, has become a global phenomenon: it has become a trend in its own right. The influence of street food can be seen from fine dining restaurants to global fast-food chains; it has been a composite factor in narrowing the high-low divide, ushering in a more relaxed approach to high-end dining while fueling a marked increase in quality and creativity among its street level peers.

For the purposes of this report the definition has, for the most part, adhered to the world of food trucks, street food markets, and pop-up independent traders, only widening this scope when relevant to the trend.

Pictured: Sarajevo Street Food Market (Sarajevo, Bosnia & Herzegovina)

OVERVIEW

As the restaurant industry continues to struggle with increasing costs, the stripped back nature of the street food approach can be appealing. Menus are simplified, focusing on a single product served in multiple iterations, keeping material and staffing costs to a minimum, and allowing traders to build a reputation around their chosen dish – indeed, street traders have been awarded Michelin stars for their work.

This, along with increased media exposure (think Netflix's *Chef's Table* street food episodes and Roy Choi's *Kogi* fame) has attracted a surge of interest from both traders and consumers keen to try something new. The pop-up nature of stalls and food trucks allows them to quickly adapt, changing their menus to reflect the latest trends and encouraging innovation. Most have a solid presence on social media, using the platforms to promote their businesses at minimal cost.

An influx of creativity has brought with it a huge variety of cuisines and cooking styles, which are effortlessly fused into hybrid dishes. Tacos, burgers and bao become conduits for global flavours, bringing new taste experiences to the consumer while remaining respectful to the techniques and core principles of the original dish.

Pictured: Lindholmen Street Food Market (Gothenburg, Sweden)





MENUWATCHING STREET FOOD

This report investigates current street food trends, with a particular focus on those regions known to be influential within the channel, while acknowledging significant emerging trends on a global scale.

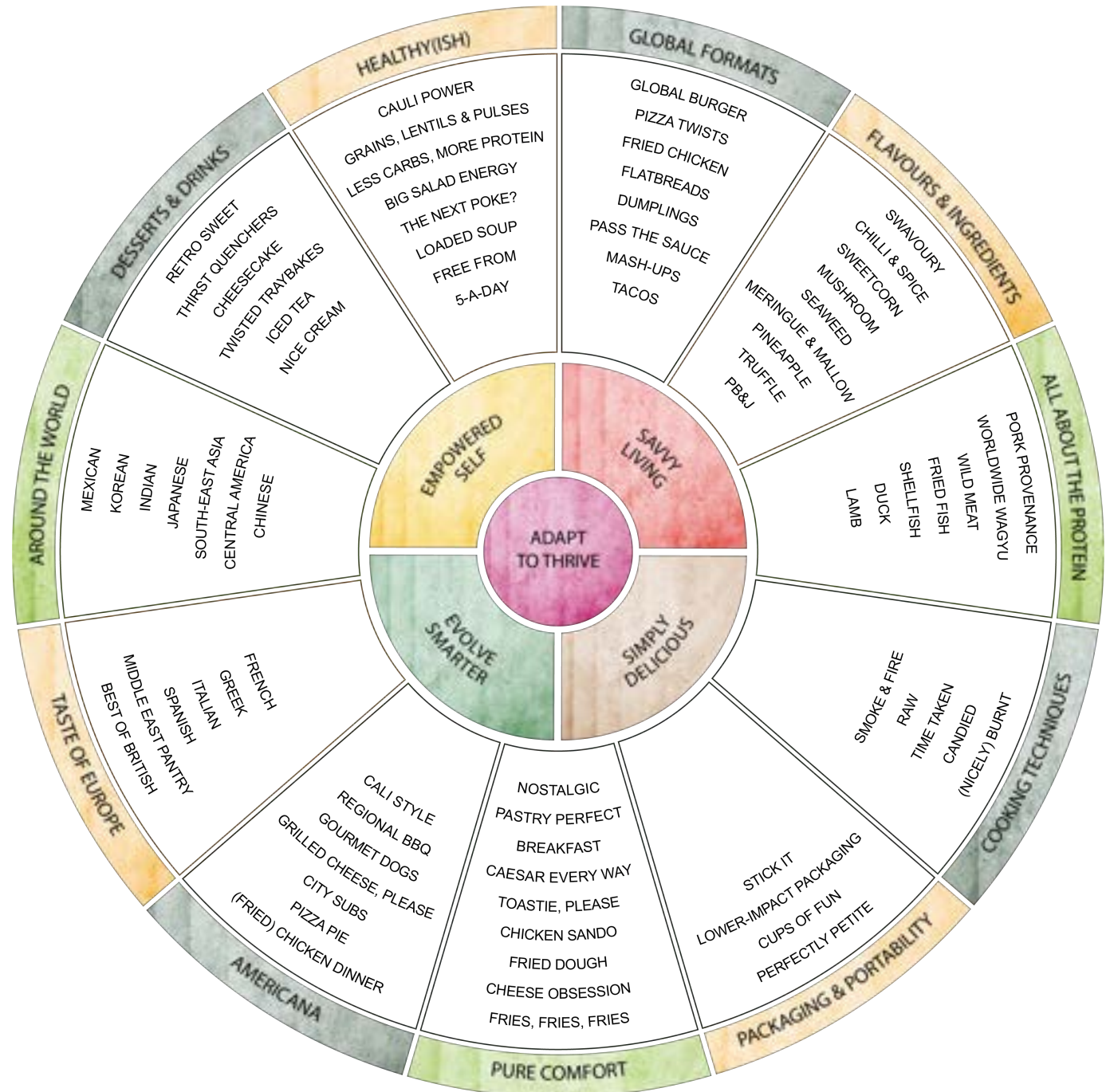
Its findings are broken down into **11 main themes**, each with its own set of sub trends. Those themes are:

FLAVOURS & INGREDIENTS // COOKING
TECHNIQUES // DESSERTS & DRINKS // PACKAGING
& PORTABILITY // ALL ABOUT THE PROTEIN //
GLOBAL FLAVOURS // PURE COMFORT //
HEALTHY(ISH) // AMERICANA // TASTES OF EUROPE
// AROUND THE WORLD



STREET FOOD TRENDS

This wheel shows the trends we have identified for this report, through our research across street food.



INFLUENCES

The following slides outline three of the key overarching themes that influence this category:

Michelin Quality

Social Influence

Affordable Joy



MICHELIN QUALITY

The street food format is garnering the attention of some renowned industry names. More associated with a style of cuisine that would at one time have been considered the antithesis of street food, Michelin starred and trained chefs are turning their hands to a more relaxed, fun approach to food.

Chefs such as Jason Atherton (*Hot Dogs by Three Darlings*, London) and James Knappett (*Bubbledogs*, London) are elevating street food staple hot dogs using classical techniques and luxury ingredients in a restaurant environment. Others move in the opposite direction, establishing true street-level businesses: Durand Vivien's *Blandice* gourmet waffles in Espelette, France, for example, Rasmus Oubæk's *Otto* pizza in Copenhagen, or *Mr. Noodle* in Bristol, UK run by Michelin trained chefs in their spare time.

All of this attests to the changing perception of street food, from being basic on-the-go sustenance to becoming a bona fide gourmet experience.





SOCIAL INFLUENCE

We now live in a truly digital age where information can be shared globally in the tap of a phone screen. Such complete interconnectedness has brought with it the viral phenomenon: shared content that receives an enormous number of views, turning its subject into an overnight worldwide sensation.

The power of social media in determining what is the 'next big thing' cannot be overstated, and this is certainly true when it comes to food. Tanghulu, sugar-coated fruits on a skewer, is a current example, going from traditional Chinese snack to appearing on street food stands across the world thanks to being shared on TikTok. Then there's the crookie, banana milk coffee, the chopped salad sandwich...

Savvy traders use this to their advantage, creating engaging posts to promote their products and upcoming locations. Some approach influential local users, offering free food in exchange for a mention that could reach hundreds of thousands of followers.

AFFORDABLE JOY

For many people, budgeting is a key component of everyday life. Food costs can fluctuate wildly, as can the cost of the energy required to prepare it, and so with every penny accounted for any occasional treat needs to be worth the money spent.

Street food can offer just that: something above and beyond the normal daily meal that can deliver food-fuelled fun without breaking the bank.

The breadth of variety on offer – whether at permanent street food halls, seasonal festivals, or with rotating pop-up vendors at food truck gatherings and pub car parks – allows diners to try dishes from diverse cuisines, to see their food being cooked up close, and to perhaps introduce them to something new... or something *old*, settling them into the warm comfort of the familiar.

Either way, well-prepared food and a vibrant atmosphere can create lasting memories; a chance to escape into the sights, sounds, scents and tastes of live cookery theatre.





FUTURE OPPORTUNITIES

CREATE A USP: Traders are adding extra value touches to their offerings in order to stand out from the crowd. Live fire cookery, the twisting and blending of cuisines, using foraged ingredients, and creating home-made sodas and lemonades to accompany food offerings are just some of the methods used.

JUMP ON THE SOCIALS: Back up a good street food concept with a solid social media presence. Posting regularly, creating interactive content and using carefully selected tags can greatly improve the performance of (i.e., engagement with) an account. A strong following can translate into a core consumer base, allowing traders to advertise directly to their customers, who in turn share this information via their own followership. In addition, keeping a keen eye on social media allows traders to keep up-to-date with the latest food trends and incorporate them into their own menus.

GET SAUCY: Sauces are a great way to bring new, trending flavours into existing offerings without the need to reformulate the core recipe. A chicken burger can be flavoured a hundred different ways using sauces alone, which can also be served on the side as an optional upsell item. From Caesar dressing to banana ketchup to sauce au poivre, sauces and dips can often lead the way when it comes to trending global flavours.



KEY INGREDIENTS



CREAMY

American cheese
Avocado
Clotted Cream
Cream cheese
Custard
Feta
Mozzarella
Raclette
Ricotta



SPICY

Chipotle
Cinnamon
Garam masala
Gochujang
Habanero
Jalapeño
Mala spice
Sambal
Scotch bonnet
Sriracha
Tajín
Togarashi



EARTHY

Buckwheat
Cauliflower
Cornflakes
Lentils
Matcha
Millets
Mushroom
Peanut butter
Pistachio
Sesame
Sweetcorn
Tahini
Tamarind
Tea
Turmeric
Ube



FRUITY & TART

Banana
Hallabong
Lime
Mango
Melon
Peach
Pickles
Pineapple
Pomegranate
Raspberry
Sudachi
Strawberry
Vinegars
Watermelon
Yuzu



UMAMI

Anchovy
Bacon
Miso
Soy
Parmesan
Seaweed
Smoked cheese
Truffle

GLOBAL FORMATS

GLOBAL BURGER

PIZZA TWISTS

FRIED CHICKEN

FLATBREADS

DUMPLINGS

TACOS

MASH-UPS

PASS THE SAUCE



TFP TREND ALIGNMENT: Simply Delicious || Savvy Living

KEY REGIONS:





GLOBAL FORMATS

Burgers, pizzas, dumplings and tacos, despite having their roots in specific national cuisines, have been adopted the world over to become truly global formats.

With adoption comes evolution. In a time where ideas can be shared across the world in seconds, these globally recognised formats are being twisted in ever more inventive directions as cuisines fuse, formats meld in bold **mash-ups**, and flavours from every corner of the Earth come together in unique offerings. **Burgers** and **pizzas** are hotbeds of flavour play, with North African, East Asian, Latin American – and more – ingredients applied, while **fried chicken** gets the same treatment via brining and coating ingredients. Global **flatbreads** showcase a broad range of carriers, often with the benefit of being allergen-free, and **dumplings** prove to be a favourite flavour carrier, paired with punchy sauces and broths.

Pictured: BBQ beef short rib & pickled cabbage in a green herb bao, Bundits (Edinburgh, UK)

GLOBAL BURGER

The basic burger formula is simple: a bun, a patty, and a choice of condiments. Above that, it's a blank canvas for flavour innovation.

Inspiration comes from beloved global cuisines and the twisting of their key dishes into burger flavours. Italian is a particular favourite with carbonara, cacio e pepe and vodka parm flavours applied through sauces and garnishes. Japanese cuisine has a strong presence too, with miso, teriyaki and ramen used. Indian, Thai, French, North African; think of a global cuisine and a vendor somewhere is probably applying it to a burger. Flavours can be regional too, as showcased in Spain's 'Champions Burger' event which sees street food vendors from across the country compete for the nation's best burger title with innovative regional and global concoctions.

Pictured (clockwise from top left): Cacio e pepe burger: Damini beef patty, cacio e pepe sauce & courgette, **Apecesare** (Milan, Italy) || Breaded lasagna burger with pancetta, pesto mayo & tomato jam, **Burger Burger** (Christchurch, NZ) || Spicy ramen topped burger, **Ikigai** (Edinburgh, UK) || Indian-inspired beef burger with shredded lamb, pickled onions & tikka masala mayo, **La Boca Agua** (Valladolid, Spain)





PIZZA TWISTS

Pizza, the sacrosanct Neapolitan disc of dough, revered the world over as one of the street food greats. But ultimately, it *is* still a flatbread... right?

As a flatbread, pizza is able to host endless flavour combinations and be twisted, folded, fried and filled in myriad ways. Italy's piadina and panuozzo, both popular street food formats, form the inspiration for TikTok's current 'pizza sandwich' trend which sees a cooked pizza base folded and filled with cheese, vegetables and cold cuts, which in turn has led to pizza vendors offering it as an option. Meanwhile, the more recognisable pizza format is playing host to flavours from Japan, India, Thailand and Korea (to name but a few) and being topped with anything from cold salad to hot birria and dip.

Pictured (clockwise from top left): Viral 'pizza sandwich' trend: a pizza dough flatbread filled with mozzarella, charcuterie and rocket – essentially, a piadina, **@tom.smallwood** (TikTok, Australia) || Gorgonzola salad pizza, **Riko's Pizza** (Greenwich, USA) || 'Ruby Murray': tandoori chicken, masala base, popadom & mango chutney, **Pizza Punks** (Glasgow, UK) || Buldak (Korean hot) fried chicken pizza, **Po'boys Pizza** (Durban, South Africa)

FRIED CHICKEN

Thigh, breast or wing... whatever your preference there's a fried chicken flavour for you!

US styles such as Nashville and Buffalo continue to bring the heat, while Taiwanese fried chicken – the oversized butterflied fillet – is returning to menus, offering more bang for your buck in terms of crunch-coated surface area. Operators call out brines and marinades (ubiquitous dill pickle being a brine favourite) as adding depth of flavour, while specific starches, such as potato and rice, bring an elevated crunch. Familiar dishes inspire flavour plays, especially Italian, with the likes of Parmigiana and carbonara appearing as indulgent burgers, alongside east-west flavour mash-ups drawing on ingredients from multiple cuisines.

Pictured (clockwise from top left): Taiwanese fried chicken, pineapple hoisin glaze, kewpie mayo, **Crafty Burger** (Leicester, UK) || Agave-glazed buttermilk fried chicken wings with pickled red onion ketchup, **Death By Tacos** (Chester, UK) || Carbonara fried chicken burger, **Dogma** (Paris, France) || Fried chicken wings dipped in cowboy butter (butter, herbs & spices), **Krafted Krust** (Johannesburg, South Africa)





FLATBREADS

Flatbreads are a true global format, with near every cuisine laying claim to its own unique style.

Turkish and Greek-style kebabs pair grilled meats and vegetables with pita, bazlama and lavash breads, perfect for wrapping contents into a convenience single-hand size, with more regional flavours appearing from Syria, Armenia, and Lebanon. South America brings the arepa and pupusa, maize-based flatbreads topped or filled with both traditional and fusion flavours, with the added benefit of being naturally gluten free... as is teff, the grain used to make Ethiopian injera, a fermented flatbread-come-pancake that's also turning up in crossover flavour combos, offering something new with a familiar twist.

Pictured (clockwise from top left): Nashville hot fried chicken with Ethiopian doro wat sauce, served in injera bread, **Hesi Jimbo** (Preston, Australia) || Afghan chicken wrap with coriander chutney, **2 Lads** (London, UK) || Spiced lamb tantuni (Turkish stuffed lavash flatbread), **Anatolia** (Melbourne, Australia) || El Salvadorean pupusa with Korean bulgogi & kimchi, **La Pupusa** (Los Angeles, US)

DUMPLINGS

With a wider trend across foodservice for bite-sized, scaled down formats, dumplings are proving to be a firm street food favourite.

From German knödel to Chinese wonton, operators are offering steamed, boiled, deep- and pan-fried dumplings representing a broad variety of cuisines. South and East Asian formats are prevalent as favourites siu mai and gyoza rub shoulders with Nepalese momo and Korean mandu, bringing fragrant spices and deep umami flavours, while European gnocchi and pierogi are served stuffed and topped with slow roast meats and cheeses. Indeed, Choola, a Nepalese street food trader was crowned overall winner at the British Street Food Awards in 2023 with a menu based around momo, showing that appetite for these finger food favourites is as keen as ever.

Pictured (clockwise from top left): Roasted sweet potato, walnut & caramelized onion pierogi, **Pierogi Pierogi** (Melbourne, Australia) || Vietnamese 'hoành thánh' fried pork dumplings, **Viet Street Food** (Warsaw, Poland) || Hand-rolled gyoza with sticky rice & katsu sauce, **Big Mouth Gyoza** (Huddersfield, UK) || Uzbek lamb manti, **Oshpaz** (London, UK)



DUMPLINGS



Pictured (L to R): Meat-free mushroom siu mai with soy & chilli oil dips, **Ah Ma's Dumplings** (Bristol, UK) || Loaded gnocchi with Parmesan crusted fried chicken, blue cheese & hot sauce, **Dirty Gnocchi** (Cardiff, UK) || Nepalese momos & dip, **Momo Fomo** (Los Angeles, US)



TACOS

Perhaps the ultimate one-handed snack, tacos are a superstar of the street food scene, and subject to a near endless number of twists.

The classic corn masa tortilla plays host to Mexican staples and global flavours alike, with fillings as diverse as fried chicken, tikka masala and sushi. The tortilla is swapped out for all manner of other carriers formed into that familiar taco shape, including celeriac, seaweed and caramelised cheese (for carb free indulgence!). Regional variations appear, sometimes far removed from the original, such as the French (or Lyonnais) taco which is more of a burrito-panini hybrid, that has become a standard in global French-speaking countries.

Pictured (clockwise from top left): Sushi taco containing raw scallop (L) & salmon (R) in a tempura nori shell, **Taco Nori** (Vancouver, Canada) || Steak & chips taco using caramelized cheese as a taco shell, **Masa** (London, UK) || Taco Lyonnais/Francais, typically filled with Maghrebi spiced beef with a gratinated Emmental crust, **Chamas Tacos** (Lyon, France) || Fish & chips taco: Modelo battered fish, pea guac, matchstick potatoes & pickled red onion ketchup in a corn tortilla, **Death By Tacos** (Chester, UK)

MASH-UPS

For those times when one street food format just isn't enough, operators can always be relied upon to freshen the formula, mixing two (or more) fast food favourites to create something new and wholly unique.

Such was the genesis of bakery's current superstar, the 'crookie' cookie-croissant hybrid, which has already made its way to the street food arena. Tempura-battered sushi hot dogs are popping up across US and European street food stalls, with 'pizzadilla' (pizza-quesadilla), burger tacos and a constant stream of other hybrids appearing. Operators invent fun products based around recognisable formats, which allows them to capitalise on the sharing culture of Instagram/TikTok with little risk of alienating the consumer.

Pictured (clockwise from top left): Steak & ale cheeseburger replaces the lower half of the bun with a pie, **Hills** (Brecon, UK) || Choc chip & Nutella crookie, **Lunko** (Liverpool, UK) || Sushi hot dog: tempura battered nori roll topped with shrimp, **Sushi At Home** (Porto, Portugal) || Philly steak egg rolls, **Perfectly Flavah'd** (Massachusetts, US)





PASS THE SAUCE

One of the simplest ways to freshen up a format is to introduce a new sauce to the equation. In this way, familiar dishes are given an interesting edge, borrowing flavours from both established and emerging cuisines.

Latin American sauces lead the way as lesser known offerings from Mexico, Colombia, Peru and Argentina (such as salsa criolla, hogao and guasacaca) sit alongside familiar chipotle and chimichurri. The Middle Eastern larder brings mango-based amba, toum and tasi, while East and West African flavours continue to show a presence through, among others, Ethiopian kochkocha and Ghanaian palaver sauces. Ever popular Japanese and Korean sauces manifest as ponzu twists (using grapefruit or bergamot), and as gochujang and ssamjang dips and dressings.

Pictured (clockwise from top left): Falafel with tahini & amba dipping sauce, **Amba** (Dublin, ROI) || Sweet potato fries, pork belly & salsa criolla topped with aji verde, **The Peruvian** (Edinburgh, UK) || Fries with tashi dip & za'atar, **Cyprus Kitchen** (Bristol, UK) || Arepa filled with pork, guac & hogao salsa, **Lady T** (Melbourne, Australia)

FLAVOURS & INGREDIENTS

- SWAVOURY
- CHILLI & SPICE
- SWEETCORN
- MUSHROOM
- SEAWEED
- TRUFFLE
- PINEAPPLE
- MERINGUE & MALLOW
- PB&J



TFP TREND ALIGNMENT: Simply Delicious || Savvy Living

KEY REGIONS:



FLAVOURS & INGREDIENTS

The street food world can always be relied upon to bring big, bold, interesting flavours to the table.

Right now, that's exactly what's happening. Inspiration comes from every corner of the world, and covers all bases in terms of flavour, texture and colour. Deep savoury notes pair with sweet ingredients to produce crossover **swavoury** flavours, while textural contrast comes by way of **mallows and meringues**, light and airy and melt-in-the-mouth. Hot **spice** continues to inspire dopamine-inducing creations, particularly when it comes to coated and fried foods, but fear not, if things get too spicy **pineapple** is at hand to temper that heat in its own unique way. **Mushrooms, truffles** and **seaweed** bring bags of umami (and much more besides), while **sweetcorn** adds a splash of colour via Mexican and Korean inspired offerings, and US comfort food – OG of the street food world – offers up **PB&J** as the go-with-anything combo of the moment.

Pictured: Chocolate covered street corn (elote) in a cup, Amaize (Berlin, Germany)

SWAVOURY

The sweet-savoury boundary has never been less defined. Savoury formats play host to sweet ingredients, sweet formats are loaded with salty, spicy goodness... and street food is proving to be its favoured testing ground.

The swavoury trend can be broadly split into three hashtag-friendly groupings: swalty (sweet-salty), swicy (sweet-spicy) and the newest kid on the block, swumami (sweet-umami). The result sees sweet bakery items paired with chili, miso, cured meats and cheeses; fried chicken is glazed in hot honey and fries are paired with soft serve dip; while sriracha, vinegar, dried fish, even Vegemite, make their way into ice creams and sorbets. Move over salted caramel, things just got real.

Pictured (clockwise from top left): Spiced salami topped caramel doughnut, **Project D** (UK) || Korean fried chicken with gochujang sauce, 'magic cream' drizzle & hot honey, **Manna Seoul** (Cambridge, UK) || Nashville hot chicken burger served with maple syrup and vanilla ice cream, **Burger Co.** (Sydney, Australia) || Swavoury soft serve featuring (amongst other things) sambal, dried anchovy, chilli crisp and vinegar paired with tres leches ice cream and fruit sorbets, **Happy Endings** (London, UK)





CHILLI & SPICE

Vendors are turning up the heat and they're not afraid to shout about it! With names like 'the insane burger' or the 'ring of fire', the extra hot message is delivered with aplomb as burgers, chicken, fries and more are loaded with searing Scoville spice.

But it's not just about straight-up heat. The nuances of specific chilli varieties (think habanero, Scotch bonnet, or new chef's favourite the Jimmy Nardello) are championed, and spice blends such as jerk, mala and forever favourite Buffalo grace menus. Any heat source is game, from crushed spicy crisps to branded sauces, with levels tempered using creamy condiments, sharp citrus and super-sweet pairings like hot honey, providing a welcome counter to that capsaicin tingle.

Pictured (clockwise from top left): Szechuan raspberry ripple ice cream, **Big Kid** (London, UK) || Mac 'n' cheese topped with pulled jerk chicken, sriracha mayo & Flamin' Hot Wotsit crumb, **Mac Daddies** (Hereford, UK) || Extra hot fried chicken spice blend: Nashville hot seasoning with added cayenne and habanero, **Senseless Heat** (Exmouth, UK) || The 'Evel Pie' pizza with a reaper pepper sauce base and cheese soaked in habanero oil which is *literally* served on fire, **Evel Pizza** (Las Vegas, US)

SWEETCORN

Sweet, vibrant and (most importantly) delicious, sweetcorn is proving to be a go-to ingredient for forward thinking vendors.

Fuelled in no small part by the popularity of Mexican cuisine, street food favourite elote (or Mexican street corn) is a standout format, pairing corn with fresh, light cheeses and sour-spicy *Tajín* seasoning. That in turn is inspiring format mash-ups, where the elote flavour profile is applied to loaded fries, hot dogs, viennoiserie and more.

Sweetcorn's natural sweetness sees it popping up in dessert guise too (corn soft serve became an early autumnal TikTok hit in Australia)... and given the world's sustained love affair with K-wave culture, where corn is a sweet *and* savoury format favourite, this trend isn't leaving any time soon.

Pictured (clockwise from top left): Elote (Mexican grilled street corn) with chipotle mayo, feta and Tajín, **Miz Street Food** (Devon, UK) || Mexican-inspired sweetcorn arancini, **Thyme Travelling Food Truck** (Boston, US) || Sweet corn soft serve, **It's Corn** (Sydney, Australia) || Elote Danish – sweetcorn, feta cream, chilli & lime, **Grizzly** (Christchurch, NZ)





MUSHROOM

Our fungi friends have long been seen as a substitute for meat, but that's only half the story.

As well as being a delicious, nutritious plant-based ingredient, mushrooms can give an added hit of umami to a dish, and that's just what vendors are doing. So burgers – both animal and plant-based – are topped with creamy mushroom sauces, crisp enoki, and slabs of meaty grilled Portobello. Plant-based 'junk food' is still the mushroom's stronghold, however, and operators are ever more inventive with their offerings. Specific varieties such as hen of the woods (aka maitake) or shiitake are grilled, fried, pickled and dried to create myriad textures to pair with a truly global flavour palette.

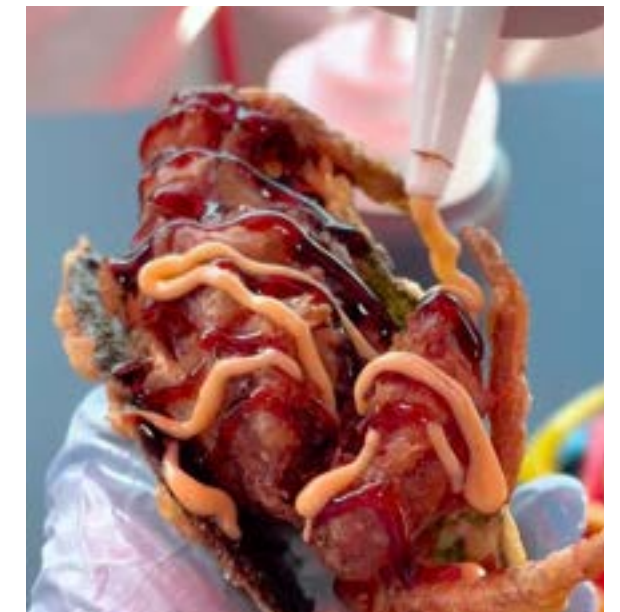
Pictured (clockwise from top left): Korean enoki burger, **Wholesome Junkies** (Manchester, UK) || Smoked oyster mushroom taco, **Esse Taco** (NYC, US) || Tempura maitake po'boy with cashew-chipotle cream, **Pantera Negra** (Los Angeles, US) || 'Holy Shiitake' burger containing crispy portobello mushroom, pickled shiitake & oyster mushrooms, **Wild Street Kitchen** (Southport, UK)

SEAWEED

Want to zhuzh up your salt? Add seaweed!

The green stuff (and red, purple, brown...) is being used to add a little *je ne sais quoi* to street food seasoning. Inspired by seaweed's long, storied use in Japanese cuisine, vendors are creating their own seasoning blends mixing common-a-garden NaCl with kombu, nori, wakame et al to produce deeply flavoursome salts to sprinkle over fried chicken and fish. Some eschew the salt altogether, using straight up powdered seaweed for a flavour and colour hit or replace lettuce with dulse to garnish a burger; while others blend seaweed through mayo and ketchup... and with lower sodium levels compared to salt, seaweed can claim a health benefit too.

Pictured (clockwise from top left): Signature chicken burger seasoned with their cult 'seaweed crack' (a mixture of nori, kombu, smoked paprika & salt, **Chick 'n' Sours** (London, UK) || Hot dog with padron peppers & roasted nori mayo, **Falstaff** (Germany) || Honolulu seaweed taco: tempura seaweed taco shell filled with raw tuna & chipotle mayo, **Foodieland** (Phoenix, US) || 'The Dutchie': a burger patty containing 25% seaweed-derived protein and topped with dulse & cheese, **Burgerij** (Amsterdam, Netherlands)





TRUFFLE

Fancy fungi brings fantastic flavour!

No longer the preserve of high-end restaurants, truffle has become an accessible, egalitarian street food ingredient used to add a touch of luxe and a whole load of umami to dishes. Truffle infused butters, oils and mayos bring a savoury depth to fries, while truffle-cheese combos dial up the umami in grilled sandwiches and burgers.

Truffle's savoury strength means that it's often paired with sweet ingredients for a swavoury play, flavouring honey and sweetened dairy, or adding an umami hit to sweet bakery and viennoiserie.

The more accessible truffle becomes, the more decadent its use, with truffle oil, truffle honey and fresh truffle all used on a single product for a full-on truffle party!

Pictured (clockwise from top left): Truffle & Parmesan fries with freshly shaved black truffle, **Viertel Dach** (Basel, Switzerland) || Ham & mushroom pizza with deep fried mushrooms & truffle paste, **Unlock Pizza** (London, UK) || Cheese & fresh truffle toastie, **Ripe** (Melbourne, Australia) || Truffled vegan chick'n burger with white truffle vegan honey, **Next Level Burger** (US)

PINEAPPLE

Does pineapple belong on a pizza? The answer, it would seem, is *absolutely* yes!

The sweet, tropical fruit is bringing sunshine vibes and cool kitsch to burgers, pizzas, BBQ and beyond... and that's just the savoury stuff.

Street food staples like burgers, pizzas and hot dogs are made 'Hawaiian' by the addition of a ring of pineapple, embracing retro Californian comfort. While the fruit provides a perfect foil to spicy heat in the form of chutneys, salsas and jams, served alongside hot BBQ, sticky bao and crispy chicken wings. It's proving popular in drinkable formats too, like smoothies, slushies and iced tea, while tepache (a fermented pineapple drink) doubles as a marinade and dressing, adding a sweet yet tangy note to proteins.

Pictured (clockwise from top left): Jerk coated fried chicken wings served with pineapple salsa, **Dirty Chicken** (Nottingham, UK) || Pineapple iced tea, **Hoy Pinoy** (Adelaide, Australia) || 'The Big Kahuna' plant-based burger with caramelised pineapple, **Herbivorous** (Sheffield, UK) || Tepache marinated fried tofu with hot peppers & fresh pineapple, **Paste** (Toronto, Canada)





MERINGUE & MALLOW

Fluffy, whipped marshmallow and meringue are bringing melt-in-the-mouth moments to drinks and desserts.

Textural contrast is their main calling card, bringing an airy counter to dense dairy desserts and ice cream, or a decadent topping for iced drinks. Marshmallow is paired with chocolate and pastry, to create riffs on the s'mores format, or used as an inclusion for a touch of chewiness, while meringue is piped high and torched for a satisfying brûlée finish.

These light, airy textures also appear more widely across retail and foodservice, suggesting a broad consumer appetite for the fluffy stuff!

Pictured (clockwise from top left): Gelato-topped mud cake with torched meringue topping, **Messina Milkbar** (Sydney, Australia) || Marshmallow-topped latte with Rice Krispie cake, **Curbside Coffee** (Pittsburgh, US) || Frozen marshmallow hot chocolate ice cream bar, **Chin Chin** (London, UK) || Marshmallow cream with caramel & nibbed hazelnuts, **Razz & Rübe** (Nürnberg, Germany)

PB&J

This US comfort food favourite is making waves across street food, both in and outside of its home territory.

The nostalgia-heavy combo of peanut butter and jelly (or jam, for non-Americans!) smeared between two slices of bread evokes, for many, childhood memories of post-school snacking. But for others, particularly outside of the US, PB&J plays to the borrowed nostalgia adopted through American TV and movie imports. However it hits, one thing's for sure: the sweet-salty-creamy combination is striking a chord with consumers, finding a home in everything from brownies to burgers to beer. There are riffs on the combo too – think tahini in place of peanut butter, paired with chilli jam – showing that there's plenty of life in this old dog yet.

Pictured (clockwise from top left): PB&J crêpe, **Saddle** (Dubai, UAE) || Chicken schnitzel sandwich with bacon, peanut butter & jam, **Cheat Day** (Sydney, Australia) || PB&J loaded fries, **Potato Champion** (Portland, US) || Peanut butter jelly sour ale (5.5% ABV) brewed with peanut butter powder and forest fruits, **Ivana** (Croatia)



ALL ABOUT THE PROTEIN

DUCK

LAMB

PORK PROVENANCE

WORLDWIDE WAGYU

WILD MEAT

FRIED FISH

SHELLFISH



TFP TREND ALIGNMENT: Simply Delicious || Empowered Self

KEY REGIONS:





ALL ABOUT THE PROTEIN

Animal proteins remain the stock-in-trade of global street food vendors, where beef, pork and chicken have long led the way. Those three proteins continue to prove popular, but they are increasingly joined by less obvious options such as **duck**, which has seen a growth in vendors specialising in that meat. **Wild meat** from deer, boar and pheasant is being championed as a more sustainable option, as well as being a point of interest for those less familiar with it. The popularity of Mediterranean and Middle Eastern cuisines drive flavour-packed preparations of **lamb**, while the bar on beef is being raised through a growth in the use of **wagyu**. Pork, too, comes under the spotlight as vendors highlight the **provenance** of their meats, using it to denote quality of both flavour and welfare standards, and seafood shines with fun takes on **fried fish** and **shellfish** dishes that bring gourmet ingredients to the masses.

*Pictured: Porchetta & scamorza sandwich, **Mr Porchetta** (London, UK)*

DUCK

Long overshadowed by the ‘big 3’ of beef, chicken and pork, duck has come into its own as a protein focus for street food vendors.

Building on its presence last year, new vendors have appeared specialising in the waterfowl, making use of all aspects of the bird. Its flavoursome fat is used for deep frying and for adding richness to other dishes (a beef hot dog enriched with duck fat, for example), while the leg and breast meats are served intact, braised and pulled to top fries or rolled into croquettes, and minced for use in decadent duck burgers and hot dogs. Duck skin too is crisped to act as a seasoning. There are clear French and East Asian influences, with both duck-frites and duck-hoisin combos commonly seen, in a trend that takes an ingredient often thought of as luxury and reframes it as an affordable alternative to chicken.

Pictured (clockwise from top left): French duck burger, **The Frenchie** (London, UK) || Crispy duck gyros served with Chinese salad & duck fat fries, **Duck & Roll** (Midlands, UK) || Duck & haggis bon bons, **What Le Duck** (Edinburgh, UK) || Duck hot dog served with fries, **Hot Duck** (Ismir, Turkey)





LAMB

Eastern Mediterranean cuisine has seen a rise in popularity across casual dining in recent years, thanks to its mixture of fresh, vibrant flavours, and aromatic condiments – and when it comes to that region's cuisine, one meat reigns supreme: lamb.

Any street food market worth its salt will invariably feature a Greek, Turkish or Middle Eastern inspired trader serving up kofte, keema, kebabs and more, pairing succulent lamb with fragrant spices and zesty sauces. Though less associated with US-style BBQ, traders are using lamb in the way they might beef or pork, employing low 'n' slow smoking techniques to lamb rump and rib, or serving sticky lamb shoulder bao and lamb smash burgers. Provenance is a common call-out with specific breeds and regional produce highlighted.

Pictured (clockwise from top left): Smoked tamarind BBQ lamb ribs using single breed British lamb, **Ruben's Reubens** (London, UK) || Roast lamb shoulder, fleurs des monts & salsa verde sandwich, **Elena** (Montreal, Canada) || NZ lamb smash burger with kumara fries & maple chipotle glaze, **Burgernaut** (Auckland, NZ) || Cotswold minted lamb meatballs with pickles, minted yoghurt & sheep's milk cheese, **Baste** (Oxford, UK)

PORK PROVENANCE

Gone are the days of a simple pulled pork sandwich.

As consumers grow increasingly aware of what they eat and where it comes from, vendors are responding by sourcing high quality, traceable pork and sharing those details with their customers. Single and rare breed meats such as Tamworth, Mangalitsa and Kurobuta are transformed into hot dogs, braised and pulled for bao, and slow roasted as porchetta – complete with trademark crisp crackling. Locality is key too, as operators detail the farms from which their pork is sourced, with low-miles sourcing considering a badge of honour.

Pictured (clockwise from top left): Pork sandwich using pork from the 'Maiale di Cinta Senese DOP' breed from Cortona, Tuscany, **Porcocrado** (Frankfurt, Germany) || Hot dog sausage made using ex-breeding rare breed sows, **Chet's** (London, UK) || Kurobuta (black pig) hot dog, **Evil Sando** (NYC, US) || Food truck chalk board menu detailing use of Mangalitsa pork, **Iggy's** (Washington, US)





WORLDWIDE WAGYU

Much like truffle, wagyu beef has gone from being a luxurious rarity to something much more accessible.

The cattle breed, originally from Japan, has now spread across the world, normally being bred with local livestock to produce wagyu hybrids (such as Angus x wagyu cross). So, while Japanese wagyu retains an element of exclusivity, that produced in other countries, such as Australia and the US, can be somewhat more affordable whilst retaining the allure of a premium product. Famed for its high level of fat marbling which contributes to its tenderness and flavour, wagyu is being offered up in burgers, bao, birria and beyond, bringing a touch of luxe to food trucks everywhere.

Pictured (clockwise from top left): Kiwami wagyu brisket quesadilla, **Tacos LA** (Melbourne, Australia) || This outlet recently announced that it was 'upgrading' its Australian wagyu beef to Japanese A5 wagyu (for use in its burgers), **Pitboy BBQ** (Puchong, Malaysia) || Wagyu bao bun, **The Bun Mobile** (Brisbane, Australia) || 6oz wagyu burger, **Ryan's REZ-ipes** (Washington, US)

WILD MEAT

Game meats such as venison, pheasant, pigeon and wild boar are making their way into burgers, hot dogs and tacos, offering a new taste experience for many consumers.

These wild and semi-wild meats (that is, game raised on estates with minimal human input) are often cited as being a more sustainable alternative to beef, pork, chicken or lamb, as well as being leaner proteins (though, is anyone *really* counting macros when they eat a burger?). Mostly, this is about flavour, and offering the public something a little different. For the most adventurous, camel, moose, even rattlesnake is being offered in burger and sausage form, making use of whatever is abundant in the local region.

Pictured (clockwise from top left): Lakeland venison burger & fries, **Beetham Food Truck** (Milnthorpe, UK) || Venison & pheasant hot dog, **Wild Dogs** (Edinburgh, UK) || Jerk BBQ'd wild boar belly, pickled chilli salad & fries, **Wild Street Kitchen** (Shrewsbury, UK) || Camel burger with harissa & goat's cheese, **The Cardinal** (North Carolina, US)





FRIED FISH

Fried fish is getting fancy! Specialist seafood vendors are reimagining the seaside formula of fried fish and chips, bringing it bang up to date using globally-inspired flavours and lesser used catches.

This UK-centric trend has been growing for a number of years. Led by semi-permanent seafood shacks serving imaginative seafood from harbour locations, this has spread to see vendors offering fried fish twists at events across the country. Batter coatings are twisted to incorporate herbs and spices, or reimagined as South Asian-inspired pakora and bhaji. South American flavours with their chilli-citrus combos are found through sauces and dips. While whiting, whitebait and dab sit alongside the expected cod and haddock.

Pictured (clockwise from top left): Pakora-fried Cod fillet, apple & turmeric slaw, hot mango & tikka mayo sauces, **Baba Dhaba** (London, UK) || Haddock goujons with sriracha & sour cream sauce, **The Seafood Shack** (Ullapool, UK) || Crab onion bhajis with brown crab mayo, **Riley's Fish Shack** (Tynemouth, UK) || Breaded whiting sandwich with curried mayo & turmeric kraut, **Skipper's Scrان Van** (Kirkcudbright, UK)

SHELLFISH

Crustaceans for all occasions!

Ingredients that were once considered an everyman's food – think oysters, monkfish, caviar – have, over time, become synonymous with luxury. Lobster, mussels and crab fall into that category, being seen by many (in the west, at least) as an elevated option to be enjoyed as an occasional restaurant treat. Street food is the antithesis of restaurant culture, stripped back and simplified, and it's here that shellfish is returning as an accessible, affordable protein. Lobster, the superstar of shellfish, can be found mixed through mac 'n' cheese, stuffing subs and packed inside toasties, while mussels are served by the steaming bowlful with Thai, Italian and classical French flavours. Oysters come freshly shucked with imaginative dressings, and tempura fried in a playful twist on scampi.

Pictured (clockwise from top left): Soy sauce crab sub, **Mr Boney** (Edinburgh, UK) || Mesquite grilled lobster, **Lobsterdamus** (Phoenix, US) || Clew Bay oysters, parsley & guajillo oil, **Misunderstood Heron** (Galway, ROI) || Lobster grilled cheese sandwich, **Cousins** (Chicago, UK)



COOKING TECHNIQUES

(NICELY) BURNT

CANDIED

TIME TAKEN

RAW

SMOKE & FIRE

TFP TREND ALIGNMENT: Simply Delicious



KEY REGIONS:      



COOKING TECHNIQUES

With food on offer showcasing cuisines from around the world, street food naturally makes use of multiple cooking techniques too.

Of those techniques, the use of **fire and smoke** stands out for the breadth of styles used and number of ingredients those techniques are being applied to, whether that's fire pit BBQ meats, the **time taken** to slowly smoke joints and charcuterie, or the searing heat of a konro grill. The use of fire extends to sweet formats too, as pastries, bakes and desserts are finished with a **(nicely) burnt** caramel layer that sees brûlée formats return to prominence, while sugar – alongside honey, agave and maple syrups, even soft drinks – forms the basis of **candied** formats and garnishes that blur the sweet-savoury boundary. At the extreme opposite of the culinary spectrum, **raw** seafood offerings mark a departure from the usual street food fare, suggesting an increasingly adventurous consumer palate.

Pictured: Slow-smoked brisket, Ryan's REZ-ipes (Washington, US)

(NICELY) BURNT

There's something about the crack and crunch of a brûlée top that keeps us going back for more.

The simple act of sprinkling sugar on a snack and.. well, burning it... can transform a basic treat into something transcendental, adding textural contrast and a trademark bittersweetness. Street food vendors know all too well the power of a brûlée and so are applying it to drinks, desserts, burgers and bakery.

Want a burnt custard topped chocolate drink? No problem. Fancy a crisp sugar shell on your smash burger? They've got you covered. And it doesn't stop there, the brûlée format can be seen topping everything from crumbles to crêpes to cookies to cocktails.

Pictured (clockwise from top left): Wye Valley rhubarb & custard crème brûlée, **Pwdin** (Cardiff, UK) || Chocolate soft serve with a burnt custard topping, **Thrills** (Hawaii, US) || Brûlée-topped apple crumble & custard stack, **Scrumptious Stacks** (Birmingham, UK) || Fried chicken burger in a brûléed doughnut bun, **Brassica** (Bangkok, Thailand)





CANDIED

There's no finer testament to street food's love of swavoury flavours than its use of candied ingredients.

Perhaps more familiar as syrup-dipped fruits and nuts used to garnish baked goods, the candying technique is being applied to wholly savoury ingredients to create dishes that hit dead centre on the sweet-savoury axis.

Candied chillies bring sweet heat to grilled and fried meats, and sugar-coated pickles create an on-trend savoury take on tanghulu. But it's bacon that's proving the standout ingredient. Finely chopped pieces are cooked down in sugar syrup (or even sugary soft drinks) until crystalline and glistening with a sweet umami punch, ready to add an extra dimension to savoury street food favourites.

Pictured (clockwise from top left): Candied dill pickles, **Exquisite Treats** (US) || Smoked chicken wings, chicharrones & candied jalapeños, **Ruben's Reubens** (London, UK) || Smash burger with smoked beef cheek & jalapeños candied in Dr. Pepper, **Krispy's** (Melbourne, Australia) || Cheesy fries topped with candied bacon, **Mother Flipper** (London, UK)

TIME TAKEN

For a street food snack to be a true grab 'n' go affair, hours, days (even weeks!) of preparation must be done behind the scenes. Given such a serious investment of time, vendors are understandably eager to share those details with their customers.

Brining and marinading times are called out on menus as a signifier of quality and depth of flavour, particularly around fried chicken, which also sees 'twice fried' boasts as a route to extra crispness. While long, slow cookery is associated with tenderness in the world of BBQ and pulled meats, with tallied cooking hours worn as a badge of honour. And it's not just meats: chutneys and ferments may take weeks to prepare, all to transform your burger into something 'extra'.

Pictured (clockwise from top left): BBQ brisket burger using 10-hour smoked meat, **La Fourgonnette** (Paris, France) || Pork belly sandwich topped with an egg yolk cured in honey & jalapeño for 48 hours, **Mexican Seoul** (London, UK) || Chicken thigh brined for 6 hours before frying, **Belles Hot Chicken** (Melbourne, Australia) || Triple cooked cheesy chips with Oglesfield cheese, **Chip Off The Block** (Bristol, UK)





RAW

From poke bowls to sashimi, ceviche to aguachile, the raw (and *almost* raw) revolution is bringing an ultra-fresh option to seafood offerings.

Having already established itself as a restaurant regular, ceviche (and its close cousin aguachile) is popping up on street food menus to satisfy the cravings of curious consumers - packed with zesty citrus and spice for the summer months ahead. Staying in the Pacific, Hawaii's poke appears in its most authentic guise, piled high with raw or seared tuna, while OG sushi comes in traditional and crossover form (tacos are a particular favourite). There are European takes too, pairing raw, seared or cured salmon, scallop and oysters with charcuterie, sea vegetables and classic seafood dressings.

Pictured (clockwise from top left): Ahi tuna poke, **Aloha Fridays** (Los Angeles, US) || Tuna sashimi tostada, **Good Times Tacos** (Newcastle, UK) || Raw scallop, apple, pancetta crumb & chive mayo, **Riley's Fish Shack** (Tynemouth, UK) || Aguachiles (citrus marinaded shrimp), **Tacos Rick-O** (Charlotte, US)

SMOKE & FIRE

Street food and open-fire cookery have always gone hand-in-hand, the interplay of smoke and flame bringing a depth of flavour that simply can't be replicated by other means.

Low 'n' slow smoking is the lifeblood of US BBQ, while fast-searing skewers over hot charcoal is synonymous with East and South East Asian cuisine, and then there's Argentinian asado, Greek souvlaki, and let's not forget wood-fired pizza (the holy grail of pizzaioli)... all of which are represented across street food traders. Whatever the method, there is a common result: umami-rich flavour brought by the open fire process (specifically, by guaiacol and syringol, to get technical) that when applied to meat, fish or veggies, keeps the crowds coming back for more.

Pictured (clockwise from top left): Wood-fired oyster with Perl las blue cheese, Buffalo sauce & pickled fennel, **Sin Nombre** (Cardiff, UK) || Smoked gourmet hot dogs, **Jerros BBQ** (Dusseldorf, Germany) || Al asador Sichuan taco made using asado-grilled whole side of Dexter beef, **From The Ashes** (London, UK) || Lamb shoulder arrosticini cooked over a Japanese konro grill, **Isetta** (Vancouver, Canada)



PACKAGING & PORTABILITY

PERFECTLY PETITE
CUPS OF FUN
STICK IT
LOWER-IMPACT PACKAGING



TFP TREND ALIGNMENT: Evolve Smarter || Savvy Living

KEY REGIONS:       



PACKAGING & PORTABILITY

Street food, by its very nature, is meant to be enjoyed on-the-go. There are no porcelain plates or polished cutlery here, so convenience is key to both the food format *and* the way it's packaged.

Cups offer convenience for more than just drinks, being the perfect size for go-anywhere grazing, and so we see established street food formats being adapted to fit this carrier... including skewers. This format epitomizes street food sensibilities; since the first human decided to hawk their wares from a street food stand, **sticks** have been the carrier of choice. Ticking all the boxes for mess-free **lower impact packaging**, vendors are placing wagyu to watermelon (and everything in between) on this handheld hero. For those who like to graze, there are bitesize formats, as both mini and XXL offerings prove that **size matters** when it comes to getting more bang for your buck.

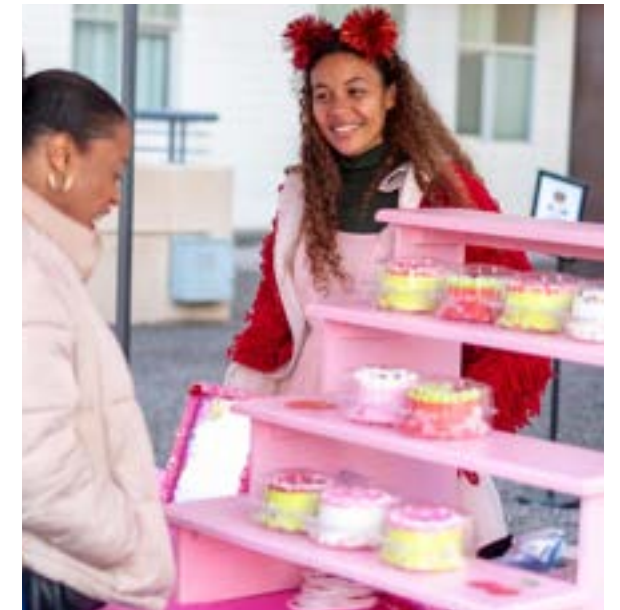
Pictured: Selection of skewered meats, **Kwa Food** (Melbourne, Australia)

PERFECTLY PETITE

When it comes to convenience, size matters. The smaller a product, the more easily portable it will be, but how to scale-down on size without compromising on impact? Vendors are answering this question with perfectly formed, flavoursome and visually satisfying bite-sized offerings.

Integrated packaging allows both food and beverage to be carried in one hand, mini format selection boxes offer a range of flavours in one package, and small but perfectly formed bento cakes deliver the visual impact and flavour of a full-size cake in a scaled-down form. Not only portable, these mini morsels often come in at a lower price point to their full-size counterparts, making them financially accessible too.

Pictured (clockwise from top left): Mini pan-fried bao buns served with an integrated beverage, **Gold Bao** (NYC, US) || Bitesize chocolate chip blondies with rainbow cookie pieces baked-in, **Zola Bakes** (NYC, US) || Mini bento cakes in clamshell containers, **Chez Peachy Mini Bento Truck** (Tucson, US) || Mini pasty and dip selection box, **Mr. Papa** (Canberra, Australia)





CUPS OF FUN

Less bulky than a tray and one-hand friendly, cups are the ideal compromise between accessibility and portability.

As such, vendors are turning to cups as the container of choice for hot *and* cold dishes, and in particular clear cups which show off their contents to full effect. Borough Market's current TikTok darling is a prime example: the viral chocolate covered strawberries are served in transparent cups, encouraging consumers to eat with their eyes as well as their mouths. Other popular presentation formats, such as skewers and bitesize finger food, are seen served in clear cups, as well as layered desserts where their visibly contrasting colours and textures can shine.

Pictured (clockwise from top left): Viral on TikTok, English strawberries & milk chocolate in a cup, **Turnips** at Borough Market (London, UK) || Lumpia & dip in a cup, **4 Corners Street Kitchen** (Las Vegas, US) || Cheesecake served in a cup, **Mlt.** (Abu Dhabi, UAE) || Mini fruit skewer cups, **Delicious Fruit Design** (Los Angeles, US)

STICK IT

Stick formats allow for minimal packaging without the need to compromise on condiments. Sticky, sauce-glazed treats can be enjoyed relatively mess-free, helping to prevent dirty digits while offering go-anywhere portability.

From spicy tteokbokki to sugar-coated tanghulu, on-stick formats are hot property right now, taking cues from East & SE Asian cuisine. Dishes are being adapted to allow for on-stick eating, which not only gives a fun and unexpected twist for the consumer but also means less packaging – and therefore less cost – to the vendor (no knives and forks needed here!).

Pictured (clockwise from top left): Wagyu beef 'burger' skewer using mini smash burgers in place of a bun, **Outbound Station** (Vancouver, Canada) || Beef short rib and shiitake emulsion served on a stick, **Feast** (Belfast, UK) || Mini tteokbokki skewers, **MeeT** (Vancouver, Canada) || Watermelon wedge on a stick, dipped in chamoy & dusted with tajín, **Carnitas Don Claudio** (Las Vegas, US)





LOWER-IMPACT PACKAGING

The impact of human waste is well documented. As such, ultra-sustainable packaging consumables are being embraced. Home compostable containers are the gold standard: 100% recyclable and compostable without industrial processing. Seaweed-based materials are championed for this reason, with some examples being edible too. Grains, also, are blended with hydrocolloids (e.g. agar, xanthan) to produce edible cups, coated with organic polymers to create a natural, compostable hydrophobic layer. While at the other end of the spectrum, recyclable, reusable plastic cups come at a small charge to the consumer, encouraging them to reuse and repurpose the product.

Pictured (clockwise from top left): Soft serve in an edible oat bran & wheat flour wafer cup, **Ceratonia Coffee** (Bulgaria) || Loaded fries served on home compostable paper, **The Cheesy Pig** (Lincoln, UK) || Pizza on a Notpla® seaweed-coated sheet of card, **Crate** (London, UK) || A street food festival company hosting 11 festivals has introduced £2 reusable cups to phase out single use plastics at its events, **Street Food Warehouse** (UK)

PURE COMFORT

FRIES, FRIES, FRIES
CHEESE OBSESSION
FRIED DOUGH
CHICKEN SANDO
TOASTIE, PLEASE
BREAKFAST
CAESAR EVERY WAY
PASTRY PERFECT
NOSTALGIC

TFP TREND ALIGNMENT: Simply Delicious



KEY REGIONS:       



PURE COMFORT

Comfort comes in many forms; for some it's familiarity, for others it's indulgence, for many it's the simple act of treating themselves to something they can't get at home. Whatever the driver, comfort is a tradeable commodity – a fact of which street food operators are well aware...

...and so familiar format **fries** form the basis of flavour plays, while **cheese** brings indulgent comfort by the spoonful. Simple, home-style **toasties** are taken to the next level, bakery and street food meet in **perfect pastry** concoctions, and the **chicken sando** evolves into something altogether extra. **Breakfast** formats bring comfort to the morning feed while the familiar flavours of **Caesar** salad carry through the rest of the day. Global favourite formats show that there's more to **fried dough** than just doughnuts, and the potent pull of **nostalgia** plays to retro-centric offerings steeped in sentimentality and sugar!

Pictured: Marmite & cheddar stuffed waffle soldiers with soft boiled eggs, **Utter Waffle** (London, UK)

FRIES, FRIES, FRIES

As a core street food dish, the importance of fries (or frites, or chips...) cannot be overstated. Whether a simple accompaniment or a standalone offering, fries are being elevated by the application of global flavours and technique, turning the humble fried spud into a true superstar. Operators are frying them in animal fats (kokumi is the new umami, don't ya know!), selecting specific potato varieties known for their flavour and texture, or opting for other tubers such as sweet potato and taro, cutting them extra thick or shoestring thin or shaping them into waffle fries. Loaded fries (and their gravy-laden cousin poutine) are piled high with ingredients inspired by the global larder, offering new tastes with the comfort of a familiar format.

Pictured (clockwise from top left): Taro fries tossed in maqaw salt with braised pork & fried milk cubes, **Small Eats** (Vancouver, Canada) || Butter chicken loaded fries, **Phata-Phat** (Birmingham, UK) || Fries made using only russet potatoes with ranch sauce, **Katoshka** (Singapore) || Chicken tenders & triple cooked fries – both cooked in beef tallow, **Fry The Coop** (Chicago, US)





CHEESE OBSESSION

Few ingredients offer an instant dose of indulgence like cheese, which is why vendors are putting it on... well, everything!

Used in layers, it dials up the umami with two, three or four cheeses in a single dish. Blue and smoked cheeses add body to burgers and BBQ, while creamy mozzarella and dense halloumi bring texture. Cheesy dishes (yes you, mac 'n' cheese) become toppings, as do cheesy maize snacks. Thick, American style cheese sauces are used as drizzles or to completely blanket-cover a dish in the Korean style. And it's not just going *on* dishes, it's also *becoming* the dish, grilled until caramelised before being shaped into a taco shell or replacing sushi nori for a dairy protein hit.

Pictured (clockwise from top left): Pizza topped with cheese sauce, mac 'n' cheese, grated cheddar, Hot Cheetos & Parmesan, **Pizza Punks** (Glasgow, UK) || Beef & bacon burger with thickly sliced grilled halloumi, **La Fourgonette** (Paris, France) || Bacon mac 'n' cheese egg rolls with cheese sauce drizzle, **Shore Good** (New Jersey, US) || Cheese-shell birria taco, **Papi** (Santa Monica, US)

FRIED DOUGH

Dough + fryer = doughnuts. Right? Well yes, but as vendors are showing, there's so much more besides...

Korea's twisted take on the doughnut, the glutinous rice kkwabaegi, is the über trendy choice. Riding high on the popularity of *hallyu* culture, it's being offered in sweet and savoury form, or combinations of both. Churros move away from simple cinnamon sugar coatings to be filled and topped with dairy, chocolate, fresh fruit and botanicals, as do loukoumades, the bitesized Greek dough balls traditionally soaked in honey syrup but more often topped with branded confectionery. Indian jalebi, Hungarian chimney cake and Italian zeppole are all found here, showcasing the versatility of fried dough formats.

Pictured (clockwise from top left): Loukoumades with a selection of toppings, **Lukumades** (Dubai, UAE) || Jalebi & rabri (a condensed milk dessert with jaggery & spices), **Jalebi Walla** (Delhi, India) || Cream cheese, hot honey & garlic kkwabaegi, **Small Mercies** (Auckland, NZ) || Fruit, cream cheese frosting & dulce de leche topped churros, **The Churros Boutique** (Louisiana, US)





CHICKEN SANDO

Deli-style sandwiches are a social media phenomenon. Their multi-layered, photogenic cross-sections and bold flavour combos were made for viral sharing... and the fried chicken sando is proving to be a standout star.

From its origins as a convenience store sandwich in Japan, the chicken sando has evolved to incorporate global fried chicken styles, flavours and bread carriers, moving from a grab 'n' go staple to become an elevated format. It's all about the moistness of the chicken, the crispiness of the coating, and the quality of the bread; add indulgent, imaginative flavour combinations and you have the potential for social media stardom.

Pictured (clockwise from top left): Le Chick Mac: buttermilk fried chicken thigh & 'special sauce' gourmet sando take on a Big Mac, **Dogma** (Paris, France) || Classic fried chicken parm sandwich with vodka tomato sauce & prosciutto, **Untitled Sandwich Shop** (London, UK) || Voted the best chicken sandwich in NYC: piri piri fried chicken in 11 spices, garlic sauce, pickles, pickled cabbage & mint, **Henhouse** (NYC, US) || Teriyaki fried chicken on homemade shokupan with shiso, yuzukosho mayo & radicchio, **Katsusanderia** (Milan, Italy)

TOASTIE, PLEASE

Toastie, jaffle, grilled cheese... call it what you will, the combination of sliced bread, a filling and heat is proving to be a winning one. From the most basic combo of cheese and bread to an entire roast dinner inside two pieces of sliced white, the toastie has gone gourmet, playing host to dish inspired flavour plays and elevated ingredients. What constitutes a toastie is a matter of some debate. Some say it should be made in a press, others are happy with a hot griddle, either way it's replacing the bun as a carrier for chicken and beef burgers, making use of sourdough, shokupan and enriched breads, and even appearing in dessert form. What's more, it's a relatively simple format to create, so ideal for operators working with limited space and budget.

Pictured (clockwise from top left): Chicken tikka nacho toasted sandwich cooked over charcoal, **Toast Trailer** (Cape Town, South Africa) || Korean fried chicken toastie with kimchi & cheese, **Toast** (Windermere, UK) || Cheeseburger toastie, **Angus Brother** (Buenos Aires, Argentina) || Apple crumble jaffle with custard sauce, **G's Jaffles** (Sydney, Australia)





BREAKFAST

Breakfast: the most important meal of the day. Luckily, street food vendors have it covered with morning meals to suit all tastes.

Wraps, sandos and tacos, banh mi, burritos and butties all deliver brekkie in a handheld form, filled with the usual suspects including egg, bacon, sausage and hash browns. But these are more than just bacon buns, they include the kind of spicy sauces, dips and general decadence you'd expect to find on a brunch spot menu. Away from handhelds, loaded fries become loaded hash browns for that breakfast twist, topped with cooked brekkie standards, while those same toppings can be found on breakfast-themed pizza. As scrambled pancakes trend on TikTok, could they be the next big street food breakfast bet?

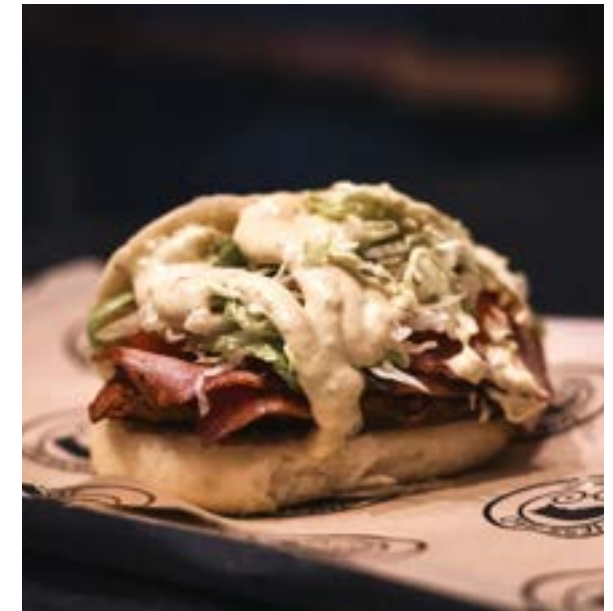
Pictured (clockwise from top left): Cheese-crusted Tex Mex breakfast BBQ burrito, **Big Nath's BBQ** (Bristol, UK) || Sausage & egg biscuit burger with hot honey dip, **Dingo Ate My Taco** (Melbourne, Australia) || Breakfast sando: fried egg, avocado & smoked salmon, **Sando Club** (Paris, France) || Loaded hash brown breakfast tots with bacon, Cumberland sausage bites, beans & scrambled egg, **Brack Burger** (Newcastle, UK)

CAESAR EVERY WAY

How to add an up-to-date twist to an existing format? The answer, it would appear, is to turn it into a Caesar.

Caesar dressing – an emulsion of egg yolk, Parmesan, anchovy, garlic and oil – has been big on socials *and* in restaurants as a go-with-anything dressing with more than a touch of retro appeal. Classically served with romaine lettuce and croutons, it's being used as a complete salad to garnish burgers, toasties and more, while Caesar dressing replaces ketchup and mayo as a topping and condiment. Twists on the format are numerous, replacing romaine with other leaves or playing with the chicken Caesar pairing, using Nashville hot or Buffalo wings and swapping out ranch sauce with Caesar.

Pictured (clockwise from top left): Chicken toastie using shredded chicken in place of bread, filled with Caesar dressing & salad, **Healthy Place** (TikTok, US) || Kale Caesar side dish, **Baby Bull** (North Carolina, US) || Oatmeal coated fried chicken & bacon Caesar bao, **Thess Bao** (Thessaloniki, Greece) || Caesar loaded parmesan fries, **Ramslog** (Copenhagen, Denmark)





PASTRY PERFECT

What happens when you cross bakehouse viennoiserie with street focused comfort food?

More commonly associated with bakeries than street food vendors, these delectable Danishes and enriched dough offerings are appearing at local pop-up markets and food festivals, as bakeries take their wares out of the kitchen and onto the streets. Street food staples like pizza, hot dogs and vada pav are twisted into viennoiserie form (who could say no to a hot dog croissant?), as are deli sandwich fillings such as pastrami, pickles and cheeses. Laminated pastries are the stars of the show here, topped, filled and folded over seasonal produce in sweet and savoury form with multiple crisp, buttery layers.

Pictured (clockwise from top left): Labneh & wild garlic wood-fired pastry, **Sub Rosa** (Virginia, US) || Brisket pastrami, mustard, Gruyere & cornichon pastry, **Zaidy's** (Melbourne, Australia) || Vada pav Danish with potato bhaji, coconut & peanut chutney, **TwentySeven Bakehouse** (Mumbai, India) || Cheesy garlic bread bagel with mozzarella, Swiss cheese & cream cheese, fried garlic & garlic chives, **Tenacious Bakehouse** (Sydney, Australia)

NOSTALGIC

The emotive power of childhood memories fuels the creation of retro-inspired, nostalgia heavy formats.

From breakfast cereal to fizzy sweets, packed lunches to school dinners, the allure of times gone by holds a particular appeal to those of a certain generation... and those who've experienced it vicariously through retro-themed TV shows and movies (remember the *Eggo* boom on the back of *Stranger Things*?). In this way, nostalgia-tinged ingredients are making their way onto menus, bringing a smile to the face and often a rush of sugar to the blood. Breakfast cereals and candy confectionery top drinks and desserts, while childhood dishes are reinvented with modern twists, and the social media trend for cereal and potato chip coated chicken hits street food stalls.

Pictured (clockwise from top left): Strawberry Angel Delight goat's milk gelato, **Oh My Goat** (Gloucester, UK) || Cereal milk iced latte topped with waffle crisp cereal, **Buzz'd Express** (NYC, US) || Doritos fried chicken loaded fries, **Burger Villains** (Canberra, Australia) || Tropical lemonade topped with gummy candies, **Lulu's Lemonade** (Los Angeles, US)



AMERICANA

(FRIED) CHICKEN DINNER
PIZZA PIE
CITY SUBS
GRILLED CHEESE, PLEASE
GOURMET DOGS
REGIONAL BBQ
CALI STYLE

TFP TREND ALIGNMENT: Simply Delicious



KEY REGIONS:       



AMERICANA

With its rich street food heritage, much of which has become globally iconic, the US is incredibly influential.

The formats it has popularised have been taken as a starting point to be tweaked and twisted in new ways. **Gourmet dogs** and **grilled cheese** sandwiches are taken in new directions, using elevated ingredients to blend comfort and craft. Regionality is at the heart of US cuisine, no more so than when it comes to **BBQ**, where cooking styles, sauces and specific cuts all contribute to regional styles. **Pizza** too is moving beyond the Neapolitan to embrace regional formats such as Detroit and New Haven, while operators show that there's more to American **fried chicken** than the stuff from Kentucky. **Sandwich** favourites from US cities, such as the Philly cheesesteak and po'boy, are found in their purest forms or as hybrid offerings, and the sun-kissed flavours of **Cali style** cuisine bring good vibes and vitality to the streets.

Pictured: Philly cheesesteak hoagie roll, Salt 'n' Pepper Food Truck (Los Angeles, US)

(FRIED) CHICKEN DINNER

Fried chicken is an American institution, with almost as many regional varieties as there are US states (okay, that may be an exaggeration). Brines, marinades, rubs, coatings, cooking methods, glazes, spice mixes, sauces... each one is component to a specific style, from the spicy Nashville hot to BBQ dipped Carolina-style, Alabama's white sauce to Hawaiian-style's ponzu.

Regionality aside, new-wave US style chicken blends elements of the old with new flavours, using pickle juice and sweet tea to brine the meat, kefir or coconut milk to marinade, extra crunchy coatings from potato chips and cereals, and elevated ingredients for decadent street dining.

Pictured (clockwise from top left): Louisiana fried chicken loaded fries with Cajun mayo, **Nonna's** (Derry, ROI) || Hawaiian style fried chicken dredged in rice flour & dipped in guava-chilli consommé, **Ai Pono** (California, US) || Sweet tea brined chicken sandwich, **Food Hut RKE** (Roanoke, US) || Nashville hot wings, **Nola** (Berlin, Germany)





PIZZA PIE

There's much more to US pizza than deep dish or thin 'n' crispy...

Most people know NY style pizza with its medium thin crust and big, foldable slices. But what about Detroit style, Chicago (deep dish *and* tavern), New Haven and California styles? In a bid to bring something new and different to the masses, street food vendors are exploring these regional pizza styles, building along the way a dedicated fan base who share their findings on social media, further fuelling the appetite for these 'new-old' pizza styles. Much like their Neapolitan ancestors, each regional style has very specific traits that must be adhered to in order to be deemed authentic, from shape to toppings to cooking method and even the way they're cut.

Pictured (clockwise from top left): New York style pepperoni pizza, **Breadstall** (London, UK) || Chicago tavern vodka pepperoni pizza (very thin & crispy), **Dough the Evolution** (Alloa, UK) || Detroit style pizza with its all-important fricco crust, **The Dough Thrower** (Cardiff, UK) || New Haven 'apizza' – crispy, chewy, charred, and no mozzarella, **Pizza Krush** (Ontario, Canada)

CITY SUBS

Sub, hoagie, hero, spuckie, wedge... whatever you call them, American sandwiches can be inextricably linked to their place of origin.

The most famous of these regional sandwiches are undoubtedly the Philly cheesesteak, po'boy and New York deli. Though the same basic format, what sets them apart is the filling, bread and preparation used. Perhaps fuelled in part by the power of borrowed nostalgia from US TV and movies (just think of *The Bear's* Chicago beef, and Joey Tribbiani's beloved meatball sub!) but more so because they're just plain delicious, these US city specials are finding favour among street food vendors keen to serve up a slice of prime Americana in original or twisted form.

Pictured (clockwise from top left): Po'boys mini variety box, **Po Boys** (Durban, South Africa) || Chicago-style Italian beef sandwich with giardiniera pickle, **Packed Sandwiches** (Llandudno, UK) || Triple Philly cheesesteak, **Phat Phillyz** (Auckland, NZ) || New York deli sandwich, **Sugar Fire** (Seattle, US)





GRILLED CHEESE, PLEASE

As the movie *Chef* showed us, the perfect grilled cheese is a thing of elusive beauty.

The grilled cheese sandwich is a staple of diner cuisine: sliced white bread, toasted on a hot plate, sandwiching melted cheese. Ostensibly simple, it's being elevated through use of premium cheeses and artisanal breads, or entirely reimaged to become a carrier for other familiar formats. The grilled cheese burger is a current favourite among operators, the cheese centre joined by a beef patty (pickles and relish optional), while other takes see kimchi, fried chicken, truffle and more paired with the cheese, alongside soup, gravy and sauce for dunking.

Pictured (clockwise from top left): Grilled cheese & dip combos: Fried Buffalo chicken & ranch, 3 cheese & tomato soup, BBQ brisket & beef gravy – all using sourdough, **Melt** (London, UK) || Kimchi patty grilled cheese melt, **Park & Kim** (London, UK) || Grilled cheese smash burger melt, **Dog Haus** (US) || BBQ beef brisket burnt ends grilled cheese, **Good Times** (Milton Keynes, UK)

GOURMET DOGS

The humble hot dog is having an extreme makeover with lashings of luxury ingredients, global flavours and ultra-indulgent takes on the format.

With Michelin-starred chef Jason Atherton turning his attention to hotdogs and the return of *Bubbledogs* to London, the street food favourite is really hitting the spotlight as a gourmet experience. Far from being left out, street food vendors are ahead of the curve serving imaginative, fully loaded dogs that take inspiration from myriad cuisines, offering an elevated eat at a fraction of the Michelin cost!

Pictured (clockwise from top left): ¼ lb dog with bulgogi & gochujang mayo, **Gochu Gang** (California, US) || £48 Wagyu-truffle & lobster-caviar topped hotdogs, **Bubbledogs** (London, UK) || Truffle bratwurst dog with truffle aioli, truffle mustard & fresh truffle, **Runamuk** (Fremantle, Australia) || 9" smoked pork dog & crispy onions in a garlic butter-soaked bun, **Filthy Dog** (Brighton, UK)





REGIONAL BBQ

Whether you're a Texas devotee or a fan of the Memphis style, there's a street food offering out there to suit.

BBQ aficionados take their love of the craft very seriously, and with so many styles to choose from they're spoiled for choice. The big four (Texas, Memphis, Carolina and Kansas styles) come with their own specialist cuts, smoking methods and sauces; add to that the countless satellites styles and there's enough to keep the most fickle of diners happy. From burnt ends served in Texas toast to pit-roast chicken with Alabama baste, BBQ vendors are firing up their smokers to churn out authentic, slow-cooked cuts of which any pit master would be proud.

Pictured (clockwise from top left): Texas BBQ platter with brisket, lamb chops, hot links & sides, **Filthy Pleasures** (Berlin, Germany) || Carolina gold (honey mustard) BBQ wings, **Sharky's Wings** (New Jersey, US) || Texas-style pecan & apple wood smoked brisket & jalapeño pie, **Far-Que** (Auckland, NZ) || BBQ chicken with California-inspired green goddess sauce (an Alabama white sauce blended with green chilli, coriander & basil), **Priedite BBQ** (California, US)

CALI STYLE

Surf's up! The sun-soaked vibes of California cool are bringing West Coast zest to salads, smoothies, sushi and more!

Fresh, zingy salads featuring a rainbow of colours and the must-have addition of avocado (which, like 'Hawaiian' is to pineapple, has become synonymous with the 'California' label) are defining features of the Cali style diet. Açai bowls, California rolls, and smoothies containing wheat grass, collagen and aloe vera are trademarks of the style: nutrient rich, hydrating and a lighter option. Trend setting stores like LA's *Erewhon* set the gold standard from which others follow, creating Insta-worthy macro-balanced cups and bowls of goodness.

Pictured (clockwise from top left): California cured salmon & avocado poke bowl, **Nori Shed** (Northampton, UK) || 'California' vegan bagel: avocado, cashew cream, radish, roast tomato, basil oil & micro mesclun, **Bagel Brothers** (Barcelona, Spain) || California salad (avocado, sweet potato, bulghur & chickpea) with honey lemon dressing, **GG's** (Chicago, US) || Blue spirulina & matcha latte with added collagen, **48** (Paris, France)



TASTES OF EUROPE

BEST OF BRITISH
SPANISH
ITALIAN
MIDDLE EAST PANTRY
GREEK
FRENCH

TFP TREND ALIGNMENT: Simply Delicious



KEY REGIONS:       



TASTES OF EUROPE

From the shores of the Mediterranean to the Red Sea, European flavours are influencing street food across the world, bringing bright, bold, vibrant dishes and crossover cuisines that blend culinary tradition with exciting hybrid formats.

The **Middle East** and its pantry of fragrant spices offer dippable handheld formats and pungent sauces, while familiar dishes from the neighbouring **Greek** larder are reimagined through flavour plays applied to pizzas, burgers, and other street food staples. **Spanish** dishes patatas bravas and Basque cheesecake undergo similar format and flavour plays, and focus turns to authentic regional **Italian** fare, and its myriad bread and pasta forms, meats, sauces and cheeses. Classic **French** icons are back in vogue thanks in part to a rise in bistro openings, and the retro theme continues as the **best of British** dishes are brought bang up to date for a new generation.

*Pictured: French onion wagyu burger, **Rascal** (Newcastle, Australia)*

BEST OF BRITISH

The Brits have long had a bad rap when it comes to their homegrown cuisine but with dishes like Eton mess, Scotch eggs and (of course) fish & chips appearing on menus the world over, in street food at least, the tide seems to have turned.

As you might expect, menus in the UK are heavy on British dishes, which are being twisted into hybrid forms and mixed with other global formats. Outside of the UK, it's British puddings that are really making a mark. Crumbles and sticky toffee puddings appear as straight-up dishes or translated into ice cream form, while quintessentially British afternoon tea inspires bitesize sweet and savoury treats.

Pictured (clockwise from top left): Eton mess doughnut, **Boneshaker** (Paris, France) || Scotch egg sando, **Cobbles** (Barry, UK) || Fish & chips sandwich with tartare sauce slaw & potato chips, **Food Hut RKE** (Roanoke, US) || Rarebit burger with 6oz patty & Yorkshire ale rarebit, **Rumpus** (Huddersfield, UK)





SPANISH

Iberian cuisine is making a mark beyond the big-pan paella vendors (though they're still very much a thing!) as sweet and savoury Spanish favourites flavour the street food circuit.

Piquant patatas bravas inspires Spanish-style loaded fries, topped with chorizo and morcilla, or comes loaded onto burgers for a spicy inclusion. Where there *is* paella, it's done properly! Using high quality ingredients and classical cooking methods for an authentic taste (and that all-important socarrat). The bikini, Spain's answer to the toastie, has become a trendy dish thanks to the influence of chef Jordi Roca, while sweet churros and Basque cheesecake show themselves to be forever favourite formats.

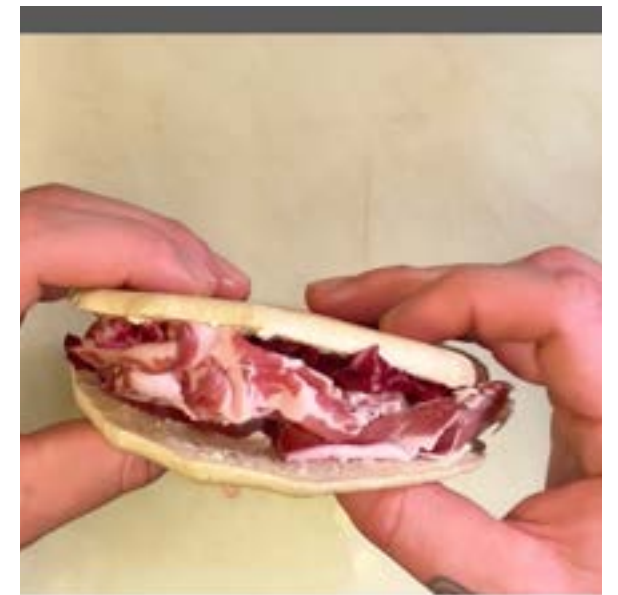
Pictured (clockwise from top left): Authentic Valencian paella using bomba rice, helda beans & free-range chicken, **Rice Minister** (Bristol, UK) || Key lime Basque style cheesecake, **Liberty Smokehouse** (Florida, US) || Double smash burger with patatas bravas croquette & chorizo jam, **Baps** (Belfast, UK) || Cinnamon sugar coated churros with chocolate sauce, **Churros Bros.** (Cologne, Germany)

ITALIAN

The prominence of Italian cuisine across global street food is testament to its enduring appeal and rich larder of ingredients.

Pizza is a street food fixture, with vendors striving for the perfect Neapolitan crust and topping their creations with authentic Italian meats, cheeses and vegetables. The same is true of deli-style sandwiches where Italian *salumi e formaggi* rule the roost, and regional flatbreads such as piadina, panuozzo and Modena's tigella are bringing new life to the sandwich format. Fresh pasta again leans in on authentic flavours while fried pasta brings a fun twist to the format. Regionality is a big call-out with operators specialising in cuisines from specific areas, such as Sicily and Liguria.

Pictured (clockwise from top left): Homemade focaccia with veal & pork stuffing, mozzarella, tomato basil sauce & wild garlic pesto, **Gido** (Paris, France) || Deep fried breaded beef ragu lasagna, **Stuzzi Street Food** (Leeds, UK) || Melbourne's "hottest new sandwich" the tigella – a Modenese flatbread filled with coppa, pickled radicchio & gorgonzola-mascarpone cream, **Emilietta** (Melbourne, Australia) || Limoncello (L) & tiramisu (R) mousse filled Easter eggs, **Poco Sicilian Street Food** (Leeds, UK)





MIDDLE EAST PANTRY

With its use of zesty sauces, creamy dairy and measured heat, the food of the Middle Eastern regions is a firm favourite with diners.

Turkish, Egyptian and Levantine dishes ranging from broad bean falafel to beef shish are paired with pungent sauces such as herbal zhug, garlic-laden toum and fiery shatta, and stuffed into steaming hot flatbreads. As a naturally veg-heavy cuisine it provides a go-to flavour profile for plant-based options, while meat options are cooked over charcoal for that authentic flame-licked finish. The region's larder is now so familiar that crossover dishes are a common sight, mixing Middle Eastern ingredients with classic comfort food like US BBQ, burgers and pizza.

Pictured (clockwise from top left): Egyptian inspired Texan BBQ combining flavours and techniques from both cuisines, **KG BBQ** (Austin, US) || Shawarma spiced cauliflower pizza with zhug & pomegranate, **Jim's Pizza** (Kendal, UK) || Lamb kefte salad box with preserved lemon & amba, **Falafel Salam** (Seattle, US) || Shawarma pita, **Dominion Food Truck** (Frankfurt, Germany)

GREEK

The popularity of Greek food has seen a widespread rise in recent years, across foodservice in general – and street food is no exception.

Gyros vendors are a common sight at street food events, serving charcoal-grilled vegetables and proteins in pita stuffed with tzatziki, salad and fries. There are twists on this, incorporating flavours from other cuisines such as Japanese and Mexican, or serving the component parts as a salad bowl or loaded onto fries. The famous Greek salad lends its ingredients to pizza, sandos and more, while Cypriot export halloumi is a default vegetarian option in burgers, paired with sriracha, kimchi and a host of global ingredients, and whipped feta is the latest must-have dip.

Pictured (clockwise from top left): 'Gyro Hero' pizza with roast lamb, tomato, pepper, feta & tzatziki, **Bravery Pizza** (California, US) || Halloumi popcorn with lemon & thyme infused honey, **The Greek** (Sheffield, UK) || Gyros taco: lamb barbacoa topped with tzatziki sauce, pickled red onion, whipped feta & crispy potato sticks, **Tacos A Go Go** (Houston, US) || Miso roasted sweet potato hummus & flatbreads, **Twisted Gyros** (Portland, US)





FRENCH

The classic flavours of the French bistro are turning up in surprising forms, from bakery to burgers, pizza to puddings, as retro-gastro chic takes hold.

Street food stalls may not seem the most obvious place to find a boeuf Bourguignon or French onion soup, but that's where vendors are mixing things up as au poivre sauces and Niçoise ingredients meet Japanese sandos and loaded fries. The 'au poivre' (or peppercorn sauce) in particular, has grown in popularity thanks to a restaurant trend that's trickled down to street food, and has in turn sparked an interest in wider French dishes. So we see croque monsieur and pain perdu, baked Camembert and crème brûlée appear in classic – and not-so-classic – form across menus.

Pictured (clockwise from top left): French onion & mushroom grilled cheese with Gruyère, **Bill's Sandwich Palace** (Nashville, US) || Croque monsieur croissant burger with Paris ham & cheese, **Easy Burger** (Bangkok, Thailand) || Baked Camembert & focaccia sticks, **Mr. Boney** (Edinburgh, UK) || Burger 'au poivre': smashed black peppercorn beef patty with peppered cheese & creamy peppercorn sauce dip, **Mabel's All Day** (Bismarck, US)

AROUND THE WORLD

MEXICAN

KOREAN

INDIAN

JAPANESE

SOUTH-EAST ASIA

CENTRAL AMERICA

CHINESE

TFP TREND ALIGNMENT: Simply Delicious



KEY REGIONS:       



AROUND THE WORLD

The rise of **Korean** cuisine shows no sign of slowing as it seamlessly melds with other global dishes, creating on-trend formats with huge social media appeal. **Japanese** ingredients are so absorbed into the Western larder that miso, yuzu and teriyaki can be found paired with everything from doughnuts to hot dogs, while the huge variety within **Chinese** cuisine is explored through authentic regional offerings. **Indian** flavours, too, become more nuanced and regionalised, as well as lending an enviable spice larder to crossover formats. The presence of vendors serving Malaysian, Thai, Vietnamese, Indonesian and Filipino derived dishes attests to the considerable influence of **South-East Asia** within the world of street food, while the 'new worlds' to the west, in **Mexico** and **Central and South America**, bring multiple handheld formats brimming with chilli and citrus zing.

*Pictured: 'Thai Pie' pizza featuring grilled chicken, carrot, coriander, and sweet chilli & satay sauces, **Bricks & Birch** (Long Beach, US)*

MEXICAN

Mexico's most famous dishes read like a who's who of street food staples, with tacos being the undisputed star.

The many styles of taco – carnitas, al pastor, birria – are all represented, showing a widespread understanding among consumers around the world of the cuisine as well as the various chilli varieties it uses. The format regularly sees ingredients from other cuisines applied to it (think Korean kimchi or curried chickpeas) with a nixtamalized corn carrier being the defining feature. Tostadas, burritos and nachos feature heavily, again filled with both authentic and crossover ingredients, while horchata (the creamy drink made from tiger nuts or rice) and agave spirit mezcal appear as flavour profiles for sweet formats.

Pictured (clockwise from top left): Birria grilled cheese & dip, **Poncho's Tacos** (Vancouver, Canada) || Cinnamon & mezcal canèle, **El Galactico Taco Truck** (Milan, Italy) || Birria bao buns with strawberry horchata, **Cris & John's Food Truck** (Dallas, US) || Buttermilk fried king prawn tostada, guacamole & pico de gallo, **Shrimp Shack** (Birmingham, UK)





KOREAN

Korean flavours are everywhere, from its famous fried chicken to gilgeori toast, with an ingredients list that has truly permeated street food cuisine.

Kimchi can be found on burgers, pizzas and fries, blended through mayo and spread on sandwiches, while gochujang – the red chilli paste that flavours kimchi – is found in hot wing glazes, mac ‘n’ cheese sauce, even cookies. Bulgogi beef is added to hotdogs and salad bowls for a spicy, meaty kick and tteokbokki rice cakes appear in skewered form glazed in sticky sauces, or as a hybrid take on mac ‘n’ cheese. There’s a real inventiveness surrounding Korean food (just look at snow cheese), which melds effortlessly with Western dishes to produce fun (and funky!) creations.

Pictured (clockwise from top left): Scrambled egg, bacon & cheese gilgeori, **K-Street Toast** (Zurich, Switzerland) || Korean fried yuzu wings finished in a gochujang, soy & sesame sauce, **Thunderbird** (London, UK) || Grilled cheese-topped tteokbokki, **Yum Yum** (Vancouver, Canada) || Snow cheese covered Korean fried chicken, **Fry Baby** (Portland, US)

KOREAN



Pictured (L to R): Street food restaurant mixing Korean and Cajun cuisine, **Kjun** (NYC, US) || Gochujang, strawberry & peanut butter cookie, **Lunchbox Cookies** (Los Angeles, US) || Korean fried chicken thigh burger in a gochujang glaze with kimchi, sriracha sour cream & smoked cheese sauce, **Chick 'n' Sours** (London, UK)

INDIAN

Aside from its copious spice blends which lend their flavour to dishes of Indian *and* crossover origin – think tandoori spiced popcorn chicken or tikka masala fries – the region’s own street food heritage is considerable. Vada pav, the fried potato dumpling sandwich, is a regular sight in street food kitchens, accompanied by brightly coloured chutneys and the obligatory green chilli. The use of lentils and beans means that it’s a common cuisine among plant-based vendors who (along with their carnivorous counterparts) are offering regional dishes from Rajasthan, Kashmir, Hyderabad and beyond. Deep spice and vibrant colour are calling cards as vendors pair dals and curries with fresh green herbs, pomegranate and mango, while fried rice snack bhel puri brings added texture as a garnish.

Pictured (clockwise from top left): Tandoori chicken, roasted pumpkin & paneer bao, **The Bun Mobile** (Brisbane, Australia) || Mung dal dosa with chana chaat, **Horn OK Please** (London, UK) || Matar kulcha breakfast box, **Nukkad Street Eats** (Richmond, Canada) || Gujarati-style vada pav, **Mumbai Street Eats** (Hampshire, UK)





JAPANESE

The influence of Japanese cuisine is exemplified by the adoption of miso, yuzu and matcha as everyday ingredients.

Miso, for example, makes its way into burgers and bakery goods, while matcha latte is a commonplace alternative to coffee. Its own street food dishes, such as karaage, yakitori and takoyaki are offered by specialist vendors, while the flavour and format of (ton)katsu is adapted for use in other dishes, appearing as loaded fries, filled bao or as a flavoured mayo. The coin cake, a cheese-filled pancake popular on the streets of Japan, is currently trending thanks to TikTok, and so is inevitably appearing across global markets, complete with its iconic cheese-pull!

Pictured (clockwise from top left): Aubergine katsu bao bun with yuzu salt fries, **Yum Bun** (London, UK) || Fuji cranberry, Okinawa sweet potato & misugaru rice pudding doughnuts, **The Flour Box** (Seattle, US) || 'Yamashita' plant-based burger with bamboo strips braised in sake, matcha mayo & daikon, **Van Ver Burger** (Turin, Italy) || Cheese filled coin cake, **Bank Of Canaday** (Vancouver, Canada)

JAPANESE



Pictured (L to R): Traditional charcoal grilled yakitori skewers, **Yakitori Yado** (Los Angeles, US) || Honey soy glazed karaage, **Karaage King** (Richmond, Canada) || White chocolate & matcha soufflé pancake, **AM PM** (Hong Kong)

SOUTH-EAST ASIA

Thai food, known for its fresh, fragrant ingredients and sweet-salty combinations, is perhaps the most established from this region – but Vietnam, Malaysia, Indonesia and the Philippines are hot on its heels.

Vietnamese phở and bánh mì appear in traditional and twisted forms, rice and noodle dishes from Malaysia and Indonesia (such as nasi lemak and mie goreng) bring unique flavour, as does rich, spicy rendang which tops fries and fills bao and burgers. Famous Thai dishes like tom yum and massaman become flavour profiles, while more emergent Filipino cuisine brings swavoury flavours featuring pandan and ube, dessert halo-halo and moreish banana ketchup!

Pictured (clockwise from top left): Rendang loaded fries, **Yes Bao** (Perth, Australia) || Chicken bánh mì, **Nori Shed** (Northampton, UK) || Tom yum-inspired chicken wings with lemongrass, chilli, lime & puffed rice, **Home Boys** (Derby, UK) || 'All in' Filipino platter including adobo chicken and sinangag rice, **Adobo** (Frankfurt, Germany)





CENTRAL & SOUTH AMERICA

The many handheld formats from across the Latin American world – arepa, pupusa, empanada, tequeño – are being picked up outside of their home markets, stuffed and topped with slow cooked meats and spiced vegetables.

Paired with vibrant salsa and hot sauce, they share many of the sweet-sour-hot characteristics of Mexican cuisine but are yet to become quite so established. Sauces such as salsa criolla and ají amarillo add piquancy to roasted meats and fish, while chimichurri has become a true global ingredient, pairing with pizzas, viennoiserie and more.

Pictured (clockwise from top left): Cheese arepa, garlic & herb butter, pebre sauce, **Cahita** (Liverpool, UK) || Alfajores gelato with chocolate dulce de leche & shortbread, **Gelato Messina** (Melbourne, Australia) || Tequeños (cheese filled fried pastry sticks) & guacamole, **The Peruvian** (Edinburgh, UK) || Chimichurri steak loaded fries, **Beef On The Block** (London, UK)

CHINESE

China's popularity as a globally enjoyed cuisine is matched only by that of Italy, and with an expanse of almost 10 million km² the regional variation within it is huge.

It's that regional variation that's being explored by chefs keen to bring something different to the table. Takeaway style food, based mainly around Cantonese, remains widespread (dim sum, char siu) but more interesting is the use of other provincial flavours, such as Sichuan's mala spice or even spicier Hunan cuisine. Hand-pulled noodles (a specialty of Xi'an) can be found paired with vinegar-heavy sweet, hot and sour flavours... and speaking of sweet, candied fruit on a stick, or tanghulu, is enjoying a moment in the spotlight as this street food treat is replicated on TikTok posts across the world.

Pictured (clockwise from top left): Tanghulu, **Hulu Hulu** (Burwood, Australia) || Hunan pork rice noodles, **Silky Kitchen** (NYC, US) || Char siu pulled pork bao with miso slaw & sriracha mayo, **Little Bao Boy** (Leeds, UK) || Hand-pulled Szechuan garlic noodles & green scallion pancake, **Bang Bang Noodles** (Los Angeles, US)



DESSERTS & DRINKS

RETRO SWEET
THIRST QUENCHERS
CHEESECAKE
TWISTED TRAYBAKES
ICED TEA
NICE CREAM



TFP TREND ALIGNMENT: Simply Delicious || Savvy Living

KEY REGIONS:





DESSERTS & DRINKS

Sweet-toothed diners are well catered for too, as tried and tested favourites are given a makeover using on-trend flavours, or reimagined as delightfully kitsch mash-ups.

As is so often the case during periods of economic downturn, consumers and producers alike turn to the comfort of familiarity, which sees formats emerge that carry within them a certain degree of nostalgia. There are **retro sweet** offerings that take well-loved formats and flavours, twisting them into something new, while **twisted traybakes** and **nice cream** treats both elevate simple formats into something altogether more indulgent. Crowd favourite **cheesecake** pops up in various guises – baked, chilled and Basque – to top, flavour and fill baked goods, or shine as a standalone star. And summertime **thirst quenchers** such as agua fresca, slushie, lemonade and **iced tea** make the most of seasonal ingredients to produce deliciously vibrant, naturally flavoured tipples.

Pictured: Baklava cookie, Chip City Cookies (US)

RETRO SWEET

Old school desserts and childhood favourites are inspiring playful reinterpretations of well-loved formats.

Nostalgic school dinner dishes like rice pudding and Manchester tart are updated through imaginative flavour combinations and format mash-ups, while desserts from the retro repertoire (think Eton mess, sticky toffee pudding, peach Melba,) act as flavour inspiration for waffles, doughnuts, crêpes and more.

There is an element of kitsch at play, as desserts come garnished with a rosette of whipped cream, or topped with sugar sprinkles or a glacé cherry, appearing no-frills but with a flavour that's anything but.

Pictured (clockwise from top left): 'School cake' deep dish cookie (top), **Sweet Treats** (Kendal, UK) || Peach Melba doughnuts, **Brammibal's** (Hamburg, Germany) || 'Gammeldags æblekage' – reimagining a classic Danish apple pie using apple sauce, macarons, whipped cream, and currant jam, **Nordic Hotdog** (Copenhagen, Denmark) || Coconut rice pudding with berry compote, **Brothl** (Melbourne, Australia)





THIRST QUENCHERS

When the sun comes out, vendors reach for the ice and stock those hydration stations with zesty, fruity and tropical-tinged beverages to quench the collective thirst.

Originating in Mexico, agua fresca (a drink made from fresh fruit, lime juice, water, a sweetener like sugar or agave, and often fresh herbs, like mint) ticks all the boxes for zingy impact, with naturally-derived bright colour and flavour. Lemonades – simple, or blended with seasonal fruits and botanicals – offer similar appeal, with operators creating their own home-made concoctions. Ramping up the ice content, flavoured slushies and frozen lemonades come in on-trend flavours such as pineapple, watermelon and dragon fruit.

Pictured (clockwise from top left): Passion fruit, lime, coconut & butterfly pea flower agua fresca, **Piada** (US) || Vimto boba slushie, **Doh** (UAE) || (L to R) Raspberry, pineapple-coconut, lavender, mojito-mint shaken lemonades, **Outbound Station** (Vancouver, Canada) || Homemade strawberry & elderflower lemonade, **Feast** (Belfast UK)

CHEESECAKE

This delectable dairy do-it-all is being used to top, fill and flavour... well, pretty much everything, as well as taking the spotlight as a standalone star.

As a filling, it can be found in viennoiserie and fried doughs, and as a topping it's whipped and used in place of cream cheese icing, or blended through cream and custard. As a standalone format, it can take the form of set (non-baked) cheesecake, paired with fresh seasonal fruits and confitures, caramels, chocolate and confectionery – and helpfully, as a non-baked dessert, it can be both prepared and served in the same container. But let's not forget the sensation that is Basque (aka San Sebastian) cheesecake, with its creamy texture and highly satisfying caramelized crust.

Pictured (clockwise from top left): Basque cheesecake mochi doughnut, **Mochido** (Vancouver, Canada) || Biscoff cheesecake filled croissants, **The Cheesecake Kitchen** (County Durham, UK) || Set strawberry cheesecake in a cup, **Baste** (Oxford, UK) || Raspberry fried cheesecake burrito, **Tacos Rick-O** (Charlotte, US)





TWISTED TRAYBAKES

Tray bakes such as brownies, blondies, shortbreads and cereal cakes are the perfect size and shape for one-handed snacking.

What's more, they're easily transportable (thanks to their stackability), and can be made in bulk before portioning to size, meaning that sweet treat vendors can prepare them with relative speed and ease, without need for large commercial ovens. As such, these one-pan wonders are being twisted and hybridised, with the latest trending flavours fresh from TikTok applied to them. With so many possibilities around flavour and format mash-up, vendors can (and do) create their own unique combinations offering affordable indulgence in a delicious, nostalgia-tinged package.

Pictured (clockwise from top left): Chocolate s'mores bar, **Dollies** (Leicester, UK) || Salted caramel cornflake cookie, **Cookie Mumsters** (Birmingham, UK) || Jammie Dodger blondies, **Kookie Ko** (Norwich, UK) || Milk chocolate & pistachio cookie millionaire, **Bake It Easy** (Glasgow, UK)

ICED TEA

This warm weather favourite is being given a makeover as vendors apply seasonal flavours and imaginative twists to a summertime classic.

Fragrant botanicals such as lavender, hibiscus and rosehip add a floral touch to sweetened black tea, while the sweetness itself commonly comes from honey or cane sugar. Fruit pairings follow the seasons and local regions, with berries and stone fruits – think apricot, raspberry or peach – commonly used, alongside a dash of lemon for maximum refreshment.

Format plays bring slushie versions for the hottest of days, and 'grown up' riffs with added vodka, gin or Bourbon to spice things up (which some vendors are taking literally by adding chilli heat).

Pictured (clockwise from top left): Apricot & hot honey sweet iced tea, **Wide Awake** (Tacoma, US) || (L to R) Peach iced tea and dragon fruit & mango iced tea, **Sally's** (Preston, UK) || Wild strawberry, rosehip, hibiscus & raspberry leaf iced tea, **Local Roots** (Greensboro, US) || Arnold Palmer (iced tea & lemonade blend) slushie, **Perch & Putt** (Virginia, US)





NICE CREAM

Gone are the days of a simple ice cream scoop in a wafer cone, as modern street food desserts have become every bit as adventurous as their savoury counterparts.

Swavoury combos abound as soft serve, gelato and frozen yoghurt are paired with savoury tinged jams and caramels. There are indulgent twists on the classic affogato, and multi-layered, multi-textured frozen sundaes. Ice cream sandos make use of multiple carriers, from wafers to waffles, shortbreads to cinnamon buns, and come semi- or fully dipped in chocolate, caramel or icing. With modern machines able to churn mixes with great efficiency and speed, vendors are able to frequently change the range of flavours on offer.

Pictured (clockwise from top left): Ice cream 'club sandwich': sponge, vanilla milk ice cream, peach & tomato jam, basil gel, **Happy Endings** (London, UK) || Peanut butter cookie dough crunch affogato sundae, **Caffé Panna** (NYC, US) || Pineapple upside down cake vegan soft serve sundae with miso caramel, **Vaca's Creamery** (Chicago, US) || Cardamom cake, green apple cinnamon semifreddo & green apple jam frozen sando, **Beaucoup Bakery** (Vancouver, Canada)

HEALTHY(ISH)

CAULI POWER

5-A-DAY

BIG SALAD ENERGY

LOADED SOUP

GRAINS, LENTILS & PULSES

FREE FROM

LESS CARBS, MORE PROTEIN

THE NEXT POKE?



TFP TREND ALIGNMENT: Simply Delicious || Empowered Self

KEY REGIONS:





HEALTHY(ISH)

Street food may not always have had the greatest reputation when it comes to healthy eating, but things are changing. As we, the consumer, grow increasingly aware of the importance of a balanced diet, so vendors recognise the need to offer a more nutrient dense menu to help us on the way to our **5-a-day**.

Grains, lentils and pulses offer protein, fibre and carbs in one, squaring out those daily macros, or for those looking for a **protein** fix with less of the starches there are tweaked takes on familiar formats to deliver just that. **Cauliflower** is proving a favourite ingredient for meat-free dining, a conduit for flavour at an attractive price point for vendor and vendee, while **loaded soups** and **big salads** offer indulgence with less of the guilt. When it comes to salads, the hunt is on for **the next poke** with cold noodles and junk food salads offering a potential answer, and with food intolerances on the rise so too are **free from** options.

Pictured: Smoked cauliflower loaded fries, **Stag Bites The Hog** (Alloa, UK)

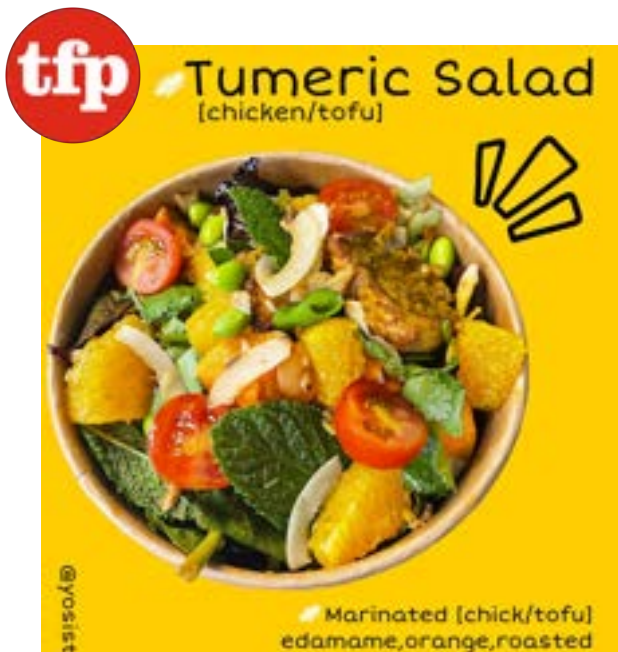
CAULI POWER

The cruciferous vegetable is a standout ingredient among plant-focused vendors, thanks to its ability to carry strong flavours combined with its relative lack of expense.

Cauliflower is used in dishes with flavour profiles as diverse as Italian, Korean, Mexican and Greek, appearing as a whole roasted crown, crisp coated florets or puréed down into a sauce, in all cases pairing with bold spice and umami-rich ingredients. High in vitamin C and a good source of potassium and fibre, cauliflower packs some impressive nutritional stats, but it's the earthy, slightly mustardy flavour and firm texture that are the real draw, able to stand up to long cooking times but equally as delicious in its raw form.

Pictured (clockwise from top left): Vegan parmesan cauliflower poutine, **Poutine Brothers** (Los Angeles, US) || Cauliflower katsu pizza, **Barebones Pizza** (Merthyr, UK) || Roasted cauliflower & tahini pita, **Miznon** (Melbourne, Australia) || Cauliflower curry xiaolongbao with serrano chilli, potato & goji, **XLB** (Portland, US)





5-A-DAY

A balanced diet needn't mean a boring diet, as vendors offer flavour and nutrient-packed options in convenient formats.

Buzz ingredients such as dragonfruit, spirulina, kale and watermelon – each loved for their hydration or vitamin-rich properties – can be found here in both edible and drinkable form. Designed to provide a solid base of sustenance throughout the day, these salads, smoothies and juices offer health-aligned snacking on the go. Most contain a number of raw or minimally processed ingredients in a single serving, while others (such as watermelon juice) extol the virtues of a single ingredient, often backed up by a flurry of interest on social media channels.

Pictured (clockwise from top left): Marinated chicken, edamame, orange, sweet potato, tomato & herb salad, **Yosi Street Food** (Belfast, UK) || Daily dose smoothie: apple, pear, strawberry, kale, mango, peach & banana, **Jamba** (Singapore) || Super salad cup containing couscous, avocado, aubergine, broccoli, pepper & pickled cauliflower, **Vantastic Food Truck** (Madeira, Portugal) || Watermelon juice with hydration, blood sugar management and detoxification claims, **Black Seed Brothers** (NYC, US)

BIG SALAD ENERGY

Forget the 70s style salad: a few leaves of insipid iceberg with a wedge or two of salad box stragglers. Modern salads are a joyous affair, vibrant and varied, with big salad swagger! We're talking spoon salads, box salads, salads that pack a punch – multiple diverse ingredients spanning all the macronutrients, brought together in a multi-coloured, multi-textured bowlful of goodness. Buddha bowls and poke-style formats are a prime example of this, as are the Med and Middle Eastern salads so beloved of the brunching scene. Fruits, seeds, nuts, grains and proteins mix with punchy dressings full of fragrant spice, herbs and heat to create salads to satisfy the biggest of appetites.

Pictured (clockwise from top left): Tuna salad bowl with dressing, **Matty's Kitchen** (Hertfordshire, UK) || Persian jewelled rice salad with pistachio & pomegranate, **Tehran Truck** (Berlin, Germany) || Miami salad: Buffalo tenders, mixed leaves & blue cheese dressing, **Coop Kitchen** (Somerset, UK) || Smoked salmon buddha bowl, **Stag Bites The Hog** (Alloa, UK)





LOADED SOUP

This winter warmer is being piled high with two, three, four or more toppings to create a true meal in a bowl that can be enjoyed throughout the year.

In regions with more changeable climates (we're looking at you, UK) it can be hard to predict how the weather will behave: sunshine one day, cold rain the next. There, soup offers a delicious and nutritious meal option with limitless flavour possibilities. Ingredients are diverse, taking in flavours from Asia, North Africa and Europe, with homegrown favourites like the US's loaded potato soup (baked potato toppings applied to a potato soup) sitting alongside multi-textured pho, minestrone, dal and more, all served with spoonfuls of toppings for guilt-free indulgence.

Pictured (clockwise from top left): Tomato soup topped with crisp kale, pesto, croutons & cheese, **The Hidden Hut** (Cornwall, UK) || Cauliflower dahl with bhaji pieces, pickled onion, raita & coriander, **The Hidden Hut** (Cornwall, UK) || Cheesy potato soup loaded with garlic breadcrumbs, cheddar, bacon, sour cream & chives, **Vanguard** (Milwaukee, US) || Fillet steak & ginger pho broth, **And Broth** (California, US) || French onion gratin, **Soup Truck** (Fukuoka, Japan)

GRAINS, LENTILS & PULSES

The dietary benefits of these food groups are well reported, as are their sustainability credentials, but that means little unless they taste great too. Luckily, vendors are making sure that flavour is at the top of the agenda.

As awareness regarding the importance of dietary fibre grows, there has been a noticeable rise in the number of bean, millet and non-wheat grain dishes on offer, commonly flavoured using South Asian and Middle Eastern spice mixes. In addition to fibre, these dals, curries, fillings and coatings bring impressive protein and mineral content, often with dairy and gluten free credentials for herbivorous and omnivorous diners alike, and as a relatively inexpensive ingredient they offer great value to both operator and consumer.

Pictured (clockwise from top left): Potato, leek, candied onion & royal red quinoa croquette, **Agape Organic Food Truck** (Sydney, Australia) || Spicy chickpea & beef dumpling 'nirvana bowl', **Mandala** (London, UK) || Coral lentil coconut curry with roasted cauliflower & ginger rice, **Exki** (Belgium) || Imli chole (black chickpea) puri, **The Hungry Gecko** (Liguria, Italy)





FREE FROM

With food allergies on the rise, vendors are answering the call for meals that are both delicious and diet-friendly.

According to the UK Food Standards Agency, 1 in 20 adults has a clinically confirmed food allergy, while the WAO estimates that 10% of the worldwide population could be affected. As a result, vendors are offering allergy-friendly meals free from one or more of the 14 major allergens. Most common amongst these are gluten, dairy, nut and sulphite -free foods, with these claims being highlighted on menus and social media posts. Popular street food favourites are tweaked to produce allergy-safe versions with some vendors gaining accreditation from associated bodies to confirm their 'safe space' status.

Pictured (clockwise from top left): A selection of baked goods, all 'free from the top 9 allergens' including wheat, nuts & dairy, **Allergy Free Bakery** (Michigan, US) || Burgers made using nitrate-free bacon, **Beef & Liberty** (Hong Kong) || 100% gluten free fried chicken cooked in a GF fryer, **Sneaky Burger** (Sydney, Australia) || Pop-up street food festival dedicated to gluten, dairy and refined sugar-free dishes, **Free From Festival** (UK)

LESS CARBS, MORE PROTEIN

Do you even lift, bro? While protein is understandably a big deal in the fitness world, the more general benefits of a protein-rich diet are being explored through street food.

In the wake of the keto boom, some consumers are turning to lower carb, protein rich foods free of the burden of a proscriptive diet. This doesn't mean 'health' food – far from it – the dishes on offer are just as indulgent as any other street food. Tacos that forsake the tortilla for a pure cheese shell, for example, or a full pastry pie formulated to ramp up the protein and fibre while retaining its essential 'pie-ness'.

Pictured (clockwise from top left): Lettuce cup burger replacing the bread bun with lettuce leaf wrap, **Scoob's** (Sydney, Australia) || Caramelised cheese shell tacos, **Tacos Los Iñiguez** (California, US) || Tradie pie: developed alongside a sports nutritionist to deliver all-day sustenance with 40% less carbs than a regular pie, 45% RDA of fibre & 20g of protein, **Harry's Café de Wheels** (NSW, Australia) || Startup serving high protein street food & drink, **Truck Of Protein** (Berlin, Germany)





THE NEXT POKE?

Poke bowls have been a star of the street food salad world for some time, but now formats are appearing that may just claim the poke crown.

Chilled noodle bowls are a strong contender. This cold wheat or rice noodle format is popular on the streets of SE Asia and has begun to appear in other markets, combining the comfort of carbs with multiple meats and veggies. Over on social media, chopped salad bowls have proven so popular that a UK supermarket has trialed a whole aisle dedicated to the format. Here, chosen salad ingredients are chopped together to ensure a mix of flavours in every mouthful. An extension of this is the junk food salad. Born of TikTok it reimagines street food favourites in salad form, blending health and hamburgers in equal measure!

Pictured (clockwise from top left): Chilled udon noodle bowl with tempura broccoli, smoked tofu, peanut & teriyaki dressing, **Mango** (Berlin, Germany) || High protein 'Big Mac' salad, **@ashleylamego** (TikTok, US) || One bowl mixed Greek protein salad bowl, **@emthenutritionist** (TikTok, UK) || UK supermarket chain has introduced a 'pick & mix' salad aisle inspired by the TikTok craze for healthy salad creations, **Tesco** (UK)

SUMMARY

Street food is evolving. The modern street food scene is a vibrant, experiential space – a world away from the insipid roadside burger experience of yesteryear.

Present day traders bring formats and flavours from across the world, introducing an increasingly adventurous consumer base to new food experiences, more-often-than-not in a space that offers multiple cuisines from multiple traders in one easily accessible location.

Such dynamism is attracting attention from outside of the traditional street food sphere, as classically trained chefs turn their hands to street-level trading, whether in one-off pop-ups or as an entirely new career direction. The result is an industry sector that is alive with fresh ideas and talented cooks.

Fun lies at the heart of this scene, not only due to the relaxed, extremely informal nature of its service but because of the freedom the sector allows its traders. With much lower overhead costs compared to a bricks-and-mortar eatery, chefs can afford to experiment – indeed, with other traders pitched up next to them, they're *forced* to experiment – creating dishes that meld influences from multiple global cuisines into attention-grabbing, Instagram-able forms ready for social media stardom.





CHRISTMAS 2024

In this seasonwatching **Christmas** report we analyse thousands of touch points across global Christmas menus including QSR, fine dining, casual, cafés, bakeries and cocktail bars, as well as seasonal retail launches, to identify the big trends and future foresight.

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INTRODUCTION

Sustainability, hedonism, premiumisation and convenience have been dominant drivers behind trends this year. Perhaps it's no surprise, then, that all of these have come to define the festive season of 2024.

Mealtimes shift away from the traditional definition as a rule, further blurring the lines through the indulgence that Christmas brings. The trend of 'snackification' sees an equally hedonistic approach to grazing, borrowing from traditional dishes on which consumers put their own spin. Pre-existing concerns surrounding the environment and sustainability see consumers spending more on rare and native breeds of pork, beef and game, often usurping the place of turkey with a little luxury. Meanwhile, vegetables are promoted from sides to stars of the show – including salads – and burgers, fries and bao all get festive-fied. Brands make a push to play on the spirit of Christmas, with experiential marketing supplementing sales (like a pop-up hole-in-the-wall offering mince pies, or a bottomless pigs-in-blankets restaurant), while gift hampers cater to self-care alongside sweet treats. Yuletide tipples play with traditional tropes and the cost of living encourages us to make things from scratch. Global flavours ensure an endless supply of inspiration, along with some more expected flavours and formats switching up places.

INFLUENCES

The following slides represent the four key overarching themes that influence this category:

- **Snackification**
- **Peace of Mind**
- **New Wave Adverts**
- **Festive Aesthetics**





SNACKIFICATION

As consumer lifestyles evolve, so too do their eating habits.

Hybrid working and flexible hours drive a need for flexible dining options; cue snackification, which sees consumers move away from three square meals a day in favour of a 'lots of little' approach.

Full-size formats are scaled down for all-day grazing and breakfast favourites become anytime options, as both foodservice and retail take an anytime, anywhere approach to new product development. These dining habits remain during the holiday season, and so bitesize and mini formats have become a prominent feature on consumers' Christmas dining tables.



PEACE OF MIND

A happy Christmas is a stress-free Christmas.

A survey by Mental Health UK found that 84% of respondents consider the festive period the most stressful of the year. With festive fatigue a very real concern, consumers are looking for ways to lessen the burden, with Christmas catering being high on the list.

From ready-to-eat supermarket products to Michelin-starred takeaways, cook-at-home meal kits to 3-ingredient TikTok hacks, there have never been more options available – in ways to suit all budgets – to take the strain off the big day both in and out of home.



NEW WAVE ADS

Christmas campaigns for a digital generation.

A poll by Gumtree found 72% of 16-24 year olds were 'very likely' to purchase a product following social media exposure, compared to 56% via TV ads – a statistic echoed (rather surprisingly) by baby boomers. So we see an uptick in brands turning to the socials for creative Christmas promotions. Ads are formed as fun, irreverent sub-minute Reels, as standalone or companion pieces to traditional media. AI allows visually impressive content with much lower production costs (see Coca-Cola's 2024 short), while consumer engagement is piqued via serialised storylines (such as Waitrose's 'whodunnit?' cliffhanger ad).



FESTIVE VISUALS

From trad chic to disco kitsch, for this year's Christmas aesthetic – anything goes!

The red and green colour palette is out in force, gracing everything from supermarket packaging to artisan viennoiserie, while baubles, snowmen, stars et al make their annual appearance

...but that's only half the story, as this year they're joined by a have-it-your-way approach that sees deliberately mismatched colours and shapes come together in deliciously kitsch combos. Acid 'Brat' green dials up the dayglow (bolstered by Wicked and Grinch hues), while 70s and 90s nostalgia bring bold imagery and disco pop sensibilities.



FUTURE OPPORTUNITIES

A trend is where there is growing evidence of something new.

An opportunity is where consumer demand is significant yet there is no established trend yet.

Christmas is a time of celebration, when the normal conventions of daily life are put on hold for a period of fun-filled festivities. This is especially true during times of social and economic uncertainty, when we often turn to frivolity as a temporary escape from everyday concerns; a time many find themselves in currently. This desire to embrace the fun side of life has seen an uptick in kitsch, retro, tongue-in-cheek aesthetics being adopted through décor, packaging and product presentation. It follows the established use of food as a form of escapism, also playing into a Gen Z/Millennial taste for retro culture, that remains largely untapped in mainstream foodservice and retail.

Small touches of perceived luxury can help persuade consumers to spend just a little extra for an added benefit. This is apparent through the mainstream use of rare breed meats in sausages, burgers, roasting joints, etc. and wagyu's move from specialist supply to supermarket shelf. It speaks to a wider desire for quality through specificity – of heritage, of traceability, and of sustainability – which signifies a superior product for the consumer and the environment. The next step in this evolution is the use of wild meats, which are, as of yet, confined to more specialist applications but which have potential to engage consumers looking for something new, at an affordable price point, that allows them to make a conscious choice around environmental impact.



KEY INGREDIENTS / FLAVOURS



EARTHY

Beetroot
Brussels sprouts
Coffee
Hazelnut
Matcha
Pistachio
Whiskey



SALINE

Caviar
Roe sauce
Salmon belly
Smoked salt



CREAMY

Brie
Burrata
Camembert
Cardamom butter
Custard
Eggnog
Goat cheese
Goat's curd
Gruyere
Macadamia cream
Parmesan
Raclette
Ranch
Rice vanilla pudding
Stilton



UMAMI

Bone marrow
Duck fat
Miso
Parmesan
Smoked salmon
Tahini
Truffle



TART & SOUR

Berry powder
Cherry
Cranberry
Lemon
Lingonberry
Orange
Passionfruit
Pickles
Pineapple
Quince
Sorbet
Yuzu



KEY INGREDIENTS / FLAVOURS



ALCOHOL

Amaro
Apple brandy
Espresso martini
Mince pie old fashioned
Mulled wine
Negroni
Port
Sherry
White rum
White wine
Baileys



SPICES

Chai spice
Cinnamon
Clove
Cloves
Curry oil
Ginger
Nutmeg
Peppermint
Pumpkin spice
Star anise
Tandoori
Turmeric



SWEET

Advocaat
Amazake
Apple
Caramel
Caramelised onion
Cheesecake
Chocolate
Coconut
Cookie
Dates
Gingerbread
Honey
Hot honey
Maple caramelised pecans
Marshmallow
Sticky toffee
Tonka bean



HERBAL

Coriander
Dill
Jasmine
Juniper
Mint
Parsley
Pine/Spruce
Rosemary
Sage



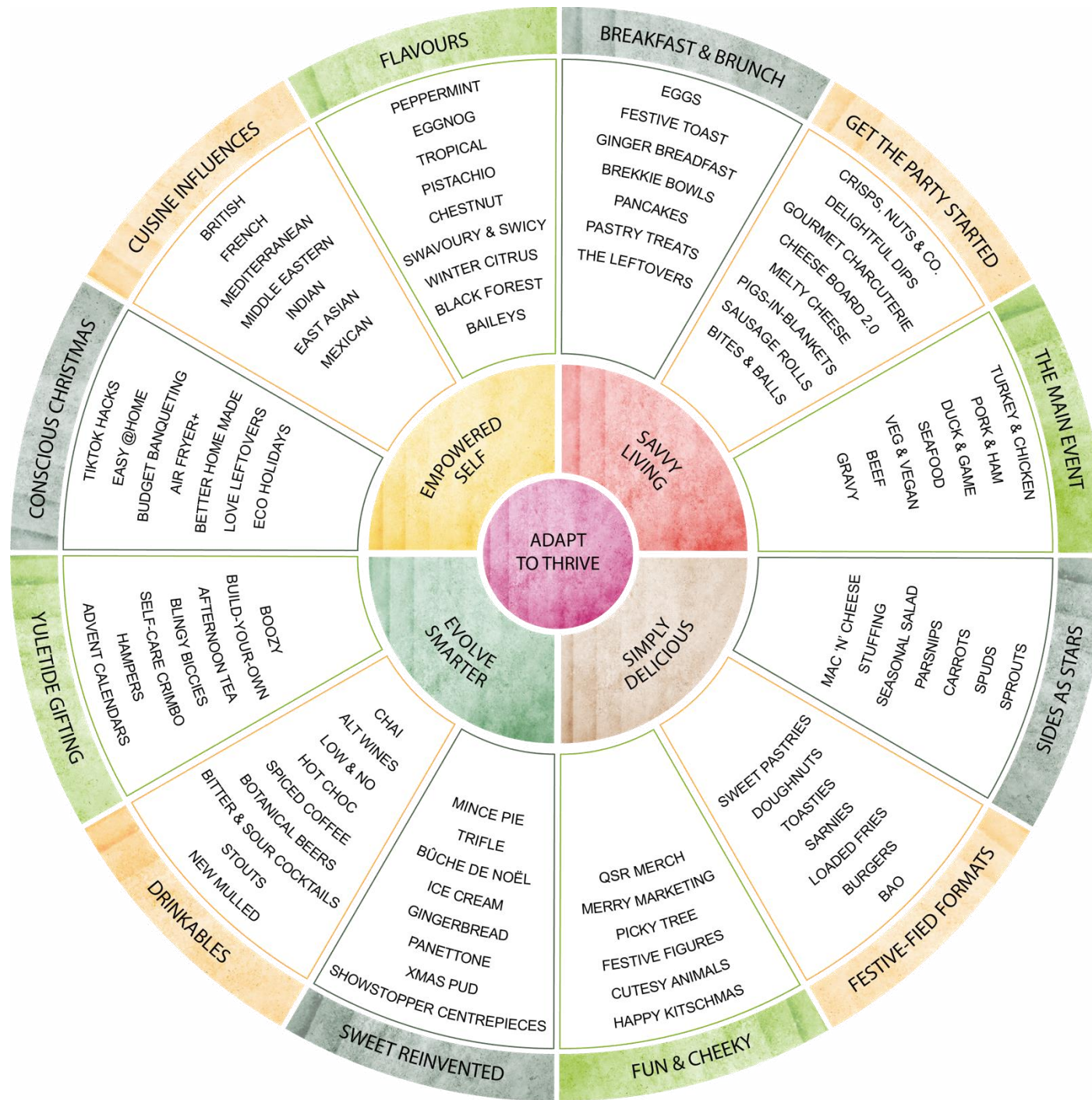
SWAVOURY

Maple butter mayo
Spiced cranberry



CHRISTMAS TRENDS

This wheel shows the trends we have identified for this report, through our research across Christmas.

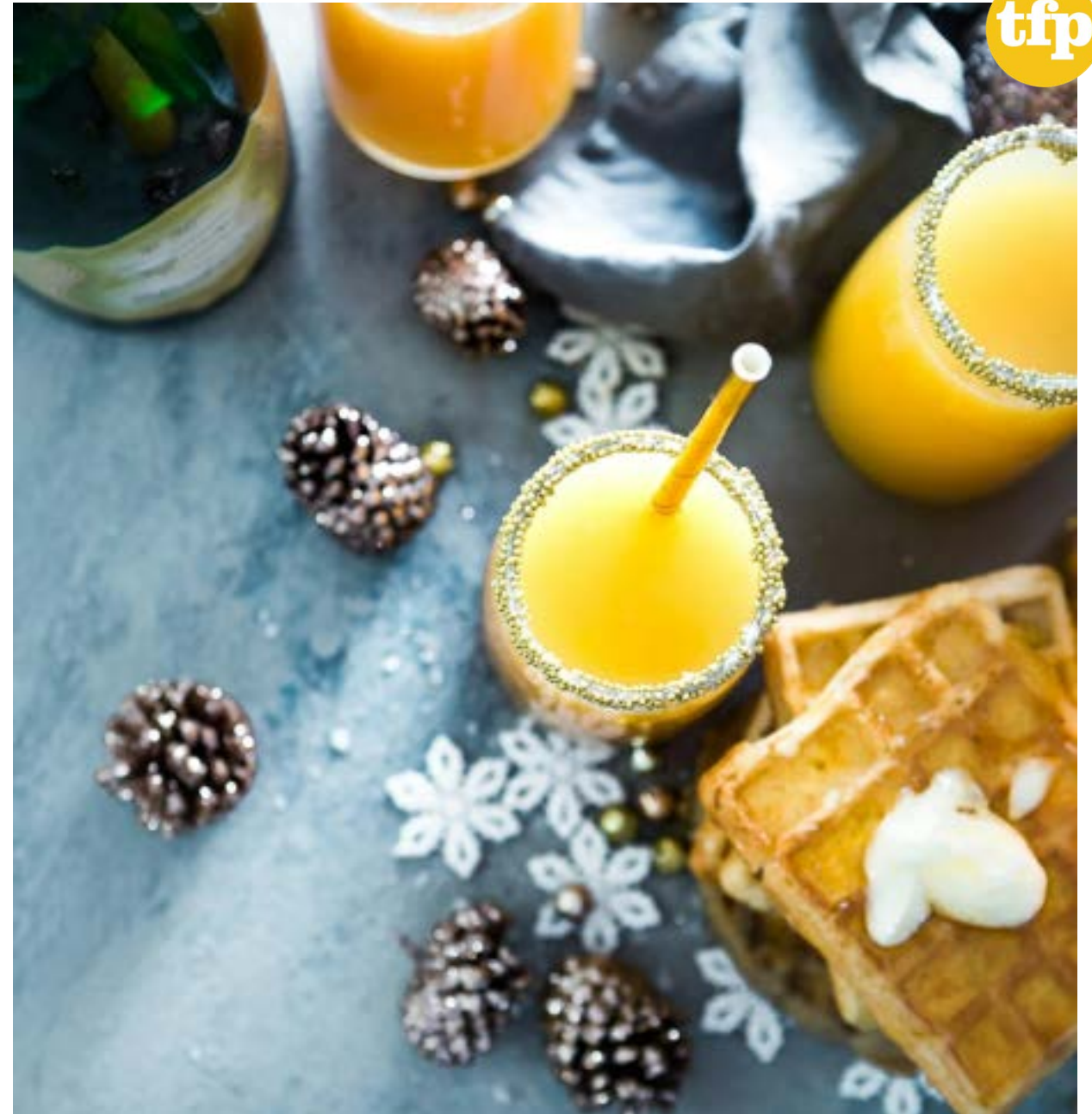




BREAKFAST & BRUNCH

Perhaps the most exciting part of Christmas is when the alarm rings, marking its arrival *(unless it's an alarm in the form of eager children at 4 am!)*.

And, whether you prefer to open presents first or enjoy breakfast before diving into gifts, the season offers a range of delights to keep us energised until the main event! Eggs are a classic breakfast and brunch menu item that can take on a festive twist. Additionally, a sweeter breakfast is desirable alongside our advent calendar choccy and festive-spiced tea and coffee. For instance, festive French toast drizzled with cinnamon honey and gingerbread-inspired pancakes - with an extra serving of whipped cream, please! There's also opportunity to use leftovers for those 'what day is it again?' moments between Boxing Day and New Year. Why not use the last remaining cheese from cheeseboards stuffed inside croissants or enjoy Yorkshire pudding toasties? *(If there's any remaining the next day, mind.)*



BREAKFAST & BRUNCH

EGGS

FESTIVE TOAST

GINGER BREADFAST

BREKKIE BOWLS

PANCAKES

PASTRY TREATS

THE LEFTOVERS



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:





EGGS

♪ How do you like your eggs on Christmas morning? I prefer mine in the shape of a tree! ♪

Alright, we'll save the singing for Christmas carols!

Eggs are a staple breakfast item year-round, so it's no surprise they're getting a festive twist for Christmas morning and beyond. The main focus here is convenience, as let's be honest - most of us don't want to spend all day cooking and cleaning! As such, the increase in 'make the day before' varieties trend. For example, breakfast casseroles and croissant breakfast sandwiches can be prepped ahead of time and heated up in just a few minutes. Additionally, Christmas tree-shaped devilled eggs can be made ahead of the holiday rather than on the busy day itself. Restaurants are also getting *egg-cited* for the season (*sorry!*), offering dishes like Christmas eggs Benedict, which features delicious ham hock served on a thick slice of brioche loaf.

Clockwise from top left: Overnight sausage and egg breakfast casserole, @thecoldcraftsman (Instagram, US) || Christmas eggs benedict with Christmas ham hock, sage, tenderstem broccoli, classic hollandaise and brioche loaf, Third Day Coffee (Antrim, UK) || Christmas tree devilled eggs, @recipes (TikTok) || Christmas croissant breakfast sandwiches, @asiliglamcooks (TikTok, US)

FESTIVE TOAST

The origins of French toast date back to the Roman Empire, but today, consumers continue to adapt this classic eggy bread recipe to embrace the festive season!

Year-round, French toast is a beloved breakfast option, but during Christmas, we witness a surge in festive flavours, particularly sweeter varieties. Spiced versions, drowning in cinnamon and honey, covered in toppings, reflect the desire for warmth during these colder months. Traditional seasonal desserts are also getting a French toast makeover: panettone – ideally loaded with chocolate chips – replaces the usual white bread base, sticky toffee pudding swaps out sponge cake for thick slices of bread, and the trending Black Forest flavour profile incorporates these delightful carbohydrate carriers. If these flavours don't appeal to you, there's plenty more inspiration to explore – like eggnog, Christmas pudding, and chocolate orange. *Delicious!*



Clockwise from top left: Festive French toast with cinnamon honey and maple caramelised pecans, **Fortnum & Mason** (London, UK) || Panettone French toast, **@nellskitchn** (Instagram, UK) || Sticky toffee French toast, **Papercup** (Glasgow, UK) || Black Forest French toast, **Federal Cafe & Bar** (Manchester, UK)



GINGER BREADFAST

The ultimate winter warmer, ginger spice is often the only confirmation we need to know the seasons have changed.

Thriving in treats such as pastries, drinks, and doughnuts (*the list goes on...*), ginger spice has also significantly impacted the brunch and brekkie space. From fluffy pancakes and cheesecake croissant bakes to cakes topped with mascarpone and lingonberry, the options are pure indulgence! However, there is also room for a healthier twist on gingerbread breakfasts. Interest in gingerbread protein pancakes and pumpkin spice porridge is growing, welcoming seasonal flavours like apple, maple syrup, and a gingerbread crunch! Perhaps by next Christmas, we could see ready-made, American-style protein-packed gingerbread pancakes and convenient just-add-water ginger spice porridge pots available for busy Christmas mornings (*and more time for opening presents, duh!*).

Clockwise from top left: Gingerbread cheesecake croissant bake, @kizactivelife (TikTok, AU) || Gingerbread cake with mascarpone and lingonberry, WAY (Helsinki, Finland) || Pumpkin spice porridge, apple, maple syrup & gingerbread, @chefscott_fair (Instagram, UK) || Coles bakery gingerbread pancakes (AU)

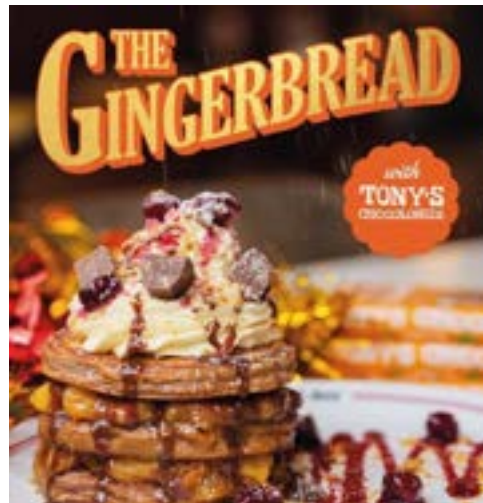
BREKKIE BOWLS

During winter mornings, it often takes only a few enticing things to pull us out of our cosy electric blanket beds, and one of those is the promise of a warm breakfast bowl!

The shift from summer Greek yoghurt to warming spiced granola and porridge perfectly marks the change in season, and this year it's less Oliver Twist gloop and more as good as dessert. Jumbo oat mixes combined with mixed seeds, dark chocolate and orange are ideal for saving time in the morning without sacrificing nutrition. While cinnamon roll-inspired granola goes down a treat enjoyed with milk or sprinkled on porridge for an extra crunch. Seasonal cereals also add to the festive spirit, especially with delightful flavours like holiday cookie cereal and marshmallow 'snow' pieces. Just be sure to enjoy them quickly, or you might find yourself left with red milk!



Clockwise from top left: Cinnamon roll granola, Zeit für Brot (Germany) || Pear and cinnamon porridge with Christmas spice granola, @vicsveggiekitchen (Instagram, UK) || Holiday cookie cereal, MILK BAR (US) || Dark chocolate orange dry oat mix, @emthenutritionist (Instagram, UK)



PANCAKES

Pancakes are the ultimate weekend treat, often drenched in maple syrup and topped with a slab of butter. And while this classic combination is totally sufficient for holiday celebrations, introducing festive flavours can make the season even more enjoyable!

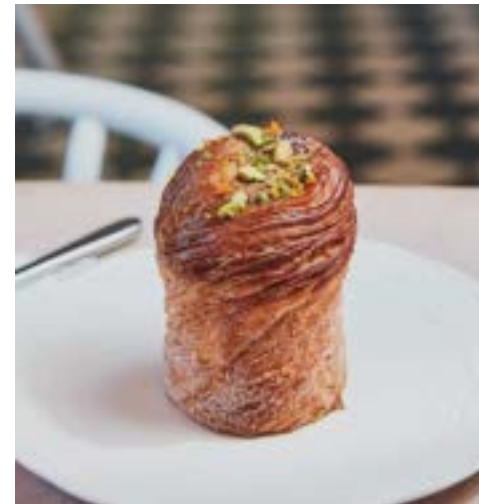
The gingerbread theme is a desirable choice here, too. Imagine gingerbread pancakes studded with chocolate, layered with a fruity clementine compote, topped with sweet vanilla cream and a gingerbread crumb. Finished with a generous drizzle (*or downpour*) of sour cherry and chocolate sauce, is anyone drooling yet? Likewise, traditional flavours such as peppermint come to the forefront, and beyond flavour, why not stack your green pancakes into Christmas tree shapes as DIY kits become more accessible in retail? And don't worry, mince pie lovers, we haven't forgotten about you! How about a giant mince pie pancake filled with brandy-soaked mixed fruit and topped with clotted cream? Sounds good, right?

Clockwise from top left: Giant mince pie pancake, **M&S** (UK) || The gingerbread pancake with Tony's Chocolonely, **The Breakfast Club** (UK) || Matcha pancake Christmas trees, **Chaokoh** (UK) || Chocolate peppermint pancakes, **IHOP** (US)

PASTRY TREATS

Picture this: you're on a lunchtime walk, wrapped in your scarf and cosy coat when you pass by your favourite bakery. Suddenly, the inviting smell of warming Christmas spices fills the air. Now, who could resist treating themselves?

After all, it is Christmas! Bakery spots have quickly become Gen Z's ultimate weekend indulgence, turning the holiday season into a vibrant experience as bakeries look to sell out of their seasonal delights before midday strikes. Driven by their versatility, the flavour combinations prove endless. Think eggnog, spiced pear, and the seasonal favourite, cherry, transforming into cruffins, tarts, and other pastry forms. The leading trend, however, seems to be enjoying classic Christmas flavours with modern twists in bite-sized portions. Picture a beef Wellington Danish, Quality Street-inspired croissants, and trifle cheesecake tarts beautifully displayed in bakery aisles at your local supermarket. But be quick - these treats won't last long!



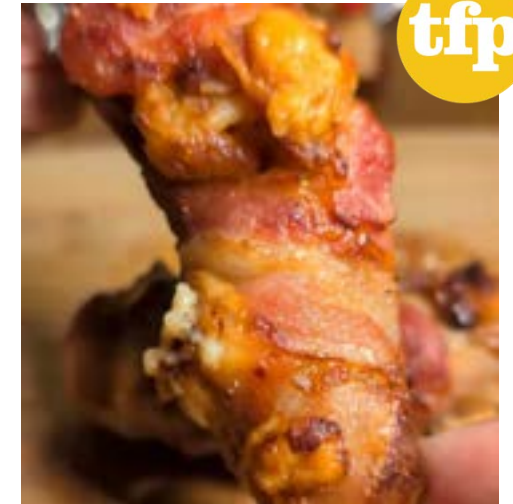
Clockwise from top left: The stuffed turkey, **Lune Croissanterie** (AU) || Spiced pear & vanilla cream cruffin, **Lunko** (Liverpool, UK) || Cherry chocolate tart, **Rollers Bakehouse** (Sydney, AU) || Eggnog cruffin, **The Flour Pot Bakery** (Brighton, UK)

THE LEFTOVERS

For many, the real celebration begins on Boxing Day. After all, who doesn't love leftovers?

For breakfast and brunch, Christmas treats can be creatively used in croissants or layered between thick slices of bread. Even Yorkshire pudding can be transformed into a wrap by folding it over and loading it with your favourite fillings. Imagine leftover Christmas cheeses melting with cranberry sauce and all the holiday meats and trimmings in one delicious sandwich. Yes *please!*

Furthermore, pigs-in-blankets are more popular than ever in 2024, with various formats and flavour variations emerging worldwide. For a unique twist on the classic full English breakfast this Boxing Day, why not take the leftovers (*you may need to buy more on purpose!*) and stuff them with cheesy beans?



Clockwise from top left: Croissant filled with brie, cranberry sauce and walnuts, @poorprincesskimmy (TikTok, UK) || Pigs-in-blankets filled with cheesy beans, @emilyscooking_ (TikTok, UK) || Leftover Christmas sandwich, @foodieholly (Instagram, UK) || Yorkshire pudding toasties, @emilyscooking_ (Instagram, UK)

THOUGHT STARTERS

- **Traditional bakes, modern takes:** an increasing number of consumers are eager to experience their favourite Christmas flavours in new formats. Instead of the typical eggnog drink, why not try an eggnog cruffin? Similarly, a classic mince pie can transform and attract new audiences when served as breakfast pancakes topped with clotted cream!
- **Seasonal nutrition:** Christmas is brimming with sweet and rich treats, and while there is certainly room for indulgence during the season, we can also incorporate healthier breakfast options to extend the festive spirit. For example, consider adding a boost of protein to gingerbread pancakes or mixing in some seeds to chocolate orange granola to enhance its gut-friendly appeal. Remember, healthy doesn't have to mean lacking in flavour!
- **Convenient Christmas:** since Christmas is already a busy time in the kitchen, why not simplify breakfast? Think about preparing overnight croissant bakes or using Christmas Day leftovers stuffed inside pre-made croissants – easy and delicious!





GET THE PARTY STARTED

Kick off the celebrations (and keep them going) with fun, flavoursome, anytime treats.

Christmas is a time for rest, relaxation, family gatherings – and food. With hungry households to feed, the food-fuelled festivities begin long before (and continue long after) the headliner dinner, with anytime grazing formats filling the hunger gap whenever it appears.

Crisps, nuts & co. showcase the latest festive flavours, paired with delightful dips. The Christmas cheeseboard takes a contemporary twist, while melty cheese dishes pair decadence with dip-ability. pigs-in-Blankets go from side dish to standalone star, and sausage rolls show their versatility as flavour carriers. charcuterie boards get inventive, with playful presentation and budget-friendly options, while bites & balls prove that small is beautiful – and extremely delicious.



GET THE PARTY STARTED

CRISPS, NUTS & CO.
 DELIGHTFUL DIPS
 MELTY CHEESE
 CHEESE BOARD 2.0
 GOURMET CHARCUTERIE
 PIGS-IN-BLANKETS
 SAUSAGE ROLLS
 BITES & BALLS



TFP TREND ALIGNMENT: Adapt to Thrive || Simply Delicious
 || Savvy Living

KEY REGIONS:



CRISPS, NUTS & CO.

Snack-grazing formats are dialled-up to 11 with festive flavours applied to all manner of nibble-sized treats.

Crisps (aka potato chips) are a big player, running the full remit of savoury and swavoury flavours, from classic Christmas dinner staples such as turkey and stuffing or pigs-in-blankets (a *huge* flavour this year), to wintry rum-spiced roast duck, turkey tikka masala, and lobster thermidor... commonly finished with a sweet touch from hot honey, maple or fruits (e.g. Tyrrells' Wensleydale & cranberry). The same Yuletide treatment is applied to nuts, popcorn and pretzels, where flavours tend to be at the sweeter end of the spectrum, riffing on warming spice and seasonal star peppermint. Gone are the days of a simple bowl of salted peanuts on the Christmas coffee table – now we're treated to pecans, macadamias, pistachios and more blended with burnt butter, hot chocolate... even eggnog flavours.



Clockwise from top left: Butter cinnamon coated peanuts & toasted marshmallow hot chocolate cashews, **Planters** (US) || Turkey & stuffing flavour crinkle cut crisps, **Seabrook** (UK) || Mulled wine flavoured caramelised popcorn, **Joe & Seph's** (UK) || White chocolate crème & peppermint pretzel crisps, **Snack Factory** (US)



DELIGHTFUL DIPS

No grazing bowl is complete without an accompanying dip: sweet, savoury... or a combination of both!

Take cream cheese, mayo or hummus, give it a Christmas-y twist and you have a dippable, dunkable, scoopable treat that can be pulled straight from the refrigerator for anytime snacking.

Whether that means blitzing a whole festive dinner into a cream cheese base (like M&S' viral turkey feast dip) or using chickpeas to create a sweet cinnamon and chocolate hummus, both retail shelves and social media channels are full of inventive ideas that can be whipped up in mere minutes. TikTok's Little Debbie Christmas tree dip recipe has spawned a retail version, leading the way for sweet dip formats, while swavoury takes make use of both warming spice and chilli heat in fruity, creamy, piquant plays.

Clockwise from top left: Dark chocolate cinnamon hummus dip, **Cedar's** (US) || Gingerbread cheesecake dip, **Meatloaf & Melodrama** (Blog, US) || Turkey feast dip – a cream cheese, cream & mayo base blended with turkey gravy, shredded turkey & bacon, cranberry sauce and stuffing crumb, **M&S** (UK) || Cranberry jalapeño cream cheese dip, **@realmomkitchen** (Instagram, US)

MELTY CHEESE

This year's must-have Christmas cheese is... all of them (just so long as they're melted).

Baked Camembert is a perennial favourite, studded with herbs for fondue fun; the same is true this season but now the default pairing is hot honey. Socials are full of make-at-home guides featuring simple crosshatch cuts to intricate snowflake and Santa designs, while bake-at-home cheese dips (think rarebit, burrata, Stilton) are found across multiple UK supermarket ranges. Hot on its heels is raclette with mini tabletop kits hitting retail shelves and the cheese itself being called out as a focal ingredient in unctuous, cheese-pull creations. Multiple cheeses are layered into single formats, finished with sweet and tangy relishes to cut through the richness, and homemade cheese wrap recipes flood TikTok with their 'take-any-cheese, wrap-and-bake-it' formula.



Clockwise from top left: Bake-at-home burrata with 'nduja & ciabatta crumb, **M&S** (UK) || Hot honey air fryer Camembert fondue dip, **@chloeandleox** (TikTok, UK) || Reuben rarebit hot cheese dip - Emmental, pastrami, and pickled gherkins with ale, Worcester sauce, crème fraîche & mustard, **Waitrose** (UK) || Prosciutto-wrapped Boursin cheese bites with hot honey & walnuts, **@thefeedfeed** (TikTok, US)



CHEESE BOARD 2.0

The snacking table centrepiece is being reimagined to create maximum fun with minimal effort.

The classic triumvirate of Cheddar, Brie and Stilton take a back seat as a whole host of alternative – largely soft – cheeses form the basis of fun, festive cheese board riffs.

Stress-free entertaining is the name of the game here, with social media its test kitchen. Users share recipes for easy yet impactful sharing dishes that can be made in minutes and offer oodles of quirky charm. ‘Brie trees’ are a current TikTok craze: coated wedges on pretzel sticks that can be piled onto a platter for communal grazing. Burrata brings theatre with its showstopping stracciatella spill, while goat, sheep and cream cheeses are blended with festive fruits and nuts to create decadent swavoury spreads – formed into classic motifs such as reindeer, snowmen and angels.



Clockwise from top left: Burrata snowman & cherry tomato sharing platter, [@foodbites](#) (Instagram, US) || Goat cheese, pistachio, fig jam & honey sharing log, [@homemadefoodjunkie](#) (TikTok, US) || ‘Brie tree’ board featuring brie wedges on pretzel sticks, topped with parsley, walnuts, cranberries, pistachios & hot honey, [@palomamedeiros.ca](#) (TikTok, US) || Cream cheese, cheddar, cranberry & chive ‘reindeer’ with pretzel antlers, [@melissas_healthykitchen](#) (TikTok, US)

GOURMET CHARCUTERIE

Christmas cold cuts for fun-loving grown ups.

Salamis, pastramis, Parma and patta negra; appetite for cured meats is on the up, as evidenced by the range of imaginative festive formats appearing across foodservice, social media and retail. Take Aldi's (US) 'charcuterie chalet', for example, created to showcase their range of budget-friendly cured meats that (they claim) hit the sweet spot between quality and cost, or M&S's 'charcuter-tree' that jumps on the social media trend for fun seasonal presentation. Indeed, TikTok is awash with amateur charcuterie creations, from wreaths to stockings to Santas, designed for grazing by multiple mouths. But if communal charcuterie isn't your thing, how about a personal plate, perfectly proportioned to sit on top of a wine glass?



Clockwise from top left: 'Charcuterie Chalet' – smoked Gouda, salami, olive, Tête de Moine & pecans, **Aldi** (US) || 'Charcute-wreath' – fresh herbs topped with meat, cheese & vegetable sticks, @jessiejanedaye (TikTok, US) || Build-your-own Christmas charcuter-tree, **M&S** (UK) || Mini charcuterie board wine toppers, **Armand Boucherie** (Quebec, Canada)



PIGS-IN-BLANKETS

These little piggies have Christmas all wrapped up.

Pigs-in-blankets, the combo of chipolatas wrapped in streaky bacon, have transitioned from Christmas dinner side dish to become the standout format (and flavour) of this season.

In their trad form, they're turned into XL offerings, pinwheels, used as dippers for fondue, baked into pies, casseroles and mac 'n' cheese; the addition of pastry gives a P-I-B sausage roll, vol-au-vent or croissant; pork is replaced by venison for a game-y take, or beef paired with kraut and cheese for a Reuben riff; cheesy takes replace chipolatas with paneer, halloumi or mozzarella, while Pizza Express went so far as to create a seasonal P-I-B dough ball and dip. The pigs-in-blankets formula is used to flavour everything from crisps to spreadable cheese (we're looking at you, Primula) – even Heinz' baked beans and sausages got a P-I-B makeover.

Clockwise from top left: Everything bagel pigs-in-blankets sausage rolls & dip, **America's Test Kitchen** (Instagram, US) || XXL pigs in blankets, **Iceland** (UK) || Pigs-in-blankets roulette – each pack contains 8x mild, 6x medium and 4x grim reaper chilli spiced snacks, accompanied by a pot of cranberry dipping sauce, **Aldi** (UK) || Air fryer halloumi pigs-in-blankets & 'dippy eggs', **@whatiateforbreakfast** (Instagram, UK)

SAUSAGE ROLLS

On a roll with... the perfect pastry-wrapped party food!

Close cousin to pigs-in-blankets, sausage rolls add pastry into the equation to create a hearty snack that's loved for its ease of preparation and all-day eating potential. As such, mini and sharing formats are popular. Ring-form sausage roll wreaths create a grazing table centrepiece (like Waitrose's tear-and-share 'snowflake') that are doing the rounds on social media, with flavour combinations running from traditional Christmas dinner ingredients to swicy hot honey to cheese-laden and global cuisine takes.

There's plenty of fun, too. The pastry-wrapped form is customised to create penguins and snowmen, while bitesize minis are served with all manner of dips – from BBQ to sweet chilli, cheesy fondue to good old gravy.



Clockwise from top left: Air-fried Christmas dinner sausage rolls – turkey mince & sage stuffing, pork sausage meat & cranberry sauce in puff pastry, **Susannah's Kitchen** (YouTube, UK) || Sausage roll snowmen, **@foodbites** (TikTok, US) || Lumpia Shanghai sausage roll, **House of Papi** (Sydney, AU) || Bacon & jalapeño sausage roll wheel made using **Angus & Oink** bacon, honey & jalapeño BBQ seasoning (UK)



BITES & BALLS

Small in scale but big in flavour, bitesize snacks fill the gaps between brekkie, brunch and the main event.

Mini and bitesize formats are the perfect Christmas standby, ready to be pulled out and popped on a table should any unexpected visitors call by. Always an inventive category, this year is no exception. Homely comfort runs through many of the offerings that take homemade favourites (mac 'n' cheese, cottage pie) and reinvent them as snack-size morsels.

On-stick formats offer mess-free eating across sweet *and* savoury, with miniaturised East Asian formats such as yakitori, satay and bao buns proving popular in retail. Cheese is another strong theme: formed into breadcrumb bites, stuffed inside mini burgers, or used to flavour crisps and nuts – with specific cheese varieties highlighted.

Clockwise from top left: Mini cottage pie filled Yorkshire puddings, **Asda** (UK) || Mini Nutella & puff pastry Christmas tree sticks, **@eatmebaby.onemoretime** (TikTok, Germany) || White cheddar 'Snowy Cheese Ball Minis', **Cheetos** (US) || Fig, cheddar & Parmesan star bites coated in breadcrumbs, **Coles** (AU)

THOUGHT STARTERS

- **Think small:** snacking, in general, is on the rise; a fact that is echoed during the Christmas period. What festive favourites could be reinterpreted as unique bitesize offerings – mini mince pie bao, complete with brandy sauce dip? Or a single bite prawn cocktail consisting of a king prawn, Marie Rose sauce, and preserved lemon wrapped in an iceberg lettuce parcel?
- **Pig out:** pigs-in-blankets have emerged as a standout format this season, with some truly imaginative twists on the snack. So, what's the next step? Pigs-in-blankets Korean style corndogs, perhaps, or a Fat Duck-inspired swavoury P-I-B ice cream?
- **Do-anything dips:** a natural pairing for finger food grazing formats, dips offer near endless opportunity for flavour play. All the elements of a festive dinner have been blended into snacking dips to great effect, and now sweet-savoury crossovers are beginning to emerge. Could a dip be made that could be used in both sweet *and* savoury applications? Think honey, spice and roasted nut/seed flavours.





THE MAIN EVENT

This year, the main event – that one meal around which the big day orbits – looks quite different to the traditional takes of yore.

Four defining factors shaping trends this year are sustainability, snackification, premiumisation and convenience, of which Christmas appears to be a microcosm. Rare and native breeds of pork, beef and game provide sustainable alternative centrepieces. Meanwhile, an established turkey alternative, the beef Wellington, gets a touch of pescetarian prestige.

Restaurants offer to take care of the Christmas meal, for those who are time pressed. The dreaded nut roasts typically assigned to veggies and vegans are dispensed with in favour of fine dining flourishes and satisfying sarnies. Meanwhile, turkey and chicken are given a twist to guarantee things don't get dry either, while premium premade gravy and haute hacks give big flavour, fast!



THE MAIN EVENT

BEEF

TURKEY & CHICKEN

PORK & HAM

DUCK & GAME

SEAFOOD

VEG & VEGAN

GRAVY



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living || Evolve Smarter

KEY REGIONS:





BEEF

Increasingly, we're seeing beef take the stage this Christmas, converging with an overarching trend toward rare and native breeds and consumers' demonstrable desire to spend a little more on quality.

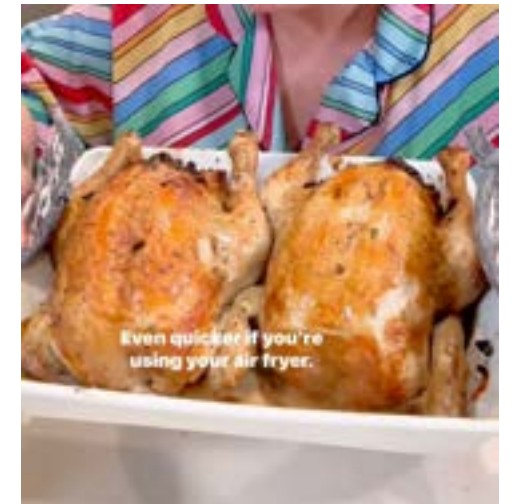
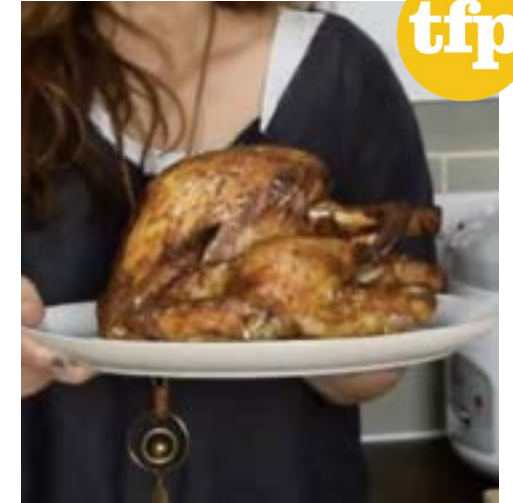
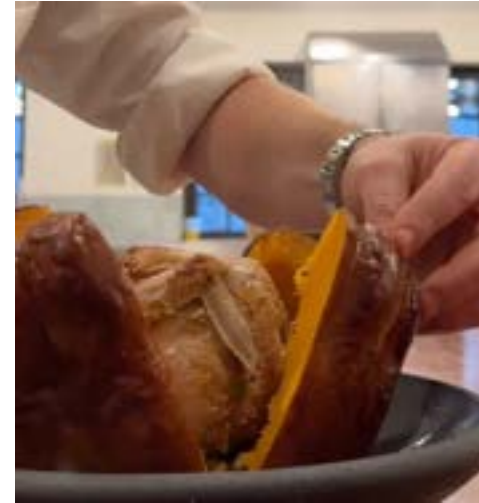
To this end, Wagyu dominates when it comes to beef breeds, from supermarkets and online delivery platforms to restaurants. Hulking pieces of Wagyu chateaubriand are on supermarket shelves. Wagyu forerib 'Christmas joints' come packed with parsley, bone marrow, mustard and pepper, making turning on the oven the only step required, keeping things easy for the big day. Meanwhile, restaurants seek to take the weight off our backs entirely, offering Robata Wagyu cooked to blushing perfection, served with potato emulsion and Wagyu jus. Other restaurants are serving up affordable platters of dry-aged rump steak along with lamb chops, sugar pit bacon and sausages – with beef dripping chips!

*Clockwise from top left: Wagyu chateaubriand, **Aldi** (UK) || Mixed grill for two with dry-aged rump steak, lamb chops, sugar pit bacon chops, sausages, bone marrow, onion rings, roasted mushrooms & tomatoes, beef dripping chips & HP gravy, **Hawksmoor** (Manchester, UK) || Robata Wagyu with potato emulsion & Wagyu jus, **Fenix** (Manchester, UK) || Wagyu forerib Christmas joint with bone marrow, parsley, mustard & black pepper, **Warrendale Wagyu/Farmison & Co** (UK)*

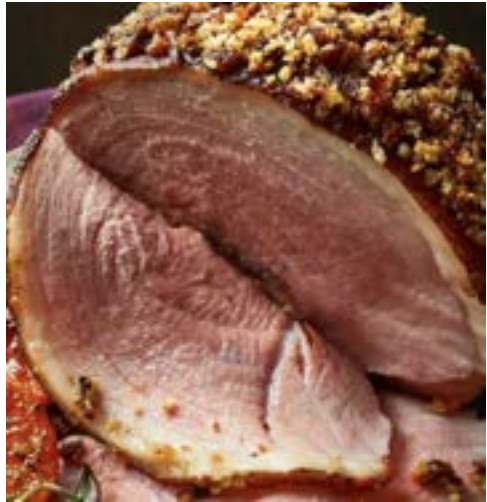
TURKEY & CHICKEN

Although beef is trending, notions of tradition remain, with turkey still at the helm of many Christmas spreads, whilst some opt for chicken instead – all with a twist.

Seasonally sweet koginut squashes have their innards carved out and stuffed into a whole mini turkey, which is then sealed inside the koginut. Allowing the bird to steam prevents the dreaded drying-out often associated with the bird. Conversely, we're seeing turkey cooked tandoori-style – roasted to amber hues, complete with all the gnarly charred bits synonymous with the method. A brace of chickens are roasted together, filled with a stuffing of orange, pistachio and cranberry, effused with Christmas scents. For those who want to make Christmas dinner a little more straightforward, chicken breasts can be stuffed with air-fried brie and cranberry sauce before being dredged and breadcrumbed, then air-fried to golden perfection.



Clockwise from top left: Koginut squash stuffing-stuffed mini turkey-stuffed koginut squash, [@chefdanbarber](#) (Instagram, US) || Whole tandoori turkey, [@azlinbloor](#) (Instagram, UK) || Roast chickens stuffed with orange, pistachio & cranberry, [@steph_cooks_stuff](#) (Instagram, AU) || Air-fried brie & cranberry-stuffed breadcrumbed chicken breast, [@boredoflunch](#) (Instagram, UK)



PORK & HAM

Of course, what Christmas spread is complete without a ham of some kind? From a few slices with the main event, Boxing Day sandwiches, or simply hacking off the caramelly bits in a late-night fridge raid, hams play a vital role in our Christmas celebrations.

Rare breeds feature once again here, with full legs of Kurobuta, whilst rib racks neatly French-trimmed with groves of glass-like crackling are smoked over native Victorian ash. Elsewhere, the classic gammon comes varnished with a sticky glaze comprising of white rum, orange, lemon and heaps of muscovado, studded with a flaxen panettone crumb. But, as ever, nothing stops a good twist and, to this end, the Italian classic porchetta receives a fusion treatment, being stuffed with gyoza dumplings and pooled in a jus deepened with miso.

Clockwise from top left: Glazed rare breed Kurobuta full leg of ham, **Victor Churchill** (Sydney, AU) || Native Victorian ash-smoked rib rack roast ham, **Coles** (AU) || Gyoza-filled porchetta, **House of Fu** (Leeds, UK) || Sweet spiced gammon with orange, lemon & white rum glaze & panettone crumb, **Waitrose** (UK)

DUCK & GAME

Nothing quite gives the feel of a snow-drifted Dickensian Christmas spread like duck and game. Not only are they delicious, but as consumers clamour for a trifecta of quality, sustainability and locality, game fills these requirements exactly.

Guinea fowl comes wrapped in fatty pancetta to keep things plump and moist, stuffed with a rough-hewn mix of Piedmontese Fassona, chestnuts and raisins. Preassembled for collection or delivery means you can get on enjoying the big day. Oven-baked venison, moodily crusted in artichoke skin ash, is served with black trumpet mushrooms, pear, snow peas and gleaming dark chocolate jus. Meanwhile, burnished spatchcocked duck infused with cinnamon and thyme not only benefits from a quicker, even cook time but assures every inch of fat renders to a crisp. When it comes to fine dining, the richness of duck is cut with a sweet carrot raviolo an orange and honey reduction.



Clockwise from top left: Cranberry-glazed spatchcocked duck with cinnamon & thyme, @ottolenghi (Instagram, UK) || Guinea fowl wrapped in pancetta & stuffed with Piedmontese Fassona, chestnuts & raisins, Il Mannarino (Italy) || Oven-baked venison, black trumpet, artichoke, pear, snow pea & dark chocolate jus, Five Oars Coffee Roasters (Singapore) || Hudson Valley duck, carrot raviolo with an orange & honey reduction, Lucie (Toronto, Canada)



SEAFOOD

Naturally, not everyone is subject to meat madness and prefer to duck the idea of game altogether, so many look to seafood for that sense of occasion instead.

Prawns served raw and crowned with a dollop of caviar, straddle a piece of salsify, along with a dot of port reduction, offering a bougie bite (or two) for kick-off proceedings. Honeyed chunks of native lobster scull in a peppercorn sauce fortified with brandy in a nod to a bisque, cushioned by a potato mousse and covered in a wild thatch of shoestring fries. Meanwhile, smoked oysters are served with a charcoal grissini wrapped with cured venison in a refined take on the ubiquitous union of 'surf and turf'. Often, beef Wellington is no stranger to the festive period and so fish lovers unite – over a 'salmon belly Welly' featuring cured and smoked salmon belly in a lobster mousse, finished with a lobster roe sauce, spiked with shrimp curry oil.

Clockwise from top left: Prawn, caviar, salsify & port reduction, **Les Enfants du Marché** (Paris, France) || Native lobster, baked potato mousse, peppercorn sauce with brandy, topped with shoestring fries, **The Cottage in the Wood** (Cumbria, UK) || Smoked oyster & cured venison with charcoal grissini, **The Canoe** (Toronto, Canada) || Salmon Belly Welly: Cured & smoked salmon belly in a lobster mousse, finished with a lobster roe sauce & shrimp curry oil, **Fallow** (London, UK)

VEG & VEGAN

Christmas isn't always synonymous with veg or vegan options that feel on par with their meaty counterparts. But things are moving in the right direction...

As eating habits continue to change, with many rejecting traditional notions and favouring a more hedonistic approach, vegetarian and vegan options flourish. Stunning plates of butter-roasted turnips are joined with an ooze of sweetly sour cherry purée and luxe macadamia cream. Tender slips of braised koginut squash with the tang of black garlic are cut with birch syrup, walnut oil and perked up with lime and mint. A frilled splay of maitake mushroom is glazed with a smouldering jerk sauce, offset with pineapple. Pumpkin seed paninis are wreathed in rosemary, carrying a payload of thyme-roasted carrots, pearly slabs of mozzarella, sweet roasted leeks, fragrant pesto and toothsome spinach leaves, ready to grab and go.



Clockwise from top left: Pumpkin seed panino with rosemary & thyme roasted carrot, mozzarella, roasted leeks, pesto & spinach leaves, **Caffe Nero** (UK) || Butter roasted turnips with cherry & macadamia cream, **Sunhands** (Melbourne, AU) || Braised koginut squash in black garlic with birch syrup, walnut oil, lime & mint, **Ten** (Toronto, Canada) || Maitake, jerk sauce & pineapple, **Land** (Birmingham, UK)

GRAVY

Whether an indulgent touch or a means to save a criminally dry main event dish, we're seeing an uptick in solutions that maximise flavour whilst minimising time in the kitchen on Christmas.

A current 'gravy hack' trend uses a traditional method of roasting wings and bones with vegetables but adding quality stock to further boost the flavour. Environmental concerns are sent packing, with premium turkey gravy made with Madeira and sage available in 100% recyclable cans. Feeding into the trend for delicious deviations from the norm, veggie-friendly gravies come flavoured with herbes de Provence, caramelised onion and thyme or roasted garlic and rosemary. Quick, easy and flavourful, they offer a premium touch without costing premium time on the big day. Similarly, gravy granules give an unusual twist, infusing the festive flavours of cinnamon and cardamom.



Clockwise from top left: 'Make ahead gravy', @annasfamilykitchen (Instagram, UK) || Turkey gravy with Madeira & sage, Potts' (UK) || 'Home-style gravies; herbes de Provence, caramelised onion & thyme, roasted garlic & rosemary, Heinz (US) || Winter spice gravy granules with cinnamon & cardamom, Bisto (UK)

THOUGHT STARTERS

- **Rare and well done:** as consumers look to rare and native breeds for both flavour and sustainability as alternatives to the main event, perhaps it's time to look beyond Wagyu, in favour of meat closer to home, of which there are plenty. The Ruby Red Devon, Mangalitza and game like venison, rabbit and boar all tick the box!
- **Ho-ho-hot pot:** with Christmas becoming increasingly characterised by a breakaway from tradition, why not consider a festive take on a hot pot? People can get together, bring what they like and cook it just to their liking, all in a Christmassy broth – or gravy, why not?
- **Make the cut:** the pursuit of newness and twists on the traditional are clear drivers around consumer's choices this Christmas, particularly when it comes to main event items. Taking cues from Coles' rib rack pork roast, look to less obvious cuts and preparations of meat to create showstopping roasts that are a real talking point. Fish, too, offers great opportunity for new forms of butchery – check out the work of Josh Niland for inspiration!





SIDES AS STARS

The meat is paramount, but the real excitement lies in the sides, *right?*

This year, that sentiment is more relevant than ever as sides take centre stage, thanks to elevated recipes, innovative flavours, and creative twists on traditional formats. Forget bland, over-boiled sprouts and carrots; instead, try roasted versions featuring black garlic, parmesan, and cardamom butter. Even the oft-overlooked parsnip can become a favourite when coated in smoked chilli, turmeric, and panko breadcrumbs! Or take the humble potato - most people's favourite part of a roast. Imagine it roasted in wagyu beef fat or with a spicy kick from 'nduja. These sides are also stepping into main dish territory. Mac and cheese welcomes all the trimmings piled on top while stuffing replaces ordinary cupboard mixes, spread on flatbreads and smothered in creamy cheese sauce. Furthermore, seasonal salads are no longer an afterthought; featuring roasted vegetables and hearty grains, they're perfect for enjoying throughout the holidays!



SIDES AS STARS

SPROUTS

SPUDS

CARROTS

PARSNIPS

SEASONAL SALAD

STUFFING

MAC 'N' CHEESE



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:



SPROUTS

Love them or hate them, sprouts are here to stay! In fact, they're thriving more than ever.

Don't worry; this isn't the notorious over-boiled version!

Instead, these little green gems are becoming the stars of Christmas dinners/full meals within themselves! Serve with cranberry jams, sweet dates, and black garlic, or top with chestnut crumbs and tofu for a different taste! This year, the preferred cooking method is the crispier, the better, with many people opting for charred edges to enhance the flavour profile. And hey, if you're still a sprout hater – try adding a layer of parmesan because everything is better with a shaving of cheese, right? Or, if cheese isn't your thing, there's still a recipe for everyone this year. For example, Jamie Oliver has a delicious Brussels sprouts stuffing made with sausage, sage, and apple!



Clockwise from top left: Brussels sprouts covered in berry powder, **POPL** (Copenhagen, Denmark) || Sprouts served with cranberry jam, chestnut tahini and chestnut crumb, **Maray** (Liverpool, UK) || Crispy brussels sprouts, black garlic, vincotto, pepperoncino, **Gusto 101** (Toronto, Canada) || Brussels sprouts, dates & tofu, **Bubala** (London, UK)



SPUDS

Almost everyone's favourite part of the Christmas roast is the potatoes...however, this year we're looking beyond the typical goose fat recipe!

We saw the viral smashed potato salad trend on TikTok, known for its crispy exterior and creamy interior. Now that beloved format is making its way to roast dinners, topped with Parmesan and fresh herbs, ready for a generous pour of gravy! As you might have gathered, the theme here is *more is more*. So, why not elevate those roast potatoes with garlic and nduja for a spicy flavour profile? Instead of duck fat, consider roasting them in wagyu beef fat. And just like our sprout theme, cheese is a highlight here! Who can resist carbs and gooey, melty cheese? *Go on then!*

Clockwise from top left: Smashed potato, **Bon Appetit Mag** (US) || Garlic 'nduja roast potatoes, **@rhi.scran** (Instagram, UK) || Wagyu beef roast potatoes, **Waitrose** (UK) || Raclette loaded roasties, **Parmogeddon** (UK)

CARROTS

A staple veggie to any roast, carrots add a touch of brightness to our overly beige and brown feast!

Of course, honey-roasted carrots have maintained their popularity as a simple way to introduce a complementary sweetness. However, adding dairy and carbohydrate-rich ingredients elevates side dishes to new heights. Think roasted carrots paired with parmesan breadcrumbs lying on a bed of creamy goat's curd or intertwined with hearty ancient grains.

Butter also plays a significant role in enhancing flavour with minimal effort. Thanks to Thomas Straker and his 'All Things Butter' series on Instagram, many consumers now consider compound butter to elevate their carrots. For instance, cardamom and garlic butter, or why not combine the infamous honey flavour in rich, salty butter to create a take on the trending 'swavoury' flavour profile?



Clockwise from top left: Roasted carrots, garlicky caesar, parm breadcrumbs, **Verbena** (Birmingham, UK) || Roasted heritage carrots, ancient grains, pickled onions and goat's curd, **Hawksmoor** (Manchester, UK) || Garlic parmesan carrot fries, **Buzzfeed Tasty** (US) || Roasted carrots with cardamom butter, **Sur La Table** (US)



PARSNIPS

Much like turkey, parsnips are often only appreciated during a Christmas roast.

However, we (*and many consumers*) believe it's time to change that! Adored for their natural sweetness, parsnips can bring endless joy to the dining table with their versatile format and flavour combinations. While the traditional roasted method, which caramelises their natural sugars, remains a favourite, there is a growing trend toward adding spices and global flavours. Consider crispy bang bang parsnips with smoked chilli, turmeric, and panko breadcrumbs, or try glazes infused with chilli, garlic, and sticky-sweet honey! Beyond flavour variations, the ways we prepare parsnips are also evolving. You can blend them with cauliflower and garlic for a flavourful mash, or introduce a Spanish twist by adding punchy chorizo and a dash of sherry (*you can save the rest for a glass or two later!*).

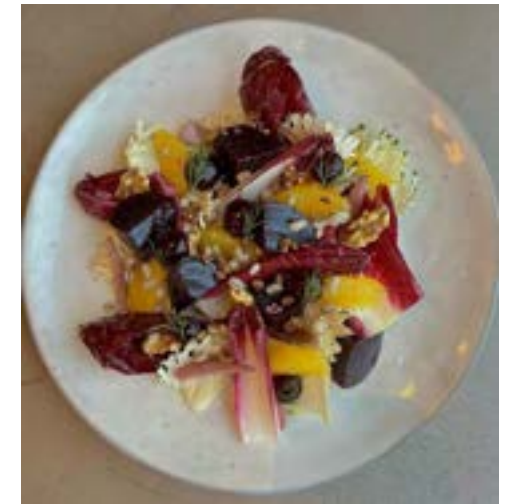
Clockwise from top left: Parsnip & cauliflower mash with roasted garlic, @nyalakrullaars (Instagram, France) || Bang bang parsnips, @lagomchef (Instagram, UK) || Spiced parsnip fries, Pinch of Nom (UK) || Sherry-braised parsnips with chorizo, The Guardian (UK)

SEASONAL SALAD

Visualise a few days after Christmas when you're full of chocolate, perhaps a few too many beverages, and a lot of beige food... at this point, a salad doesn't sound too bad, *right?*

While salads often don't feel like much of a treat, trust us, these are worth making an exception for!

A far cry from sad-looking leaves with a few scattered toppings, they're packed with flavour and, more importantly, are hearty and satisfying. Consider using leftover potatoes from the festivities and pairing them with deliciously charred leeks and a dollop of lemon crème fraîche. Or maybe you cooked too many carrots - no problem! Just pop them back in the air fryer with a sprinkle of Parmesan and drizzle with a Dijon mustard dressing. It's no surprise that winter veggies are abundant; roasted beetroot and butternut squash, paired with winter greens, create a dish that requires minimal effort but delivers maximum festive vibes!



Clockwise from top left: Charred leek and warm baby potato salad with lemon crème fraîche, hazelnut crumb and chives, **POPHAMS** (London, UK) || The lazy Christmas salad, **@alicebleathman_** (Instagram, AU) || Roasted beetroot, orange, barley, winter leaves, pickled red onion & toasted walnuts salad, **@mathildesgrasmere** (Instagram, UK) || Parmesan-crusted carrot salad, **@healthbycaroline** (Instagram, UK)



STUFFING

Another Christmas favourite side worth fighting for an extra spoonful is stuffing, which is transforming beyond the classic guilty pleasure sage and onion mix!

Traditionally made from bread, onion, egg, herbs, and sausage meat, the core ingredients have remained fairly consistent, with some tweaks here and there. For instance, it is elevated by adding dried fruits or formed into balls, deep-fried, and topped with cranberry sauce and goat cheese for a delightful bite-sized treat. Restaurants have also introduced innovative options, such as stuffing flatbreads, which combine sausage, charcuterie, caramelised onions, chestnuts, and cranberries, all smothered in a creamy cheese sauce and garnished with crispy sage. Could we see something similar in retail? How about stuffing pasta as an exciting alternative in the lead-up to the big day?

Clockwise from top left: The stuffing flatbread, **Roe** (London, UK) || Fried stuffing balls with goat cheese and cranberry sauce, **Vermont Creamery** (Vermont, US) || Sausage stuffing with dried figs, **@spoonforkbacon** (Instagram, US) || Stuffing muffins, **Cook's Country** (US)

MAC 'N' CHEESE

Perhaps more commonly found on Thanksgiving tables, mac and cheese is rapidly becoming a star of the show in our Christmas celebrations, too!

Traditionally loved for its rich cheese flavour, it is now commonly enjoyed alongside festive favourites such as turkey, gravy, pigs in blankets, and cranberry sauce, all piled on top! Additionally, it is increasingly served as a creamy dip for holiday toasties, adding an extra layer of indulgence.

Looking ahead, we expect a significant rise in retail options featuring this trend, including Christmas mac and cheese toasties and mac and cheese sprouts. *Yum!*



Clockwise from top left: Turkey meatballs, truffle mac & cheese, creamy turkey gravy, 6-year aged Parmesan, **The Tilbury** (Datchworth, UK) || Pigs-in-blankets mac 'n' cheese, **M&S** (UK) || The Festive Pig – pigs-in-blankets, stuffing, cranberry sauce & crispy onions mac & cheese, **Cheezy Bandits** (Chester, UK) || Festive toastie dipped in mac 'n' cheese, **@bethfrancis0** (TikTok, UK)

THOUGHT STARTERS

- **Global flavours:** our Christmas side dishes have evolved significantly from the over-boiled bland varieties of the past. We are now embracing a variety of global flavours to refresh our traditional favourites. Imagine 'nduja-roasted potatoes, sprouts served with chestnut tahini and sherry-braised parsnips alongside spicy chorizo. Perhaps next year cardamom-spiced potatoes and spicy kimchi carrots will join the lineup?
- **Thanksgiving crossover:** as mac and cheese becomes a desired side dish for our Christmas Day celebrations, we might wonder what other Thanksgiving favourites could make their way across the pond onto our tables. How about a pigs-in-blankets green bean casserole, sweet potato crescent bites served with a creamy dipping sauce, or cornbread stuffing?
- **Format twists:** with sides taking centre stage, it's no surprise that they receive creative format twists to make them even more exciting. Try placing carrots on a bed of garlicky Caesar salad, topped with Parmesan breadcrumbs. Sprinkle stuffing on a flatbread for a heartier option or turn parsnips into a roasted garlic mash - delicious!





FESTIVE-FIED FORMATS

For some, celebrating Christmas is a monthly (or even *bi-monthly*) event, and while many might love indulging in a Christmas dinner every day, others enjoy their favourite foods with a festive twist!

Burgers remain a timeless favourite and transform into festive turkey varieties, complete with all the traditional trimmings stuffed inside. Additionally, two newcomers from last year's trends are gaining popularity: loaded fries topped with pigs-in-blankets, slathered in gravy and finished with stuffing crumble. Or how about festive bao buns, which now feature mince pie inners and soy-poached turkey instead of the traditional marinated pork belly? And don't worry, there is something for dessert lovers, too! Everyday bakery favourites have been reimagined into seasonal treats perfect for enjoying after a walk in the park. Think eggnog cruffins and Christmas pudding cookies - *they just might win you over!*



FESTIVE-FIED FORMATS

BAO
 BURGERS
 LOADED FRIES
 SARNIES
 TOASTIES
 DOUGHNUTS
 SWEET PASTRIES



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
 || Savvy Living

KEY REGIONS:



BAO

The bao (or *baozi*) has gained immense popularity in recent years.

Believed to have been invented in China during the 3rd century, it is now from corner shops and street food vendors to Michelin-starred restaurants... and nowadays at Christmas tables! Traditionally, bao overflows with marinated pork belly, pickled vegetables, and seasoned minced pork, but during the Christmas season, expect to see many festive twists! For instance, sweet variations like mince pie served alongside a puddle of warm custard and modern takes on Christmas dinner that feature soy-poached turkey, pickled red cabbage, sage and onion stuffing crumbs, and a dollop of cranberry sauce. In addition to the creative fillings, the outer buns receive a festive makeover. Looking ahead, thoughts move toward further elaborate Christmas-themed baos, such as beef Wellington and nut roasts, or perhaps colourful Christmas tree designs!



Clockwise from top left: Mince pie bao, **BAO** (London, UK) || Festive bao special containing soy-poached turkey, pickled red cabbage, sage & onion stuffing crumb, and a sweet chilli & cranberry sauce, **Master Bao** (London, UK) || Mini garlic bao balls party pack, **ASDA** (UK) || Santa bao buns, **Waitrose** (UK)



BURGERS

A firm favourite worldwide, the winning combination of juicy meat, hearty carbohydrates, and delectable sauces in one bite is unsurprisingly desirable, especially as it gets a festive twist!

These indulgent creations are known for their bold size and flavour, and they come fully loaded with all the trimmings (*yes, we mean within the burger, not on the side!*). Imagine crispy duck fat potato bits piled on fried chicken, all generously drizzled with cranberry sauce. There's also sage and onion stuffing paired with gooey American cheese and cranberry-red onion jam, topped off with a slice of brie! While most options we've encountered lean toward the savoury side, some opt for the trending swavoury flavour profile. For the adventurous eaters, consider starting the Christmas season with a turkey doughnut burger (*don't worry about the calories - it's Christmas, after all!*).

Clockwise from top left: Smashed beef burger with house made cranberry red onion jam, stuffing patty, and a melty wedge of brie, **Baltic Market** (Liverpool, UK) || Stacked beef patty with gooey American cheese, sage and onion stuffing, crispy fried buttermilk chicken, maple butter mayo, and cranberry jello, **Fat Hippo** (UK) || Fried chicken with bacon and cranberry jam with crispy duck fat potato bits, **Meat The chef** (London, UK) || Turkey doughnut burger, **Borough 22 Doughnuts** (London, UK)

LOADED FRIES

Popularised in America, loaded fries make their way across the pond and further afield this Christmas.

These fries serve as a base to, well, whatever toppings you'd like, and you may notice the overriding theme to these festive-fied formats is piling them high with Christmas meats, all the traditional trimmings, and generous amounts of sauce! For a delicious holiday treat, try seasoned fries topped with pigs-in-blankets, cranberry sauce, and rich gravy to be enjoyed all Christmas season. They're also easy to transform into pre-made supermarket varieties; think loaded with turkey, cheese, and pigs-in-blankets that can be easily baked in the oven or air fryer and served with a drizzle of cranberry sauce or gravy (*or both!*).



Clockwise from top left: Seasoned fries with pork slow cooked in cider, pigs-in-blankets, stuffing, truffle mayo, cranberry sauce, crispy onions and gravy, **Meld** (Rivington, UK) || Festive fries with pulled turkey, honey roasted gammon, pigs-in-blankets and crumbled stuffing, **La Cucina Lounge Deli** (Gateshead, UK) || Christmas loaded fries: gravy mayo, brie, bacon bits, crispy parsnip, cranberry sauce, **Coop Kitchen at The Ship** (Somerset, UK) || Swedish meatballs served with mash or fries, Swedish gravy, lingonberry jam, crispy onions and dill, **Shambles Kitchen** (York, UK)



SARNIES

Thick slices of bread have quickly become the preferred format for enjoying the flavours of Christmas.

And no, this trend isn't just about enhancing your Boxing Day leftovers; these sandwiches have become a major highlight in the lead-up to Christmas. Driven perhaps by Generation Z's love for sandwiches (*coined sandwich season*). In the past month, sandwich shop openings have thrived, leading to seasonal sandwiches becoming a favoured weekend staple!

For the Christmas season, envision thick slices of sourdough and focaccia filled to the brim with turkey, cranberry sauce, and sage and onion mayonnaise - *yum!*

Clockwise from top left: Turkey bagel with cranberry sauce, Brie, rocket and mustard vinaigrette, **Frankly Bagels** (Adelaide, AU) || Beef Wellington focaccia with beef, mushrooms, onions, horseradish mayo, rocket and puff pastry, **Northern Rye** (Newcastle-upon-Tyne, UK) || Smoked chicken, pickled red cabbage, sage and onion mayo and cranberry sauce, **Jolene Colebrooke Row** (London, UK) || Spiced and smoked turkey pastrami, blueberry & cranberry jam, sweet onion & mustard mayo, sharp provolone cheese & bread and butter pickles, **Chatsworth Bakehouse** (London, UK)

TOASTIES

It's time to dust off the toastie machine and get it ready for the festive season!

There's nothing quite as heartwarming as an oozing, cheesy toastie on a cold winter day, especially when dipped into a steaming bowl of tomato soup or gravy (*queue the foggy glasses!*). This Christmas, there are plenty of ways to enjoy them, too. They are a perfect way to use up leftovers for a delightful Boxing Day lunch, making great use of the remaining cheeses and chutneys from our Christmas Day cheeseboards; brie, cheddar and Emmental work wonderfully between two slices of thick bread! The same goes for leftover turkey and stuffing or... well, just about anything as we cram together cheese, chutney, ham, turkey, and stuffing - oh, and we mustn't forget to add a side of gravy for dipping! Plus, timing isn't an issue; the handy air fryer has become the go-to method for making these treats, and they can be ready in just a few minutes!



Clockwise from top left: Sliced turkey, cornbread stuffing, Szechuan pepper gravy, and yuzu white pepper plum jelly, **Any Day Now** (Washington DC, US) || Cheeseboard toastie loaded with Barbers cheddar, Emmental and Red Leicester, cheesy béchamel and a Christmas port and onion chutney, **M&S** (UK) || Holiday toastie with tender ham hock, French onion, seeded mustard & English cheddar in house baked bread, **Maker Coffee** (Melbourne, AU) || Air fryer turkey & ham toastie, **@boredoflunch** (TikTok, UK)



DOUGHNUTS

For those with a sweet tooth, there is plenty to enjoy this festive season!

In recent years, doughnuts have become a favoured choice and can easily adapt to the changing seasons. Driven by consumers' lifestyle preferences and recurring weekend trips to bakeries (*often as a treat to a refreshing walk*), there is a growing interest in reinventing beloved Christmas flavours in new formats.

Glazes can infuse with classic flavours like eggnog and mulled spices. Toppings such as crushed gingerbread and chunks of homemade stollen add a traditional touch and delightful texture. The fillings are just as important; consider creamy chocolate mousse, pear compote, or perhaps a filling of creamy speculoos pudding if that's more your preference!

Clockwise from top left: Christmas doughnut collection, **Brammibal's Donuts** (Berlin, Germany) || Mulled spiced, chocolate orange and speculoos doughnuts, **Crosstown** (London, UK) || Eggnog, red velvet, holiday candy shop and lump of coal doughnut, **Deviant Donuts** (Connecticut, US) || Doughnut tree tower filled with custard, **Brown Sugar** (Colombo, Sri Lanka)

SWEET PASTRIES

Alongside the interest in doughnuts, sweet pastries play a significant role in Christmas celebrations, too!

Likewise, the leading theme here is the fusion of classic bakes with modern takes as bakers experiment with recreating traditional Christmas favourites. The love-it-or-hate-it Christmas pudding is being introduced to new audiences with added indulgence. For instance, spiced cookie dough filling, rum caramel, custard, and a chocolate drizzle. Additionally, seasonal flavours, such as cranberry jams and warming rice vanilla pudding, contribute to these delightful creations.

Furthermore, the possibilities are endless in retail and bakeries around the world. Perhaps next year, we will see an increase in panettone cruffins, gingerbread sourdough, and Christmas trifle buns - *stay tuned!*



Clockwise from top left: The Christmas pudding crookie, **Half Dozen Other** (Manchester, UK) || Creamy cheesecake filling, tart cranberry jam, graham cracker crusted croissant dough, **Librae Bakery** (NYC, US) || Rice vanilla pudding mixed with white chocolate cremeux, sour cherry broken gel and toasted almonds on top, **Bread By Kaerup** (Aalborg, Denmark) || Flaky croissant tart, orange marmalade, thick custard, finished with fresh cranberry jam, **Hart Bageri** (Copenhagen, Denmark)

THOUGHT STARTERS

- **Bao chicka wow wow:** not your usual lead-up to Christmas festive format, baos are becoming a popular option to get us in the Christmas spirit. These delicious buns are packed with soy-poached turkey and overflowing with mince pie inners. Furthermore, the opportunity is abundant for additional creative sweet and savoury variations, such as hoisin ham hock or eggnog filling (*you might want a napkin for that one!*).
- **Load 'em up!:** just as festive burgers continue to reach taller heights, indulgent loaded fries have become a standout option this year. Piled high with all the trimmings and more, could we see this trend develop even further? Imagine loaded fries topped with turkey, ham, and beef, or even a twist on the classic chip butty with loaded fries squashed between two thick slices of bread - why not!
- **Smaller indulgence:** while showstopper desserts will always have a special place during Christmas, a movement towards baked goods become favoured by the younger generation. Is visiting a bakery to enjoy seasonal delights and bringing them home to savour the new Christmas pudding?





FUN & CHEEKY

Just like the return of the mischievous ‘elf on the shelf’ that creates chaos in the early hours, the magical spirit of Christmas brings out a playful side in all of us!

The festivities are in full swing as adorable animals and favoured festive figures easily adapt to current trends – think Santa bao buns, for instance! The *kitschmas* influence goes beyond mismatched decorations, tinsel, and 90s nostalgia; it extends into food and drinks as consumers seek pure childhood joy and celebration. Picture bright green candy floss cocktails, traditional festive punch, and colourful lights transformed into delicious chocolate. Similarly, this fun and cheeky trend highlights our desire for enjoyable experiences. After all, why consume a mince pie at home when you can visit a secret pop-up window instead? Or why not watch a holiday episode of Friends and try your hand at recreating Rachel Green's infamous trifle? That's sure to bring a smile even to the most Scrooge-like individuals!



FUN & CHEEKY

HAPPY KITSCHMAS
 CUTESY ANIMALS
 FESTIVE FIGURES
 PICKY TREE
 MERRY MARKETING
 QSR MERCH



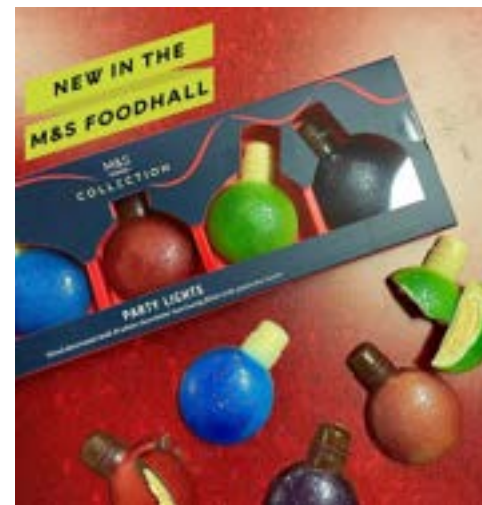
TFP TREND ALIGNMENT: Adapt to Thrive || Savvy Living || Simply Delicious

KEY REGIONS:       

HAPPY KITSCHMAS

It's not just decorations moving away from the traditional red and green colours; embracing disco balls, vibrant hues, and 90s nostalgia extends to our food as well!

The iconic 90s colourful lights that used to adorn Christmas trees and fireplace garlands are now inspiring chocolate treats. Punch bowls look to ditch the ice and champagne for holiday harvest drinks filled with seasonal delights such as cranberries, apple cider and apple brandy, ready to scoop into brightly coloured paper cups and sip with candy cane straws. Or, if you prefer something even more merry, consider a bright green glittery drink topped with candy canes and green cotton candy! Overall, this trend taps into a desire for nostalgia and childhood joy. So, why not decorate your Christmas tree with mismatched ornaments, enjoy a sparkling cocktail, and indulge in Santa-themed chocolate bark? Embracing the kitsch has never been cooler!



*Clockwise from top left: Colourful light bulb chocolates, **M&S** (UK) || Holiday harvest punch, **Sur La Table** (US) || Grinch mimosas containing orange juice, prosecco, blue Curaçao and edible green glitter, topped with green candy floss, **@liv.yah** (TikTok, Germany) || Christmas chocolate bark, **Cadbury** (UK)*



CUTESY ANIMALS

An olive penguin wearing a ham scarf with carrot feet? Count me in!

Christmas wouldn't be complete without a selection of adorable animals, and this year features some outstanding contenders! Following the viral fame of Pesto the penguin, it seems that penguins are the animal of choice this season. Imagine olive penguins sporting scarves and enjoying a ride down a mashed potato mountain...*Adorable!* In addition to penguins, foxes and bears are also popular, with a preference for anything cuddly! Looking ahead to next year, we can expect more unusual animals to take the spotlight, such as the famous smiling quokkas, hedgehogs, and Moo Deng the hippo receiving a Christmas twist!

Clockwise from top left: Christmas penguin canapés with ham scarves, **@sainsburysmag** (Instagram, UK) || Olive penguins on mashed potato slopes with ski crackers, **@celineyrs** (Instagram, South Korea) || Coconut and caramel foxes, **@yanncouvreur** (Instagram, France) || Teddy bear Christmas chocolate collection, **La Pâtisserie Cyril Lignac** (Paris, France)

FESTIVE FIGURES

Beyond cute animals, festive figures provide endless possibilities for the season and beyond.

Traditional decorations like wreaths, snowmen, and Santas trend; however, these shapes can continuously adapt for a fresh take. For example, you could create snowmen out of delicious cheesecakes, substitute traditional pine in wreaths with smoked Brussels sprouts, or twist Santa by making them the faces of festive bao buns. This trend encourages creativity and offers an easy way to elevate supermarket favourites at a lower cost. Household favourite pizza can effortlessly transform with a snowman-shaped burrata topping, profiterole Christmas trees can become an impressive centrepiece for holiday dinners, and star-shaped gnocchi can make a perfect, easy festive meal for those lazy, chocolate-filled stomachs and sore heads associated with Boxing Day celebrations.



Clockwise from top left: Red berry cheesecake snowman, **Perch** (Birmingham, UK) || Smoked salt Brussels sprout wreath flatbreads, **@milliesdishes** (Instagram, UK) || Christmas bauble, **Pettigrew Bakeries** (Cardiff, UK) || Santa banana pudding, **Blue Pear Pie** (Osaka, Japan)



PICKY TREE

The first signs of Christmas are often marked by when the tree goes up (*though for some enthusiasts, this can happen as early as November!*), and in this case, the festive season brings with it some fun and whimsical edible options, too!

An impressive centrepiece for any Christmas table, edible trees stand tall among the holiday treats. Trusty cheese formats are always a crowd-pleaser, with garlicky Boursin shaped into festive forms, complemented by olives and rosemary sprigs for scooping with crackers. Additionally, cheesy tree rolls offer that delightful cheese pull we're all after. Just like the classic pairing of cheese and biscuits for Christmas grazing, charcuterie (or should we say 'charcutertree') is a deliciously simple choice certain to reduce height in seconds! While many of the edible centrepieces we see are inspired by viral trends, could we find pickle trees on supermarket shelves next year?

Clockwise from top left: Pickle tree, @thesassybarn (Instagram, US) || Five ingredient edible Christmas cheese tree – garlic & herb cream cheese, stuffed olives, rosemary, pomegranate seeds & cheddar star, @jemmaloi (TikTok, UK) || Charcuterie-tree, @cary_ashley_ (TikTok, US) || Cheesy Christmas tree rolls, @evite (TikTok, US)

MERRY MARKETING

This year, Christmas is not just about the taste of food but about how we experience it!

Driven by Generation Z and the influence of social media, creating memorable (*aka Instagram-able*) experiences has become an excellent marketing strategy. A Christmas coffee and mince pie are certainly delicious, but imagine having them dished out for free from a tiny hatch for one day only - *now that's incredible!* Going out to buy pigs in blankets? Why not have them delivered to the front door! Making a trifle? Give the *Friends* themed 'Rachel trifle' a go? Unique experiences offer endless opportunities; next year, could we see an interactive mince pie topping event in supermarkets or a one-day-only movie-inspired hot chocolate day featuring elf marshmallows and Grinch-themed white chocolates? *Get there early to avoid the queues!*



Clockwise from top left: Magical mince pie window in Birmingham, **Sainsbury's** (UK) || **HelloFresh** is bringing Rachel's iconic trifle to your holiday table (US) || **Aldi** is launching a pigs-in-blankets delivery service in London (UK) || Mayonnaise blanc – a limited edition gifting wine bottle containing a jar of mayonnaise, **Hellmann's Mayonnaise** (US)



CHRISTMAS MERCH

Many QSR restaurants and brands embrace fun and interactive merchandise to extend the Christmas season and spark engaging conversations via social media.

In addition to Christmas-themed menus featuring items like turkey burgers and cinnamon-spiced hot drinks, customers can now enjoy their favourite festive treats with an extra dose of holiday cheer. Fast-food chains are introducing Christmas jumpers and pyjamas for their fans, while some collaborations are bringing interactive storytelling to life through animation, with an opportunity to receive rare enamel pins! They're perfect for gifting, too. Do you have a ranch-dressing enthusiast in your friendship group? Why not bring laughter with a Christmas card featuring a hidden surprise inside? It's a fun way to celebrate the season and is a great marketing tool for future inspiration!

*Clockwise from top left: **KFC** Christmas clothing merch (US) || **McCafé x Doodles** collectible holiday cups (US) || **Chick-fil-A** sweatshirt holiday collection (US) || **Hidden Valley Ranch** cards with a hidden surprise of zesty, tangy, creamy ranch sachets (US)*

THOUGHT STARTERS

- **Elevated experience:** fueled by the younger generation and the desire for unique experiences, consumers seek more than traditional festive flavours. They want to enjoy a mince pie from a pop-up food hatch and gather with friends to recreate the iconic trifle from Friends! The future holds endless possibilities; for example, one-day-only mince pie topping events or offer a DIY kit to re-create Buddy the Elf's infamous spaghetti dessert! Be prepared to sell out!
- **The kitschier, the better!:** gone are the days of simple greens and reds - consumers now crave vibrant disco balls, flashing lights, and an array of mismatched decorations - including baubles that resemble favourite cocktails and baked goods such as croissants adorned with colourful sprinkles! Our food reflects this trend also. Imagine a BRAT bright green dessert filled with popping candy or a disco ball punch bowl featuring an edible glitter cocktail.
- **Shape of Christmas:** no holiday season is complete without an assortment of festive figures. This year, favourites include snowmen, Christmas trees, and penguins. But what if we saw some more unique animals, such as otters and koala bears, getting a festive twist?





SWEET REINVENTED

Fun and cheekiness continue to characterise the world of desserts and sweet treats, playing with form and flavour to produce some seriously irreverent takes.

Classic Christmas treats retain their familiarity through flavour and presentation in new forms. The mince pie changes pastry and texture entirely – inspiring spreads to sheer indulgence. Similarly, as consumers look for alternatives to tradition, the iconic Christmas pudding inspires bakes and no-bake takes, whilst pre-made puds allow quick, convenient, custom twists. Bûche de Noël become works of art that range from traditional to surreal, drawing flavours from chocolate to the tropics. Panettone and gingerbread inspire savoury takes and cocktails, trifles encourage creativity with a familiar format, ice cream offers cool new riffs on tradition, and showstopping centrepieces bring a feast for the eyes!



SWEET REINVENTED

MINCE PIE

CHRISTMAS PUD

BÛCHE DE NOËL

PANETTONE

GINGERBREAD

TRIFLE

ICE CREAM

SHOWSTOPPER CENTREPIECES



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:





MINCE PIE

With their satisfying texture, sweetness and blend of spices ensconced in short, buttery pastry, mince pies are a flavour and texture profile being transposed to new, indulgent creations.

The bittersweet velvet innards of brownies are stuffed with whole mince pies, bringing both textural contrast and complementary flavours of orange, cinnamon, raisins and brandy. The laminated layers of croissant pastry remain on par when it comes to butter content, texturally reinvented with its crisp and billow layers, concealing apple and brandy mince. The distinct floral acidity of yuzu breathes new life into mince pie tarts with a cinnamon cookie base, finished with a drifting of powdered sugar. But for those of us who want to bring a schmear of mince pie flavour to whatever we like (or straight from the jar) there's mince pie peanut butter!

Clockwise from top left: Mince pie-stuffed brownie, **Aldi** (UK) || Yuzu fruit mince tarts with cinnamon cookie, **Tokyo Lamington** (NSW, AU) || Apple & brandy mince in croissant pastry, **Fera Bakery** (Belfast, UK) || Mince pie-nut butter, **Manilife** (UK)

CHRISTMAS PUD

Illustrative of the wider departure from tradition, the iconic Christmas pud has inspired a whole raft of riffs. Keeping the same signature spices, the texture becomes the most common thread here.

Scones offer the same comforting aromas of Christmas pudding, warm from the oven and slicked with brandy butter to have with afternoon tea. Sticky toffee pudding gets a festive, fruity reconfiguration, enrobed in an ooze of sticky sauce. The Italian classic that's been trending for some time, panettone, comes into the festive fold with tiramisu. Slabs of pre-bought Christmas pudding are layered with vanilla mascarpone custard and finished with cocoa, offering an easy and moreish dessert. Whereas lovers of Christmas and rocky road riffs rejoice, with a combination of the two, made to resemble a traditional Christmas pudding, packed with cherries and ginger biscuits, white chocolate icing and frosting decoration, @janespatisserie (Instagram, UK)



Clockwise from top left: Christmas pudding flavoured scones using oat milk, **National Trust** (UK) || Christmas pudding tiramisu with mascarpone vanilla custard, @johuczek (Instagram, AU) || Sticky toffee Christmas puddings, @sarahshealthykitchen (Instagram, US) || Rocky road Christmas pudding with ginger biscuits, glacé cherries, dark & milk chocolate, white chocolate icing and frosting decoration, @janespatisserie (Instagram, UK)





BÛCHE DE NOËL

With the proliferation of classical French cookery and with many consumers looking for a Christmas pudding alternative, it's no surprise that the Bûche de Noël trends significantly this Christmas.

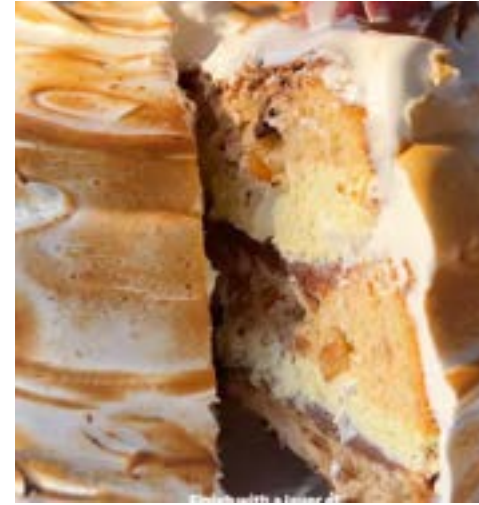
Again, we're seeing extraordinarily intricate works of art depicting a surrealist vision of tundra-swept polar bears filled with fresh pear, maple syrup caramel, Madagascan vanilla mousse and tonka bean. However, other creators' inspiration migrates to warmer climes. Yule logs, bright with mango and a mirror-like glaze, stow a chunky compote of mango within, on a sponge base and sealed in with mango mousse. Indulgent chocolate versions feature the classic log, draped thickly with dark chocolate frosting, adorned with Hershey's Kisses-like Christmas trees. Meanwhile, for something simpler on-the-go, a thick and frosty Yule log shake brings the same satisfaction in a sip!

Clockwise from top left: Single origin feuilletine log cake, **La Levain** (Singapore) || Polar bears in an arctic tundra with fresh pears, caramel with maple syrup, vanilla mousse from Madagascar & tonka bean, Pâtisserie **Yann Couvreur** (Paris, France) || Chocolate Yule log shake, **Shake Shack** (US) || Mango Bûche de Noël, **Escargot Bakery** (Victoria, AU)

PANETTONE

Yet another iconic Christmas sweet treat from Italy, panettone not only remains predictably popular with Italians but is the source of inspiration for drinks and other dishes, both sweet and savoury.

Layered slices of panettone form the layers of a tiramisu cake featuring the requisite coffee but with pistachio mascarpone between generous, silky slicks of hazelnut spread cloaked in mallowy torched meringue! White rum left to infuse with panettone forms the basis of a spiced daiquiri, taking fat washing to a whole new level. When it comes to savoury slants, pine nut-punctuated panettone comes packed with cheddar cheese, whilst leaning more towards a 'swavoury' split. Honey and the soft, warm notes of vanilla accent a panettone of black olives, capers and dried tomatoes, opening up new possibilities for leftovers!



Clockwise from top left: Tiramisu cake using layers of panettone infused with coffee, layered with pistachio mascarpone, chocolate & hazelnut spread, finished with torched meringue, @dessertislanddishes (Instagram, UK) || Spiced panettone daiquiri using panettone-infused white rum, Baba's Place (Sydney, AU) || Pine nut & cheddar cheese panettone with extra-stretch mozzarella topping, Anchor Food Professionals (Singapore) || Panettone with honey, vanilla, olives, capers & dried tomatoes, LùBar (Milan, Italy)



GINGERBREAD

A stalwart piece of Christmas pastry work, gingerbread continues to inspire new iterations, its distinct flavour so evocative of Christmas and the colder months.

The classic gingerbread figures contain a gingerbread praline combined with 45% organic milk chocolate, echoing consumer calls for quality and sustainability. Whereas chocolate Viennese fingers sandwich a satin layer of buttercream, lumpen with stem ginger and imbued with the syrup, before being dipped in chocolate. Thick gingerbread stars arranged into a Christmas tree topped with one extra make a stunning display ideal for when you've got company and tea to pour. When it comes to tipples, the bittersweet pairings continue with gingerbread espresso martinis served with *cioccolato al forno*, for an opulent late-night treat to fuel a late-night leftover sandwich session.

Clockwise from top left: Double chocolate stem ginger Viennese fingers, **@theboywhobakes** (Instagram, UK) || Homemade gingerbread praline with organic 45% milk chocolate, **Fosch** (Stockholm, Sweden) || Seasonal special gingerbread Pepsi, **Pepsi** (US) || Gingerbread espresso martini with cioccolato al forno, **OTO** (Reykjavík, Iceland)

TRIFLE

Some say it's the British tiramisu, others, an abomination – trifle is not to be trifled with. Another potential usurper of the Christmas pudding, trifle is eminently shareable, customisable yet still familiar.

Strawberry marsala jelly and lemon curd surround spools of strawberry roulade, and blankets of cream cheese Chantilly. A topping of lemon custard gelato and strawberry sorbet sits beneath interlocking domes of crisp meringue. A Christmas trifle cake swaps strawberry for raspberry, swirled with raspberry gel and white chocolate mousse, adorned with passionfruit compote, fresh blueberries and strawberry chunks. Panettone forms the sponge for other recipes, packed with fresh, juicy white cherries, peach, raspberries, blueberries and mint. Meanwhile, tiramisu made with chocolate sponge and caramel shows the ongoing influence of Italian desserts this Christmas.



Clockwise from top left: Trifle with strawberry marsala jelly, lemon curd, strawberry gel, strawberry roulade, cream cheese Chantilly, lemon custard gelato, strawberry sorbet & vanilla meringue, **Gelato Messina** (Sydney, AU) || Christmas trifle cake with custard, vanilla sponge, raspberry gel & white chocolate mousse; finished with passionfruit compote, fresh berries & handmade white chocolate bows, **Bam Bam Bakehouse** (Gold Coast, AU) || Panettone trifle with white cherries, peach, raspberries & blueberries, finished with mint, **@inlydiaskitchen** (Instagram, AU) || Chocolate tiramisu trifle, **@donalskehan** (Instagram, ROI)



ICE CREAM

At a time of the year when keeping warm is the goal, for many this year, chilling out is preferred instead, as ice cream impacts the dessert trolley significantly.

Bombe ice cream cakes are delicious Trojan horses on our tastebuds, a dessert once again resembling the iconic Christmas pudding. A chocolate sponge dome reveals layers of cookie dough separated by more chocolate sponge, riddled with cherries and meringue. Others simply mix vanilla ice cream with brandy-steeped fruit. Geometric details come back into play with a pandoro-layered ice cream cake with bacio, chocolate, hazelnut and even pandoro gelato, fudge, cherry jam, and chocolate semifreddo covered in a matte chocolate sprayed shell. Elsewhere, more natural shapes are formed with a stunning Yule log made with coffee and chocolate ice cream with a pinecone flourish.

Clockwise from top left: Chocolate bombe ice cream cake using chocolate cookie dough ice cream, chocolate sponge, cherries & meringue, @clareepls (Instagram, UK) || Ice cream cake with pandoro cake, bacio gelato, chocolate fudge, hazelnut gelato, cherry jam, chocolate gelato, chocolate fudge, pandoro gelato, morel cherry jam & a final layer of coconut gelato, encased in a chocolate semifreddo, finished with a milk chocolate shell, Pidapipo (Melbourne, AU) || Ice-cream bombe with brandy-soaked fruits, The Pudding Kitchen (Somerset, UK) || Chocolate & coffee ice cream Yule log with chocolate cake, chocolate crunches, milk chocolate ganache 'bark', shortbread cookies & matcha chocolate pinecone garnish, The Franklin Fountain (Philadelphia, US)



SHOWSTOPPER CENTREPIECES

Yet, it's not just savoury dishes that inspire stunned silence or elicit gasps, woops or moans – desserts are their very own event.

Yule logs radiate elegance – both scent and scene – with a jasmine-infused sponge encasing the warm tingle of ginger and a pear compote, finished with beautifully hand-crafted white chocolate leaves. With a playfulness on the outside that belies a serious amount of chocolate within, a take on the classic *Bûche de Noël* sees a toy soldier figurine of immaculate detail, shimmering with gold. More avante-garde slants produce geometric works of art. Razor-sharp lines of a cuboid filled with gianduja hazelnut puff, almond biscuit and dark chocolate infused with bay leaf and Grand Cru de Cameron. Or a stunning interpretation of a Christmas tree with a glittering ombre colour scheme.

Clockwise from top left: Yule log of jasmine-infused sponge with ginger, pear compote & white chocolate leaves, **La Dame de Pic** (London, UK) || Chocolate *Bûche Noël* sprayed gold, **Chocolate Molecule** (Dubai, UAE) || Gianduja hazelnut puff, almond biscuit & dark chocolate with bay leaf, Grand Cru de Cameroon dark chocolate mousse, **Maison Jean-Paul Hévin** (Paris, France) || Layered chocolate Christmas tree with edible glitter, **@dinarakasko** (Instagram, US)

THOUGHT STARTERS

- **Mince Pie 3.0:** so much of the mince pie trend hinges on a change of dough. To this end, why not transpose it all to a Belgian waffle, running the fruit through the batter and topping with brandy butter?
- **Panetoasties:** as panettone trends, being used as sponge layers to cocktails, why not take a couple of slices, butter them and fill them with fruit mince or squares of dark chocolate and a dollop of mascarpone and make a toastie?
- **Something to trifle with:** with such a creative approach being taken to festive trifles and with convenience still a priority, things like Welsh cakes or Eccles cakes would make brilliant sponge replacements. Soaked in sherry or whatever you fancy, these could be layered with eggnog custard and finished with Baileys cream!





DRINKABLES

Seasonal spice leads the way as a go-to flavour profile for beer, coffee, choc and more.

With all that festive food on offer, you're gonna need something to wash it all down! Luckily, there's plenty of choice at hand, from non-trad takes on wintry mulled drinks to botanical beers packed with hoppy hedgerow flavours and touches of spice. Indeed, spice is a recurring theme found across coffee, hot choc, chai and more where seasonal cinnamon, clove and nutmeg form a winning combination. Stouts have seen a surge in popularity (leading to a national shortage in some parts of Europe!) as have orange, Greek, English and other alt wines. The festive season brings with it a spate of fun Yuletide cocktails, and this year bitter & sour cocktails are firm favourites. But fun doesn't have to come with a high ABV; low & no options turn to functional ingredients to give a heightened experience without the dreaded hangover.



DRINKABLES

NEW MULLED

STOUTS

BOTANICAL BEERS

BITTER & SOUR COCKTAILS

SPICED COFFEE

CHAI

HOT CHOC

LOW & NO

ALT WINES



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Empowered Self

KEY REGIONS:



NEW MULLED

Looking to refresh your drinks menu? Mull it over.

Mulled white wine is nothing new. Glühwein, gløgg and kuhano vino can all be found in white form, but outside of Central Europe and Scandinavia it remained a relative novelty. Until now.

M&S' recent ready-to-drink launch has thrust this lighter libation into the spotlight, with indie operators creating their own riffs using orange wine and elevated single grape varieties (e.g. Top Cuvée's gamay-based offering "made using a slow infusion process so the wine retains its freshness"). Cider, mead and perry are given seasonal spice makeovers, while mulled teas – blended with wine and/or spirits – bring a grown-up, dairy-free take on chai. Mulled margaritas, negroni and other cocktail combos hit bars while the signature flavour forms limited edition soft drink specials.



*Clockwise from top left: White mulled wine, **M&S** (UK) || Mulled blackberry, pear & cranberry juice drink that can be served hot or cold, **Ocean Spray** (US) || Mulled sake – Futsushu sake, red wine, plum liqueur, festive spices & freshly squeezed orange juice, **Robun** (Bath, UK) || Mulled house cider with Grand Marnier, Bourbon & citrus, **Any Day Now** (Washington DC, US)*



STOUTS

‘Genzennials’ fuel a surge in demand for the black stuff.

This festive season UK pubs face a shortage of Guinness, thanks to a 20% rise in demand over 2023. Why? According to the BBC, Gen Z and Millennials are the driving force, ditching their Aperol spritz for a chance to ‘split the G’.*

Craft breweries have embraced this uptick in demand, creating wildly inventive brews with a Yuletide tinge. From chocolate orange to peppermint candy, Christmas pudding to eggnog, malt rich stouts are bringing winter warmth to bars and homes across Europe and the US... *literally* so, in the case of the mulled Guinness served at its own Gravity Bar in Dublin. Milk stouts (those with added lactose) are particularly popular, paired with chocolate for a lasting sweet finish, as are nitro-infused draft pours.

*A social media trend that involves taking a perfectly judged first mouthful of Guinness, in order to leave the remaining head perfectly bisecting the ‘G’ on a branded pint glass.

Clockwise from top left: ‘De Le Terry’ chocolate orange stout (4.5% ABV), **Mad Squirrel** (Hemel Hempstead, UK) || Christmas cookie & stout combo tin, **Guinness x Levain** (NYC, US) || ‘Fairytale of Brew York’ pistachio & sweet cherry Florentine milk stout (4.9% ABV), **Brew York** (York, UK) || Fire Place (maple syrup, cinnamon & orange winter stout; 7% ABV) & Christmas Pudding (raisin, cherry & chocolate pastry stout; 6.2% ABV), **NePO Brewery** (Szkardowo, Poland)

BOTANICAL BEERS

Horticultural hipster heaven this holiday season!

Appetite for super-hoppy brews has exploded in recent years as the multifarious variants of IPA (double, triple, West Coast, New England...) monopolise craft brewery output. The bitter, grassy flavour of the hop is increasingly paired with 'green' botanicals, such as pine and spruce, mugwort (historically used instead of hops), wormwood, and juniper – all of which are abundant in the winter months and complement the astringency of the hop.

Saisons, too – traditionally a warmer weather tipple – are given a wintry botanical makeover through the inclusion of herbs, spices and secondary grains, and brewed stronger for a heavier finish. While the sweet Yule flavours of dried fruits and warming spice find a perfect foil in über-trendy sour ales that balance their sugar with lip-puckering tartness.



*Clockwise from top left: Artemesia saison brewed with mugwort and wormwood (5.6% ABV), **Sante Adairius Rustic Ales** (California, US) || Victory or Death Christmas Red IPA – featuring orange peel, spruce & juniper (6.7% ABV), **13 Stripes** (South Carolina, US) || A'lotta Horchata – horchata smoothie sour ale brewed with cinnamon, vanilla & sweet rice (6% ABV), **Thick-n-Thin Brewery** (Maryland, US) || Spruce It Up – classic saison layered with spruce & pine (5% ABV), **Vocation Brewery** (Hebden Bridge, UK)*



BITTER & SOUR COCKTAILS

May your days be merry and bright... and your cocktails be bitter and sour.

The negroni and pisco sour (and endless derivatives thereof) were the standout cocktail profiles of the summer; as we roll into winter those sour and bitter notes are as ubiquitous as ever – this time, with a seasonal twist!

Think cranberry, gingerbread, nuts, cinnamon and pine; all the flavours of Christmas twisted up into fat-washed, cryo-concentrated cocktails using homemade syrups and, in the case of sours, that on-brand snow-effect head of whipped up egg white. So forget the sherry, we're sure Santa would much prefer a mince pie negroni this Christmas Eve.

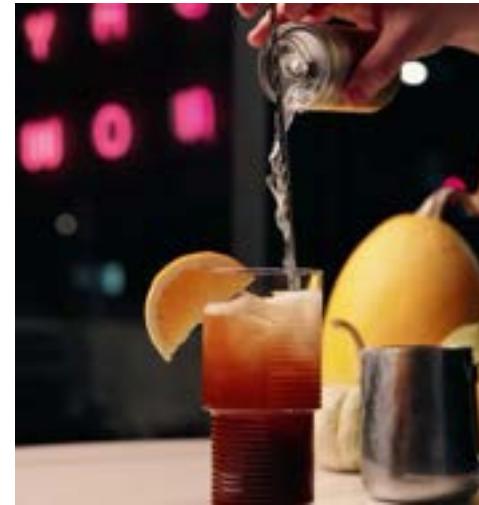
Clockwise from top left: The Santa Sour – pisco, Aperol, lime juice, egg white & cranberry, **Sumaq on 17th** (Calgary, Canada) || Frosty Fir negroni containing Monkey 47 gin, Frangelico & pine liqueur, **Jigger & Pony** (Singapore) || Winter spiced sour – Bombay Bramble gin, lemon, Orgeat, egg white, **Fountain Lane** (Belfast, UK) || Mince pie negroni – gin, fat-washed in mince pie filling & pastry and aged for 6 weeks, Campari & Byass Gonzalez La Copa Vermouth Rojo – served with a mini mince pie garnish, **Furna** (Brighton, UK)

SPICED COFFEE

Cinnamon, clove and cardamom: coffee's new BFFs.

The PSL (that's 'pumpkin spice latte', *boomer*) is now as much a part of winter drinking habits as mulled wine and eggnog. The cinnamon, nutmeg and clove combo is a seasonal highlight for many coffee lovers, and now that caffeinated spice pairing is finding further love in cold format.

Trader Joe's recently launched vanilla and cardamom cold brew steps away from overly sweet PSL to a singular spice profile that echoes much-loved Arabic qahwa; this cold brew approach (which produces less bitterness) has also been championed by YouTuber Bobbi Parrish, who has a combined social media following of over 10 million. Elsewhere we see refreshing spiced coffee-tonic combos, and spiced coffee cocktails, including cardamom, clove and cinnamon-rich takes on the espresso martini.



Clockwise from top left: Orange cardamom espresso tonic, **Any Day Now** (Washington DC, US) || Vanilla & cardamom ready-to-drink cold brew, **Trader Joe's** (US) || Pumpkin spice espresso martini – Kalak single malt vodka, pumpkin, cinnamon, nutmeg & clove, topped with pumpkin spice cold foam, **Starbucks Reserve** (NYC, US) || Cardamom, fresh ginger, cinnamon, nutmeg & vanilla cold brew topped with eggnog, **@BobbiParrish** (YouTube, US)



CHAI

Chai has emerged as this year's big tea tippie.

The spiced tea blend – with and without milk – is being used to flavour coolers, cocktails, hot chocolates and, of course, the ubiquitous chai latte... and that's just the drinkables. As a flavour profile it's enjoying wider favour in baked goods and desserts, its warm, sweet signature proving the perfect foil for rich dairy.

Chai lattes are being upgraded with secondary flavours (apple pie chai, anyone?), while the dirty chai receives more complex makeovers, blended with einspanner and Vietnamese coffees. The spice mix transitions easily into seasonal 'mulled' offerings, while chai is enjoying a real moment as both a cocktail ingredient and flavour profile, used in sours, bitters, and yes, the ubiquitous negroni.

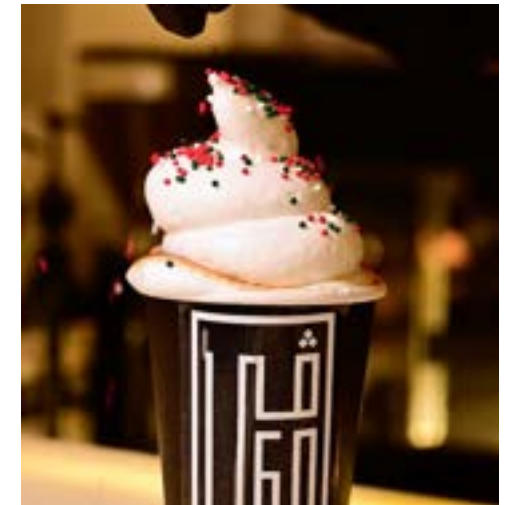
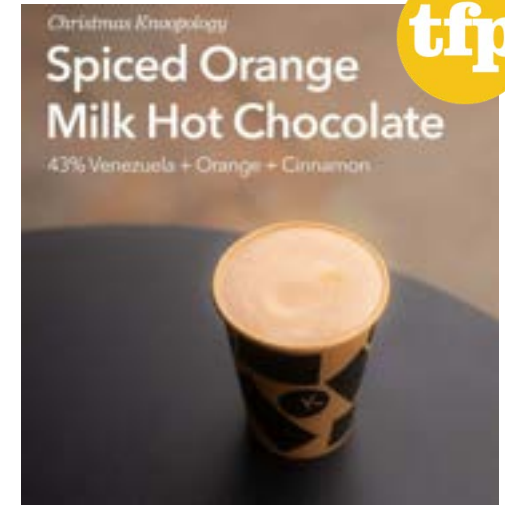
Clockwise from top left: Slow-drip Vietnamese coffee with condensed milk, topped with vanilla chai latte-infused creamer, **blk dot** (California, US) || Demerara rum, chai-spiced rooibos tea, Pedro Ximenez sherry, cream, **Tonic** (Worcester, UK) || Mulled tea containing assam, star anise, cinnamon, clove and orange, **Hardware** (Liverpool, UK) || Chai sour – chai-infused vodka, lemon juice, rosehip-elderberry syrup, egg white, **Bar Payne** (Edmonton, Canada)

HOT CHOC

Warm spice and decadent textures up the ante for this forever festive favourite.

A classic winter warmer, this year hot chocolate goes fluffy as it's all about house-made toasted marshmallow fluff and deeply decadent single origin chocolates. The so-called 'New York hot chocolate' can be found across the globe, inspired by NYC's *Glacé* and its s'mores chocolate cup – a ring of toasted marshmallow piped around the rim of the cup, originally topped with a s'mores cookie but now subject to flavour plays from peppermint candy cane to crème brûlée.

The quality and provenance of cocoa used is a key call-out as operators state the country of origin and cocoa solids percentage of their drinks, while the use of warming spice is the standout flavour profile, from gingerbread to spiced orange to mince pie and Christmas pudding flavours.



Clockwise from top left: New York's viral marshmallow fluff hot chocolate – pictured, candy cane s'mores flavour, **Glacé** (NYC, US) || Spiced orange milk hot chocolate with 43% Venezuela cocoa & cinnamon, **Knoops** (London, UK) || 'New York Christmas hot chocolate' with torched marshmallow fluff topping, **V60 Café** (Damascus, Syria) || Mince pie hot chocolate – cinnamon, star anise & orange, **Hotel Chocolat** (UK)



LOW & NO

A new generation of alcohol-free options replace ABV with added functionality.

It's well documented that sober curious drinking is on the rise, and Christmas is no exception as consumers look for ways to embrace the festive spirit without fear of next-day repercussions. 0% cocktails are a common addition to bar menus and new no- and low-alcohol beers, wines and spirits are constantly entering the market (e.g. Casillero del Diablo Zero sparkling wine, released just in time for Christmas). Among the spirit-adjacent offerings a trend has emerged for the addition of functional ingredients; Little Saints' line of spirits contain lion's mane and reishi mushrooms, which are said to inspire creativity and promote calm, respectively, and damiana flower to increase sociability, while Three Spirits' 'Livener' makes use of caffeine-rich guayusa for increased focus.

Clockwise from top left: Non-alcoholic mulled wine alternative, a mixture of organic fruit juices and spice, **Luscombe** (UK) || St. Juniper 0% botanical gin-style spirit containing juniper, birch, angelica root & cardamom, as well as lion's mane and damiana to enhance cognition and mood, and encourage social interaction, **Little Saints** (US) || Dirwest – a small batch gin-aligned zero alcohol botanical spirit from Wales containing black pepper, juniper & orange, **Dirwest** (UK) || Sober-curious Christmas hamper containing RTD picante cocktail, tropical functional spirit & élat sparkling wine, available at **Delli** (UK)

ALT WINES

We wish you an orange Christmas ...

Attitudes are shifting as to when, and with what, certain wines should be consumed. Tannin-rich full-bodied reds are giving way to lighter styles, with the grand vineyards of France, Australia, Italy, et al losing ground to long-overlooked producers from Japan, East Coast US, Greece and Eastern Europe. Rosé has moved from summer staple to year-round favourite and orange wines have enjoyed a meteoric rise in popularity, moving from hipster tippie to mainstream hero, while Champagne's dominance has been challenged by a marked interest in pét nat alternatives. In the UK, wine merchant *Majestic* has predicted a 33% growth in sales of English wines, and 50% rise in Greek offerings as consumers look for something that little bit different to pair with their Christmas turkey.



Clockwise from top left: Locally-made Cornish orange wine on the Christmas wine menu at **The Orgia** (Falmouth, UK) || Organic sparkling Sicilian Grillo in a can, **Vinca** (UK) || Christmas pizza pét nat pairing, **Love Supreme Pizzeria** (Sydney, AU) || 'Irresistible Assyrtiko', the supermarket's first Greek wine offering, **Co-op** (UK)

THOUGHT STARTERS

- **How low can you go?** As increasing numbers choose to steer clear of alcohol through the festive season, demand for low and no options rises. Is there opportunity to combine this with the wider trend for sour and bitter cocktails by developing a canned RTD 0% Christmas negroni, for example, focusing on seasonal pine and spice profiles?
- **Spice³:** the chai spice flavour is being used across hot and cold, soft and alcoholic drinkables, as well as seeing widespread use across bakery. How could this flavour profile be made more accessible? Syrups require a cumbersome bottle with risk of leakage, but a chai-spice sugar cube could be added to any drink for on-the-go sweet spice flavour.
- **TS 3:** stout beers are enjoying a popularity surge, particularly among 18-30 year-olds, fuelled by social media. As chocolate is a favourite flavour pairing among indie brewers, why not pair the NY hot chocolate trend with stout by creating a cocoa-tinged beer served with a 'head' of torched fluffed marshmallow for viral appeal?





YULETIDE GIFTING

Give the gift of gourmet this Christmas!

At this time of the year, food-based gifting is a big part of both retail and foodservice offerings. In order to stand out from the Christmas crowd producers are becoming ever more inventive with their products, packaging and marketing tricks.

Advent calendars generate sales a month in advance, packaged with everything from cheese to tuna fish, hampers offer an indulgent surprise for the big day itself, while, at this time of traditional excess, self-care packages help to balance the body and mind through thoughtful food and drink. Boozy gifts go up a notch as festive flavours hit ready-to-drink cocktail creations, and seasonal afternoon tea gifts bring a touch of yule magic both in and out of home. Finally, interactivity is a recurring theme as blingy biscuit packaging and build-your-own kits encourage hands-on holiday fun.



YULETIDE GIFTING

ADVENT CALENDARS

HAMPERS

SELF-CARE CRIMBO

BLINGY BICCIES

BOOZY

AFTERNOON TEA

BUILD-YOUR-OWN



TFP TREND ALIGNMENT: Adapt to Thrive || Simply Delicious
|| Empowered Self

KEY REGIONS:



ADVENT CALENDARS

On the first day of Christmas my true love gave to me...

We're all aware of the good old chocolate-filled advent calendar delivering a daily sweet treat in the countdown to Christmas... but how about a cheese calendar? Or a jam advent? A tuna fish selection?

Anything goes in the advent game, from coffee and crisps to cocktails and caviar (if you have £395 to spare, Caviar House have you covered), this year brands have doubled-down on the calendar front with truly innovative – often tongue-in-cheek – offerings. Of course, chocolate remains the big focus (literally, in the case of XXL and bespoke truffle offerings) but the overriding message here is that anything can be – and *is* being – turned into advent calendar format. San Francisco's *Double Rainbow* even do a freezer-friendly calendar offering 12 days of seasonal ice cream!



Clockwise from top left: Fresh cheese advent calendar – delivered in 3 instalments for optimal freshness, **Paxton & Whitfield** (London, UK) || 12-day singing advent calendar containing a range of tuna-based snacks and tree decorations, **Bumble Bee** (US) || Spice advent calendar containing spices by Paris' **Le Comptoir Colonial**, **Williams Sonoma** (US) || Limited edition 70th anniversary Whopper advent calendar (\$19.54) containing themed gifts including a snow globe, playing cards and a digital camera with a retail value of over \$100, **Burger King** (US)



HAMPERS

A holiday hamper is the perfect way to pamper!

When it comes to Christmas gifting, nothing blends tradition and indulgence quite like the festive hamper. From simple snack selections to the iconic Fortnum & Mason luxury offering, there is a size and style of hamper to suit every budget. Tea and coffee drinkers are spoilt for choice with multiple beverage-based options, from single origin coffee pod packages to hampers containing baubles filled with premium tea, while biscuit and bake hampers provide hand crafted cakes and cookies to chase down the brew. The artisanal angle is a key selling point: hand-crafted goods made with precision and care. The Dorchester takes this to the extreme with a £750 money-no-object affair, while others offer exclusivity in different forms, such as a downloadable playlist of background music to accompany your hamper treats!

Clockwise from top left: Hamper containing 12 year old single malt, smoked salmon & a QR code that can be scanned to play soothing Scottish coastal sounds, **Old Pulteney x Forman & Field** (UK) || Michelin-starred chef Paul Ainsworth's restaurant Christmas hamper, available to order in limited numbers, **No. 6** (Padstow, UK) || Ice cream hamper including hand-made biscuits, sticky toffee pudding, wafers, mince pies and a choice of 4 ice cream tubs & 4 sauces, **Ruby Violet** (UK) || Loose leaf tea hamper with two 'baubles' containing oolong rose tea & oat cookies, and a gold strainer, **Enchantea** (Jakarta, Indonesia)

SELF-CARE CRIMBO

Wellbeing products bring seasonal serenity.

With all the excesses that can come with Christmas – rich food, alcohol, over-stimulation – a market is emerging for a less overtly indulgent approach to the festivities; one that's centred around self-care and wellbeing.

Healthier takes on the Christmas selection box swap out sugar and fat-rich confectionery for naturally sweetened, high fibre treats that promise full-on flavour with the added benefit of a healthy gut microbiome, while micronutrition comes via botanical juice blends for a daily dose of antioxidants. Come the end of the day, gift sets containing functional botanicals and adaptogens offer relaxation in drinkable form (such as Twinings' 'SereniTea' selection)... or for good old-fashioned pampering, individual hampers bring a touch of indulgence to much needed 'me time'.



Clockwise from top left: Self-care hamper containing low sugar, high protein and high fibre fruit & grain snacks, **Springhill Farm** (Nationwide, AU) || Drinks hamper containing immunity-boosting juices, infusions and shots, **Jinger Drinks** (UK) || Rest gift set containing edible collagen & 'True Nightcap', a nighttime drink containing magnesium and adaptogens to aid sleep, **Ancient + Brave** (UK) || Solo movie night Christmas hamper – hot chocolate melt spoon, Christmas pudding popcorn, XL mug and face mask, **EZ Hampers** (Altrincham, UK)



BLINGY BICCIES

This Christmas the packaging becomes the star of the show.

The traditional biscuit tin receives an interactive makeover as retailers compete to create the ultimate in musical, light and motion masterpieces.

Marks & Spencer alone has released no less than three musical, light up and projector tins this season with Aldi, Lidl, Selfridges and John Lewis following suit in the UK. Starting at as little as £10 (M&S' projector tin), these interactive gifting tins are proving wildly popular with many stores selling out in the weeks leading up to Christmas. Shortbread and cookies are by far the most popular fillings, ranging from plain all-butter bites to gently spiced Christmas pudding flavour biscuits, all designed to put a smile on the face as well as in the belly!

Clockwise from top left: Revolving musical Christmas tree biscuit tin filled with chocolate biscuits, **Royal Museums Greenwich** (London, UK) || Nutcracker novelty light-up musical biscuit tin containing chocolate chip cookies, **Aldi** (UK) || Clockwork musical biscuit tin containing Christmas pudding flavour cookies that plays *We Wish You A Merry Christmas* when the lid is rotated, **Cartwright & Butler** (UK) || 'Christmas Is Coming' chocolate chip shortbread tin that projects a rotating light show into the ceiling, **M&S** (UK)

BOOZY

Grown up gifts for the cocktail connoisseur.

Cocktail crackers, alcoholic advents and sippable selection boxes: Christmas standards are given a boozy twist for the ultimate in drinks lovers' gifting.

More than mere drinks miniatures, these items offer a step beyond in terms of content and creativity. Cocktails are packaged in ready-to-drink format, imaginatively flavoured using Christmas-inspired ingredients (anyone for a mince pie negroni?) and wrapped to resemble festive favourites. So we find canned cosmopolitans secreted inside crackers, sommelier curated world wine selections to countdown the days 'till Christmas, beers hidden within a faux bookcase, and endless liqueur-laced chocolate treats. Oozing quality of both ingredients and presentation, these are for true aficionados of the aperitif!



Clockwise from top left: Cocktail crackers – each containing a RTD can: margarita, espresso martini, cosmopolitan, pink gin fizz, negroni, old fashioned, **Moth** (UK) || “The world’s first curated wine advent calendar” containing 24 x 100 ml glass tubes filled with European and US wines selected by sommeliers, **Vinebox** (US) || Christmas cocktail selection box – gingerbread espresso martini, winter spiced negroni, mince pie old fashioned, amaretto sour – packaged with garnishes and serve cards, **Kocktail** (UK) || Boozy chocolate gift box containing 5 alcohol-infused handcrafted chocolate bars, **Compertes** (LA, US)



AFTERNOON TEA

Tea and scones with (jingle) bells on!

Whether at a grand hotel dining room or from the comfort of your own sofa, a festive afternoon tea brings a touch of Christmas class.

The afternoon tea is a year-round source of income for hotels, offering an experiential treat for the consumer and a steady flow of trade for the operator. At Christmas, things dial up a notch; hotels go all out on presentation and food theming, with elaborate display stands and festive flavours, while cafes, bakeries, even supermarkets, get in on the action. Take M&S' letterbox afternoon tea pack (£20), a post-able kit that has sold out across stores. To accommodate more consumers many hotels offer a take-home service where handcrafted pastries are beautifully packaged for pick up or delivery; a truly opulent gift for the lucky recipient.

Clockwise from top left: Festive bakery afternoon tea featuring biscuits, bakes, open sandwiches & viennoiserie, **Brød** (Cardiff, UK) || New York-themed Christmas afternoon tea including entremets inspired by classic American flavours, wagyu burger & fries, **W Hotel** (Osaka, Japan) || Festive take on a British afternoon tea served on a stand inspired by Swedish spinning angel chime with mulled wine, **Anya Café** (London, UK) || Christmas afternoon tea gift box including sandwiches, cake, pastries, scones and tea, **Rosewood HK** (Hong Kong, China)

BUILD-YOUR-OWN

Edible interactivity for hands-on festive fun.

Who doesn't love a jigsaw at Christmas? Hours of contemplative fun amid the furore of festivities. Well, what if that puzzle was *edible*?

Gingerbread house kits are nothing new but this year has seen some truly artisanal takes on the format, hand-crafted and using premium ingredients. Brands have followed suit, offering confectionery creations for the crafty consumer – such as Nestlé's KitKat cabin, a huge hit in Australia and New Zealand. If savoury's your thing, Campbell's offer a 2-pack of soup packaged with a third build-your-own soup can brick kit. For an out of home experience, chocolate lovers can create their own bespoke choc-filled Christmas decorations filled with artisanal treats... or get in on the viral candy salad craze courtesy of TikTok's own consumer store.



Clockwise from top left: Make-your-own advent calendar – guests build their calendar in-store and fill it with their choice of chocolates, **La Maison Du Chocolat** (NYC, US) || Hand-crafted bake-at-home gingerbread house kit, **Crumbs & Doilies** (London, UK) || Holiday candy salad kit allowing consumers to create their own mixes following the viral TikTok craze – only available on TikTok Shop, **Ferrara** (US) || KitKat & Co. Christmas cabin kit, **Nestlé** (New Zealand)

THOUGHT STARTERS

- **Interactive packaging:** edible gifts don't last forever, which is why producers are going all-out when it comes to Christmas packaging. Keepsake interactive biscuit tins have been a standout format this year, but what else could this approach be applied to? A Christmas themed coffee pod dispenser? A digital cocktail shaker that can display recipes?
- **Branded BYO:** build-your-own kits are becoming more sophisticated and, as brand involvement grows, so too does social media attention. Focus has mainly been around sweet treats but, given current trends for charcuterie and cheese boards, there is opportunity for savoury takes. A branded cheese tree centrepiece, for example, or a make-at-home charcute-wreath kit.
- **Anything goes advent:** the trusty advent calendar offers producers a way to package their products for seasonal alignment without need to adjust the recipe. We've seen drinks, chocolate, cheese, ice cream... what's next? Advent meal prep kits for the days leading up to Christmas? Future-forward advents featuring edible packaging?





CONSCIOUS CHRISTMAS

Low impact, low cost, fully fabulous feasting.

The rising cost of living will affect many people in many ways, not least of all when it comes to deciding what, how and where they will enjoy their Christmas meal. That doesn't mean it should get in the way of festivities, quite the contrary; resourcefulness goes into overdrive as people look to air fryer recipes and TikTok hacks for low cost, low effort inspiration. Home made treats mimic shop bought products at a snip of the cost while Christmas dinner leftovers are upcycled into delicious all-day eating snacks. Eco production and packaging brings seasonal sustainability, and as restaurants offer attractive Christmas day dining deals, many will opt for budget banqueting and eat out on the big day – or for those to whom time is most precious, at home gourmet takeaway options take the stress out of family cooking.



CONSCIOUS CHRISTMAS

TIKTOK HACKS
EASY @HOME
BUDGET BANQUETING
AIR FRYER+
BETTER HOME MADE
LOVE LEFTOVERS
ECO HOLIDAYS



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:



TIKTOK HACKS

Corner-cutting creativity from social-savvy cooks.

In recent years, TikTok has proven to be the catalyst for multiple global viral food trends, and so when it comes to Christmas hacks, the platform is awash with ways to save time, money and make delicious dishes to boot.

Larder standby ingredient play a starring role: the sort of things many people will have sitting in their refrigerator or store cupboard. Paired with labour-saving store-bought pastries and confections, the TikTok tribe produce some extremely inventive results. No-cook alternatives to Christmas pudding, takes on last year's viral Christmas crack (gingerbread is the go-to flavour for 2024!), mini trifle cups and the now famous Little Debbie Christmas tree dip are just a handful of examples that see handy hacks for everything from fixing drinks to air-frying turkey.



Clockwise from top left: Pigs-in-blankets Christmas carbonara, @veryhungrygreek (TikTok, UK) || Cranberry, bacon & Camembert wreath, @project_ivel (TikTok, UK) || Date & peanut butter bark tree made using a disposable piping bag as a mould, @mrshollingsworths (Instagram, UK) || No-cook Malteser Christmas pudding, @eatcookbake (TikTok, UK)



EASY @HOME

Ho-Ho-Home delivery for time strapped gourmands.

Restaurateurs are taking the stress out of seasonal cookery by offering heat-and-eat and cook-at-home festive food for collection and delivery.

What began as a lockdown revenue stream for many high end restaurants has become a core part of their business model. Michelin-starred eateries promise precision gourmet experiences all wrapped up and ready to unpack – for a price, of course. These options aren't about saving money but for many people they offer something just as important: time. Though it's not all high-end and high prices; casual eateries are increasingly offering this service, making it a more accessible option with menus ranging from classical French to South Indian, ultra-traditional to modern global fusion. Takeaway with a tinselly tinge!

Clockwise from top left: Dessert from the 4-course dine-at-home Christmas menu, **Restaurant 't Misverstant** (Vught, Netherlands) || Full 3-course Christmas dinner delivery service including canapés, cheese course, roast sirloin and 6 sides, to feed 6-8 people, from Michelin-starred chef Aktar Islam, **Aktar at Home** (Nationwide delivery, UK) || Vietnamese fusion take-away menu, ready to eat with collection on Christmas day, **Moon Rabbit** (Washington DC, US) || Everything but the turkey – all of the sides and sauces needed to complete a Christmas dinner, for collection to heat at home, **Medlock Canteen** (Manchester, UK)

BUDGET BANQUETING

Seasonal dining on a shoestring? Absolutely.

Consumers are spoiled for choice when it comes to out-of-home dining experiences, as more and more restaurants offer Christmas day services. As a result, competition is high which means more wallet-friendly options are on the table.

From all-you-can-eat buffets to 'everything on the menu' deals, a Christmas feast can be found for as little as £30 per person, making eating out a very real challenger to dining at home. Even 2-star eateries like London's The Clove Club are enticing diners with (relatively) affordable dining deals, and as supermarkets offer increasingly tempting festive price cuts (Lidl UK announced a dinner for 6 people for £1.87 pp), restaurant prices look set to remain competitive in reply.



Clockwise from top left: 3-course Michelin-starred Christmas lunch menu for £95 pp, designed to “experience The Clove Club without breaking the bank”, **The Clove Club** (London, UK) || ‘Everything on the menu’ Christmas sharing feast featuring 17 dishes for £45 pp, **Eat Your Greens** (Leeds, UK) || New Orleans style Christmas BBQ meat feast including smoked pork ribs, pulled lamb with rosemary & brisket burnt ends for \$99 AUD pp (£50), **Le Bon Ton** (Melbourne, AU) || Festive feasting menu of 4 small plates, a whole pheasant & a glass of spiced wine at £35 pp, **Embers** (Brighton, UK)



AIR FRYER+

The one-stop tool for tasty festive treats.

The air fryer is loved by many for its ability to cook fresh food using minimal energy (certainly when compared to a full-scale oven), and so air fry evangelists are turning to their tech to create delectable festive fare that saves both time and money.

Christmas roast veg is a natural fit for an air fryer, producing crisp roasties and caramelised carrots. But a whole turkey? Yep, even that can be cooked à l'air fryer following a few online hacks, as can sprouts, mince pies, even Christmas cake! Or how about a seasonal snack during the festive period? A Christmas dinner toastie or traybake, or perhaps a turkey and cranberry croquette? Older tech is returning to the fore, too, such as the slow-cooker which, again, is valued for its energy saving credentials.

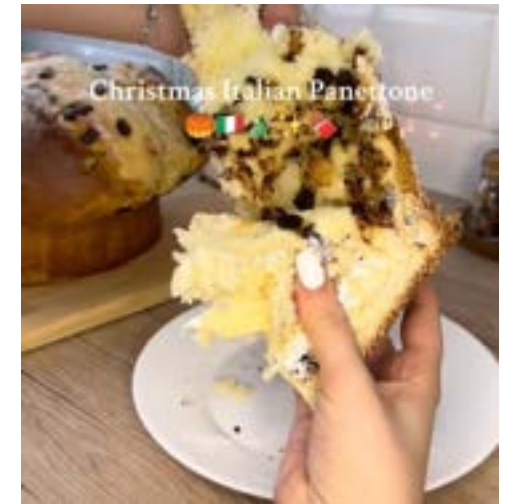
Clockwise from top left: Air fryer Christmas turkey recipe, **@thetummyfairy** (TikTok, ROI) || Recipe for slow-cooker hot chocolate, **BBC Food** (UK) || Air fryer festive traybake with gravy mayo, **Delicious** (AU) || Air fryer mince pies recipe, **Doves Farm** (UK)

BETTER HOMEMADE

Why buy when you can craft at home?

Savvy shoppers are saving their pennies by recreating their favourite festive fodder at home.

The argument is simple: not only is it cheaper to make a DIY version but it's fresher too, and so consumers with the luxury of time are buying the raw ingredients rather than the finished product and having a go themselves. Butter and booze, Christmas pud and canapé crackers, even cheese is being prepared by adventurous home cooks in a bid to achieve a balance of quality and cost. There's a middle ground too, such as the viral candy cane bows trend which sees TikTok users post recipes for table centrepieces made by baking and moulding pre-bought candies into a bow shape – or you could follow TikTok food influencer Nara Smith and make your own canes from scratch!



Clockwise from top left: Homemade advocaat recipe, **Ottolenghi** (UK) || Homemade Christmas compound butter flavoured with garlic & rosemary and set in silicone soap moulds, **@abeygaleb** (TikTok, UK) || Recipe for homemade chocolate chip panettone, **@mycookingdiary03** (TikTok, Romania) || Homemade peppermint candy cane recipe, **@naraazizasmith** (TikTok, US)



LOVE LEFTOVERS

Seasonal scraps become standalone stars.

Waste not, want not, as the saying goes – and for budget-conscious consumers (and eco-minded ones, too) Christmas is a time when leftovers can be reimagined into seasonal snacking stars.

Christmas dinner is the main focus here as leftover turkey, stuffing, sprouts and co. are rescued from lingering at the back of the fridge to become flavour filled frittata, tasty toasties, festive lasagne and more. Sweet formats, too, are upcycled to become more than the sum of their parts, from gingerbread chocolate crack to *dammsugare* (literally, ‘vacuum cleaner’) cookies that can be adapted to make use of virtually any sweet scraps. Many recipes are based around air fryer or zero-cook preparation, doubling down on the cost-cutting approach.

Clockwise from top left: Air fryer bubble & squeak using Christmas veg leftovers, **Jamie Oliver** (UK) || Dammsugare, a Swedish confection made using leftover bakery items – here made using leftover brownie & store cupboard marzipan, **CBC Life/Butter & Spice Bakeshop** (Canada) || Leftover Brussels sprouts frittata containing cranberries & Comté, **Sainsbury's Magazine** (UK) || Turkey & stuffing meatballs with cranberry sauce dip, **The New York Times** (US)

ECO HOLIDAYS

‘Tis the season of sustainability.

Producers are making it easier for consumers to make sustainable choices this Christmas with goods that focus on responsible production methods and eco-friendly packaging.

Minimising waste within the production cycle is a key method to maintaining both cost efficiency and reducing environmental impact, and is increasingly adopted by independent producers as a standard operating procedure. We see fruit and veg trimmings upcycled into ferments, preserves and sauces, and more climate hardy crops used to create pastries and doughs. Regenerative farming aims to redress the ecosystem balance while compostable and recycled packaging rails against the dominance of petro-plastics – and in the case of paper bottles, reduces shipping emissions by employing a lightweight alternative to glass.



Clockwise from top: Bavarian Medley – a glühwein made with fresh fruit & berries packaged in a bottle made using 94% recycled cardboard, **Ethnic Brand Marketing/Frugalpac** (UK) || Quince mince pies made using leftover quince (core, skin), brandy, apples & spices in a pastry made using remilled middlings, **Quince Bakery** (London, UK) || Peppermint crème truffles made using regeneratively grown ingredients and packaged in compostable wrappers, **Alter Eco** (US)

THOUGHT STARTERS

- **Air fryer Christmas:** with so many home cooks turning to the air fryer as a method to create low energy consumption Christmas meals, an opportunity emerges to offer festive air fryer specific products. For example, a Camembert with pigs-in-blankets dippers, both of which could be cooked at the same time.
- **Recycle recipes:** a very simple way to encourage waste reduction would be to suggest ways to use leftover products within recipes printed on that product's packaging. Or perhaps a QR code could be used to direct consumers to a branded website containing recipe suggestions.
- **Purposeful packaging:** consumers are more aware than ever of the negative connotations associated with plastic packaging. Indeed, an LA Times report stated that 72% of Gen Z respondents took active steps to reduce their plastic use. At a time such as Christmas when packaging fills homes, could you stand out as a producer whose packaging is compostable, reusable or even edible?





CUISINE INFLUENCES

The concept of feasting is an international love language, transcending cultures that can often be a celebration unto itself.

This year, we look to other cultures as part of the wider trend towards having Christmas our way. The United Kingdom comes together in a celebration of heritage from Scotland, Wales and a recalling of Medieval roots. The resurgence in classic French cooking influences mains, desserts and sides. The Mediterranean imports its sun with slow-cooked centrepieces, wraps and wreaths. Middle Eastern and Indian palates transpose to Christmas perfectly, both masters of spice use. Southeast Asia imparts umami into our chocolate desserts and sandwiches. Mexico brings even more warmth to a hot toddy and inspires hot takes on a cheese toastie!



CUISINE INFLUENCES

BRITISH

FRENCH

MEDITERRANEAN

MIDDLE EASTERN

INDIAN

EAST ASIAN

MEXICAN



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:





BRITISH

Not exactly famed for its sunny weather, British cuisine has built itself around a colder climate, coming into its own during Christmas in particular.

The Scottish dish 'rumbledethumps' features this Christmas: a crisp, crunchy surface of oats and breadcrumbs giving way to a comforting silt of potatoes, onions, cheese and Brussels sprouts. Welsh rarebit, a dish championed by British institution St. John, comes to our supermarket shelves with a twist – using pastrami, Emmenthal and gherkins to mimic a Reuben sandwich. Roast goose and potatoes roasted in its fat served with red cabbage and apple sauce, takes us back to a Dickensian Christmas. However, some dishes take us back even further still, to Medieval Britain with a dish called 'flampoyntes' – the predecessor to the mince pie, featuring a blend of pork mince, spices and cheese in a short pastry.

Clockwise from top left: Rumbledethumps made with Brussels sprouts, onions, cheese & potatoes, topped with oats & panko, @rovinghaggis (TikTok, UK) || Pigs-in-blankets Scotch eggs, @haydenkgroves (Instagram, UK) || Flampoyntes made using pork, ginger, cinnamon, mace, cloves and cheese, @eathistory (Instagram, US) || Roast goose, goose fat potatoes, braised red cabbage & apple sauce, Noble Rot (London, UK)

FRENCH

Famed for the liberal use of butter, among many other things, French cuisine is an ideal source of inspiration when you want to create indulgent dishes at Christmas.

Requiring just a handful of ingredients and a bit of know-how, a tarte tatin makes the most of the Maillard reaction. Using slices of parsnip glazed in maple syrup humming with ginger, a scattering of cumin seeds adds extra notes of warming spice. A rippling blanket of *aligot* skirts the line between solid and liquid, this time using the funk of Camembert and ooze of mozzarella, with plenty of butter and cream. The classic madeleine returns flavoured with strawberry, chocolate, pistachio, and vanilla to be arranged as a Christmas tree, like a Christmassy croquembouche! Meanwhile, kouign-amann's are stuffed with fruit mince and finished with icing sugar snow.



Clockwise from top left: Parsnip tarte tatin made with maple syrup, ginger & cumin, **The Guardian** (UK) || Camembert aligot, **@poppy_cooks** (Instagram, UK) || Mince pie kouign-amann, **Koselig Bakeri** (Edinburgh, UK) || Madeleine Christmas tree, **Moderne Bakery x @nicdreamofpastry** (Instagram, US)





MEDITERRANEAN

Although synonymous with longer lifespans, the Mediterranean diet isn't precluded from indulgence, providing a delicious base of inspiration this Christmas.

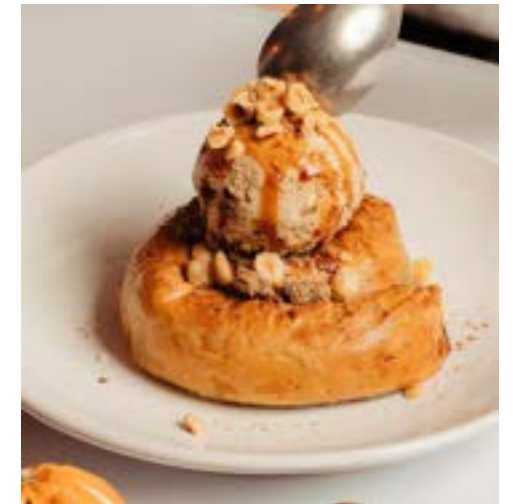
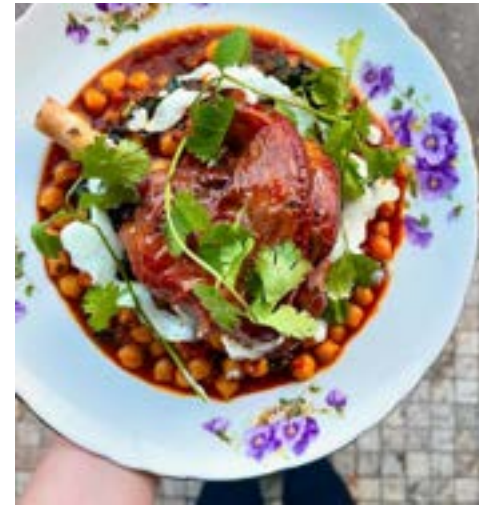
A whole lamb shoulder requires little preparation without sacrificing the sense of occasion; slow roasted with mounds of oregano, plenty of fresh lemon, heaps of garlic and lashings of olive oil, served on a verdant green salsa. The iconic gyros become the perfect vehicle for a Christmas twist, with shredded and braised turkey, pig in blanket, a dollop of cranberry sauce and, of course, chips on a pillowy flatbread. Tomato, pesto and feta pack a puff pastry wreath with festive colours, doused with olive oil and speckled with sesame snowflakes. Light and silky swirls of frozen Greek yoghurt balance an infusion of baklava – the sweetly spiced, buttery notes pair beautifully, with chunks adding texture.

Clockwise from top left: Greek lamb shoulder with green salsa, **@creamy_confusion** (TikTok, AU) || Mediterranean-style puff pastry Christmas wreath filled with feta, tomatoes, pesto, sesame seeds & olive oil, **@toniabuxton** (Instagram, UK) || Festive gyros with shredded turkey in chicken gravy, pig-in-blanket, chips & cranberry sauce, **@food_host** (Instagram, India) || A festive take on retro Viennetta – cassata semifreddo containing marzipan, chocolate & clementine zest, **Georgina Hayden/The Guardian** (UK)

MIDDLE EASTERN

With many of the spices so evocative of Christmas deriving from the Middle East, it's easy to see how this part of the world goes on to inspire dishes during the festive season.

Lamb shanks simmered into submission with loads of white wine until falling off the bone sitting on a pool of red pepper sauce, undulating with fat, tender chickpeas, finished with splats of mint yoghurt and coriander. Classic hand pies filled with chicken tagine and aromatic rubble of dukkah are uplit with preserved lemon and green olives. A batch of simple brioche buns are generously slathered with cream cheese frosting and finished with the vibrant pop of pomegranate and the cool rush of fresh mint. Burnish spirals of börek are the ideal format for a riff on a mince pie, topped with tahini and Medjool date ice cream and a scree of toasted hazelnuts for a slick new take on the old.



Clockwise from top left: Braised lamb shank, white wine & roasted pepper chickpeas, mint yoghurt & coriander, **The Wood Owl** (Toronto, Canada) || Chicken tagine hand pie with dukkah, preserved lemon & green olives, **Mother Dough Bakery** (Singapore) || Mince pie börek with tahini & Medjool date ice cream, finished with toasted hazelnuts, **Leydi** (London, UK) || Christmas day Middle East spread, including Medjool dates with goat's cheese & pistachio, turkey with mint & cumin, and hawajj dill crusted salmon, **@ottolenghi** (Instagram, UK)



INDIAN

Built on its mastery of spice, Indian cuisine can bring rib-sticking comfort and satisfaction but always with bright, bold flavours, making it hugely to Christmas twists.

Buttery, flaky parathas become ideal candidates for the mince pie treatment, with loads of fruit mince thrown into the dough and cooked until golden. Samosas get a Santa-fied twist to form a tree of plaits, all bursting with classic samosa fillings of potato and peas. A mutton *wallah* pie boasts generous chunks of turkey beneath a butter pastry lid, bringing extra layers of warmth. Elsewhere, the ubiquitous charred chunks of hispi cabbage get a new lease of life, slow-roasted in nutty brown butter, swimming in a South Indian *gassi* sauce, cosy with toasted spices. A spice crumble and a coriander slaw, keep things texturally interesting whilst giving the dish fresh, too.

Clockwise from top left: Mince pie paratha, **Bundobust** (UK) || Cabbage slow-roasted in brown butter & coconut curry, South Indian gassi, topped with spice crumble & fresh coriander slaw, **Passerine** (NYC, US) || Samosa Christmas tree with green chilli chutney, **@whenmeateatsveg** (Instagram, UK) || Mutton wallah turkey pie, **Rickshaw & Co.** (Glasgow, UK)

EAST ASIAN

With an emphasis on umami, fermented funk and spice, East Asian cuisine is a perennial influence on food and drink, with Christmas being no exception.

The continued drive of classic French cookery intersects with Japan, informing dishes from fine dining to street level. Confit duck meets umeboshi (plums preserved in salt) in the form of a rillet, all served alongside a crisp rice cracker. Desserts make use of miso, matcha, hallabong and more, blending them with more traditional milk chocolate and peppermint to become true festive fusions. Even Christmas sarnies get the East Asian touch (M&S' festive range includes a Korean fried chicken sando with gochujang and cranberry) as influences from Japan, Korea, Thailand, Vietnam and beyond make their way onto Yuletide menus.



Clockwise from top left: Duck leg rillettes cured and slow cooked in its rendered fat, seasoned with preserved plums dehydrated as prunes & as umeboshi in a wet brine, radicchio & rice cracker, **Cardinal** (Edinburgh, UK) || Milk chocolate, peppermint, miso caramelised coco pops & matcha, **King Clarence** (Sydney, AU) || Korean fried chicken with sriracha mayonnaise as part of a Christmas platter, **The Botanist** (UK) || 'Turkey Christmassaman' - turkey, roasted spuds & carrots, in a creamy coconut curry spiced with galangal, cardamom, ginger, and lemongrass, **Leon** (UK)



MEXICAN

Full of colour, warmth and big flavour, Mexican cuisine is a source of sunny-soaked inspiration this Christmas. From food to drinks, it's adept to bringing new life to any celebration.

Toasted burritos come laden with grilled chicken among paprika-heavy grains of rice, crushed nachos and stuffing, all bound by cranberry and chilli sauce and an ooze of three cheeses! Meanwhile, the beloved cheese and jam toastie gets a revamp with a quesadilla blanketed to the brim with melted Camembert and cranberry sauce. When it comes to our favourite tipples, the hot toddy gets a remix with tequila, agave, lime and cinnamon. Elsewhere, the Mexi-Spanish carajillo uses espresso, Licor 43, Nixta, and Santa Teresa rum for a cosy mix of corn notes and butter sugars, offset with some bittersweet coffee.

Clockwise from top left: Santa's carajillo, **Brix** (Missouri, US) || Christmas burrito with grilled chicken, rice, crushed nachos, 3-cheese sauce, cranberry chilli sauce & stuffing, **Taco Bell** (US) || Camembert & cranberry quesadilla, **Tortilla** (UK) || Mexican hot toddy with Tapatio Reposado, agave lime & cinnamon, **Mamnick** (Sheffield, UK)

THOUGHT STARTERS

- **A naan issue:** convenience and fun twists play a decisive role this year, so why not riff on a keema naan stuffed with curried turkey, sage pakoras and a chilli cranberry sauce, brushed with tarka?
- **Stuffing revisited:** with its blending of beef, fruit, nuts and spices, koofteh tabrizi is already evocative of Christmas. With the addition of breadcrumbs, why not use it as a stuffing inside a porchetta or a traditional turkey?
- **Thai'd up:** as East Asia trends for alternative influence whilst also looking to other cultures' palates for similar ingredients, think about Vietnamese dishes like pho for a fun twist. The ethereal anise flavour of holy basil, ginger and chilli can evoke Christmas in new ways; in turkey broths, summer rolls packed with sprouts, winter citrus and shredded glazed ham.





FLAVOURS

Some flavours are so inextricably linked to the festive period that they can evoke it during the remaining months.

A common thread this year is that we see these established flavours in new forms, with some new ones thrown in. Peppermint, especially in terms of candy cane trends, in all but their physical form, inspires confectionery, pastry and desserts. Likewise, eggnog and Baileys are used less as a drink than for flavour and texture, transposing a festive lilt on dishes from fine dining to snacks. In the same way, chestnuts come out of their shell to give a festive flavour to French toast whilst propping up the resurgence of classical French flavours with a trend for Mont Blanc. In contrast, tropical flavours represent an inversion of this, bringing sun to traditional Christmas dishes, whilst winter citrus imparts a more localised warmth. Pistachios bring pizzazz to panettone and pâtissière. The Black Forest flavour profile inspires cakes and coffee while swavoury flavours splice the traditional with the unconventional.



FLAVOURS

PEPPERMINT

EGGNOG

TROPICAL

PISTACHIO

CHESTNUT

SAVOURY & SWICY

WINTER CITRUS

BLACK FOREST

BAILEYS



TFP TREND ALIGNMENT: Adapt To Thrive || Simply Delicious
|| Savvy Living

KEY REGIONS:



PEPPERMINT

With their Santa-like colour scheme to a taste evocative of cold weather, candy canes symbolise Christmas. However, this year, they exist in anything but their traditional form, inspiring a range of sweet treats.

Smart, slender boxes of red and white peppermint flavour macarons are stunning in their simplicity, creating a joyful but sophisticated gift. Whilst pink and white layers of peppermint ice cream, bejewelled with crushed candy cane, keep things fun. Eminently customisable, doughnuts can be ideal vehicles for a wide range of flavour combinations and festive aesthetics. Billowy dough bursts with mint buttercream covered in vanilla ice cream and cookie pieces. Sweet treats usually sporting milk or even dark chocolate, switch it up to peppermint candy cane-flavoured white chocolate. Think red and white pavlova – why not?



Clockwise from top left: Vanilla Thin Mints Dream: Vanilla icing with Girl Scout Thin Mints cookie crumbles & mint buttercream, **Duck Donuts** (US & Canada) || Peppermint flavoured macarons, **Three Loaves Bakehouse** (Queensland, AU) || Peppermint Sliced Creation, **The Original Rainbow Cone** (Chicago, US) || Candy cane-flavoured KitKat with white chocolate, **KitKat** (UK)



EGGNOG

Christmas custard eggnog, with its nutmeg and the addition of cinnamon for some, isn't just a boozy, full-bodied drink. This Christmas, eggnog is right at the yolk of adventurous inventions.

High-end gastronomy plays with texture, producing an eggnog foam, spooned over plums grilled with thyme and served with hay ice cream. Eggnog-sodden brioche makes French toast inspired by the flavour of cinnamon rolls, piped with cinnamon sugar, before being fried in clarified butter. Adorned with roasted pistachio ice cream and white chocolate raspberry cream, it's then enrobed with brandy-boosted eggnog custard. Eggnog Bourbon slushies transform it into a fun but elegant cocktail. Elsewhere, eggnog walnuts offer a festive snack in a resealable bag, making it easier for when you're on the go.



*Clockwise from top left: Eggnog-covered walnuts, **Crazy Go Nuts** (US) || Eggnog Bourbon slushie, **The Alna Store** (Maine, US) || Grilled plum with thyme, eggnog foam & hay ice cream, **Barr** (Copenhagen, Denmark) || Eggnog cinnamon roll French toast with brioche filled with brown sugar cinnamon filling, fried in clarified butter & topped with roasted pistachio ice cream, white chocolate raspberry cream & brandy eggnog custard, **Surrey Hills Grocer** (Singapore)*

TROPICAL

Another example of the shift away from traditional dishes is the use of tropical flavours, bringing some winter sun into our food and drink at Christmas.

Layers of coconut dacquoise and ice cream with lime mousse vivid raspberry sorbet create a phenomenal Bûche de Noël, finished with a luminous mango gel, pistachios and white chocolate. Whereas a toasted meringue Christmas roulade uses a coconut sponge and mousse, paired with passionfruit curd and fresh mango chunks. With ginger also being a common ingredient in tropical cooking, we see lattes with coconut milk, topped with whipped cream and gingerbread pieces. For something a little stronger, a cocktail using toasted rice blends mango, coconut milk, espresso, salt and cherry rum for a robust yet elegant, Christmas cocktail.



Clockwise from top left: Tropical Bûche de Noël with coconut dacquoise base, coconut ice cream, raspberry sorbet, lime mousse, dusted with shredded coconut, mango gel, pistachios & white chocolate, **Madame & Yves** (Sydney, AU) || 'Up & Away' with One-Eyed Rebel Black Cherry Rum, toasted rice, mango coconut milk, espresso & salt, **Three Little Words** (Manchester, UK) || Coconut gingerbread latte with gingerbread spice, coconut milk, whipped cream & crushed gingerbread, **The Providore** (Singapore) || Meringue Christmas roulade with coconut sponge, coconut mousse, passionfruit curd & fresh mango pieces, finished with white chocolate shards & snowflakes, **Black Star Pastry** (Sydney, AU)



PISTACHIO

A time for a little added luxury, pistachio is being used significantly this year, in addition to being a trending flavour in general.

Panettones come strewn with pistachio praline, suspended among pockets of white chocolate and raspberries in a glowing, enriched crumb. Cruffins stow payloads of white chocolate and raspberry custard, sealed in by pistachio ganache. Again, detail and precision feature in the pastry section at Christmas, with sharp cross sections revealing strict layers of pistachio praline and crème pâtissière, raspberry jam, finished with pistachio ganache montée and edible golden baubles. Meanwhile, a hyper-realistic red and white 'pom pom' is a dessert featuring layers of pistachio cake and pistachio mascarpone mousse, contrasted with strawberry, pineapple and redcurrants in a pistachio sponge!

Clockwise from top left: Panettone with pistachio praline, white chocolate & raspberry, **Gorilla Bäckerei** (Berlin, Germany) || White chocolate & raspberry custard filled cruffin with pistachio ganache, **Queens Fine Pastry** (Tasmania, AU) || Christmas Santa Pom pistachio cake with layers of pistachio mascarpone mousse, strawberry & pineapple compote, red currant pistachio sponge, topped with crispy pistachios, **Janice Wong Pure Imagination** (Singapore) || 'Evergreen Tart' filled with raspberry jam & pistachio crème pâtissière, pistachio praline & piped with mascarpone cream, finished with pistachio ganache montée & edible golden baubles, **Banksia Bakehouse** (Sydney, AU)

CHESTNUT

Ideal when roasted on an open fire to keep Jack Frost at bay or in our crème pâtissière, chestnut is yet another classic Christmas flavour spanning sweet and savoury.

Bûche de Noël, coated in tempered chocolate, crack open to reveal Mont Blanc mousse and a shock of cherry compote, whereas a Mont Blanc-inspired budino filled with chestnut cream is topped with that iconic squiggle and a piece of chocolate sponge. Yule logs feature bold, surreal takes on the natural form, encased in festive rouge chocolate that contains chocolate sponge, redcurrant compote and feuilletine. All this helps accentuate a Chantilly using chestnuts sourced from Japan's Shimanto river basin Japan. French toast makes a return too, with a swavoury twist, filled with chestnut paste, scattered with pecans and served with chicken bacon, thyme and star anise.



Clockwise from top left: Mont Blanc inspired Bûche de Noël with cherry compote and chocolate coating, @maddiebrehm (Instagram, US) || Mont Blanc budino, chestnut cream with chocolate sponge, **Landrace Bakery** (Bath, UK) || Chestnut Yule log with chocolate sponge layered with redcurrant compote, feuilletine & premium Japanese chestnut Chantilly made with chestnuts harvested from the Shimanto river basin of the Kochi prefecture of Japan, **Janice Wong Pure Imagination** (Singapore) || Chestnut French toast with French chestnut paste, pecan nuts & chicken bacon, thyme, & star anise, **Keong Saik Bakery** (Singapore)



SWAVOURY & SWICY

Of course, many Christmas dishes hinge on their marriage of sweet and savoury. Now, as consumers branch out from traditional dishes, sweet and spicy is appears to be the next step.

Slightly sweet doughnuts wreathed in vermicelli and deep-fried resemble urchins, absolutely packed with spicy venison. A pork collar, its intramuscularity imbued with a spice rub, is served with a velvety mound of mash and a reduction of forest berries. Meanwhile, a substantial salad takes inspiration from Provence with green mesclun along with radicchio, plump blackberries and almond caramel with trout gravlax and sour cream. With a wedge of melted brie for good measure, of course. Hot honey, one of the most long-standing trends in recent times, finds a place on the shelf this year with spiced cranberry.

Clockwise from top left: Spicy venison & vermicelli doughnut, **Gunpowder** (London, UK) || Spice rubbed Spanish pork collar, mashed potato & forest berry reduction, **Acoustics Coffee Bar** (Singapore) || Grilled brie salad with green mesclun, radicchio, blackberries, trout gravlax, sour cream & caramel almonds, **Florida** (Victoria, Argentina) || Spiced cranberry hot honey, **Sauce Shop x Aldi** (UK)

WINTER CITRUS

For those of us with fewer tropical options to hand, the bursts of warm sweetness and ethereal zest winter citrus gives us are just as good.

The intensity of unroasted chocolate, with its earthy and fruit-like acidity, pairs perfectly with the oils of orange or lemon peel. The trend towards big, show-stopping Christmas pudding alternatives sees buttery pie bases with thick layers of orange curd spiced with cinnamon and nutmeg under a toasted meringue tundra. Desserts at the fine dining level combine a coconut espuma and eggnog with the floral acerbity of yuzu. For savoury dishes, spools of Norwegian sashimi, smoked with pepper and orange, are arranged among slices of fresh raspberries, orange and coils of its zest with young thyme. Winter citrus is a great way of evoking Christmas without being tied to traditional tropes.



Clockwise from top left: Winter citrus unroasted dark chocolate, **Raaka** (NYC, US) || Coconut espuma, eggnog & yuzu, **Paris House Restaurant by Phil Fanning** (Milton Keynes, UK) || Orange-spiced meringue pie with cinnamon & nutmeg, **@thehungryhobbit** (Instagram, UK) || Norwegian salmon sashimi smoked with pepper & orange served with raspberries, orange & young thyme, **Lidl** (Italy)



BLACK FOREST

Comprised of cream, chocolate and fruit, the simplicity of the Black Forest flavour profile makes it adaptable to drink and dessert alike.

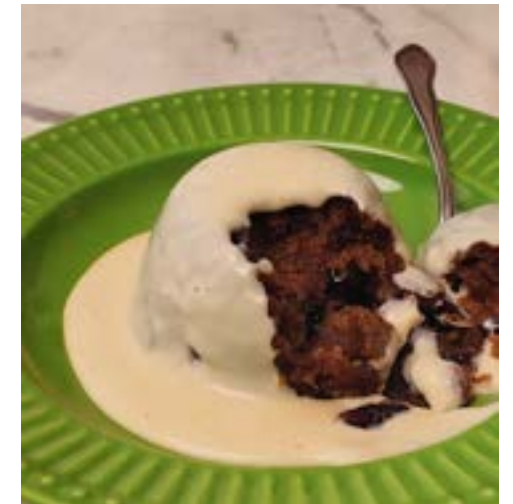
A Yule log with a bark of cocoa-dusted chocolate bark holds a spiralling of chocolate sponge, white chocolate ganache and cherry confit, finished with chocolate shards, whipped cream and glace cherries. Meanwhile, a mirror-glazed cake reveals a core of chocolate devil's food cake and Morello cherry compote, capped with Chantilly cream, surrounded by dark chocolate mousse on a dark chocolate crumble base. Whipped white and dark chocolate ganache, glacé Morello cherries and gold leaf top it all off! The world of coffee draws inspiration here too, with cherry cream foamed lattes finished with chocolate shavings and a glacé cherry. Others opt for chocolate sauce and cherry syrup between layers of espresso, cherry milk and whipped cream!

Clockwise from top left: Black Forest log cake with chocolate sponge, white chocolate ganache, cherry confit, chocolate shards, whipped cream & candied cherries, **Laurent Bernard Chocolatier** (Singapore) || Black Forest cream latte topped with chocolate shaving, cherry foam & glacé cherry, **Rise Bakehouse** (Singapore) || Black Forest Gateaux Latte with fresh espresso, dark chocolate & cherry, **Dunkin' Donuts** (UK) || Black Forest Noël table centrepiece with devils food chocolate cake, Morello cherry compote, fresh vanilla Chantilly, dark chocolate mousse, chocolate mirror glaze & dark chocolate crumble base, decorated with whipped white chocolate ganache, dark chocolate ganache, dark chocolate shards, Morello cherries, and gold dust & leaf, **Pettigrew Bakeries** (Cardiff, UK)

BAILEYS

Almost certain to be a part of the Christmas drinks trolley this year, Baileys is another item that, whilst available year-round, comes into its own at Christmas.

As the cost of living continues, energy-efficient modes of preparation are key – especially when feeding a crowd. Big batches of hot chocolate made with chocolate truffles can be made in the slow cooker rather than the stove, meaning guests can just help themselves, finished with mini marshmallows and whipped cream. Quick and delicious desserts save us time and energy on the big day, such as a Baileys Christmas cake that needs only four ingredients, using no egg or butter! Custards made with a good glug of Baileys can be poured over steaming Christmas puddings for a little festive fun. For the chocolate lovers out there, peanuts and cashews come coated in Baileys-infused milk chocolate.



Clockwise from top left: Slow cooker hot chocolate made with Baileys & Lindt chocolate truffles, finished with whipped cream, marshmallows & milk chocolate shavings, **@boredoflunch** (TikTok, UK) || 4-ingredient Christmas cakes using Baileys, mixed fruit, condensed milk & flour with no butter or eggs, **Mattaroons** (Somerset, UK) || Christmas pudding with Baileys custard, **@skinnymixer** (Instagram, AU) || Peanuts & cashews covered in milk chocolate with a hint of Baileys, **Tesco** (UK)

THOUGHT STARTERS

- **Peppermint to be:** because many dishes are so rich and hefty, a refreshing peppermint and lemon thyme sorbet would make an ideal palate cleanser.
- **Eggnog redux:** with a little condensed milk, you can make your own no-churn eggnog ice cream, finished however you like. A roasted spiced plum ripple. Fresh mint and chocolate chip. Or simply crush up a mince pie or gingerbread cookie and mix it through!
- **Swavoury 2.0:** for a next-level leftover sandwich, reverse-toast slices of pandoro or panettone, add slices of glazed ham or bacon and top with peanut butter and chilli. Or shredded cheese, braised spiced red cabbage and candied nuts!



SUMMARY

Although touches of luxury, environmental concerns, convenience and doing things our way shape the trends this year, it's also viewed through a lens of time versus money for many.

The uncertainty for restaurants post-COVID may not yet quite be over, but for those of us who don't want the hassle or the washing up, they continue to go above and beyond feeding us this Christmas. The inverse of this sees consumers spending comparable amounts on premium ingredients to cook at home, creating a sense of traditional togetherness. Moreover, it's the pervading shift away from tradition broadly that colours consumer habits this year, coupled with the pre-existing trend of Gen Z redefining mealtimes, meaning we're increasingly celebrating Christmas on our terms. This is something bolstered by social media, an ever-flowing source of inspiration that thrives on cross-fertilising ideas. Conversely, as brands use experiential marketing, they seek to tap into our sense of tradition and nostalgia, causing us to feel the experience as a collective, in deference to the brand itself – consciously or not. This notion of nostalgia is also evident in classic flavours reworked, making this break from tradition innately tied to key flavours, which can also be found in cuisines around the world. It's plausible that next year, it'll be the very same – but different.

