

Money Matters: Natural Food Choices in the New Financial Reality

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What We Do ...
We are a Fractional Foresight & Trends Intelligence Team
Others track the past. We track what's next.
Methodology
Military Intelligence & Chaos Analytics

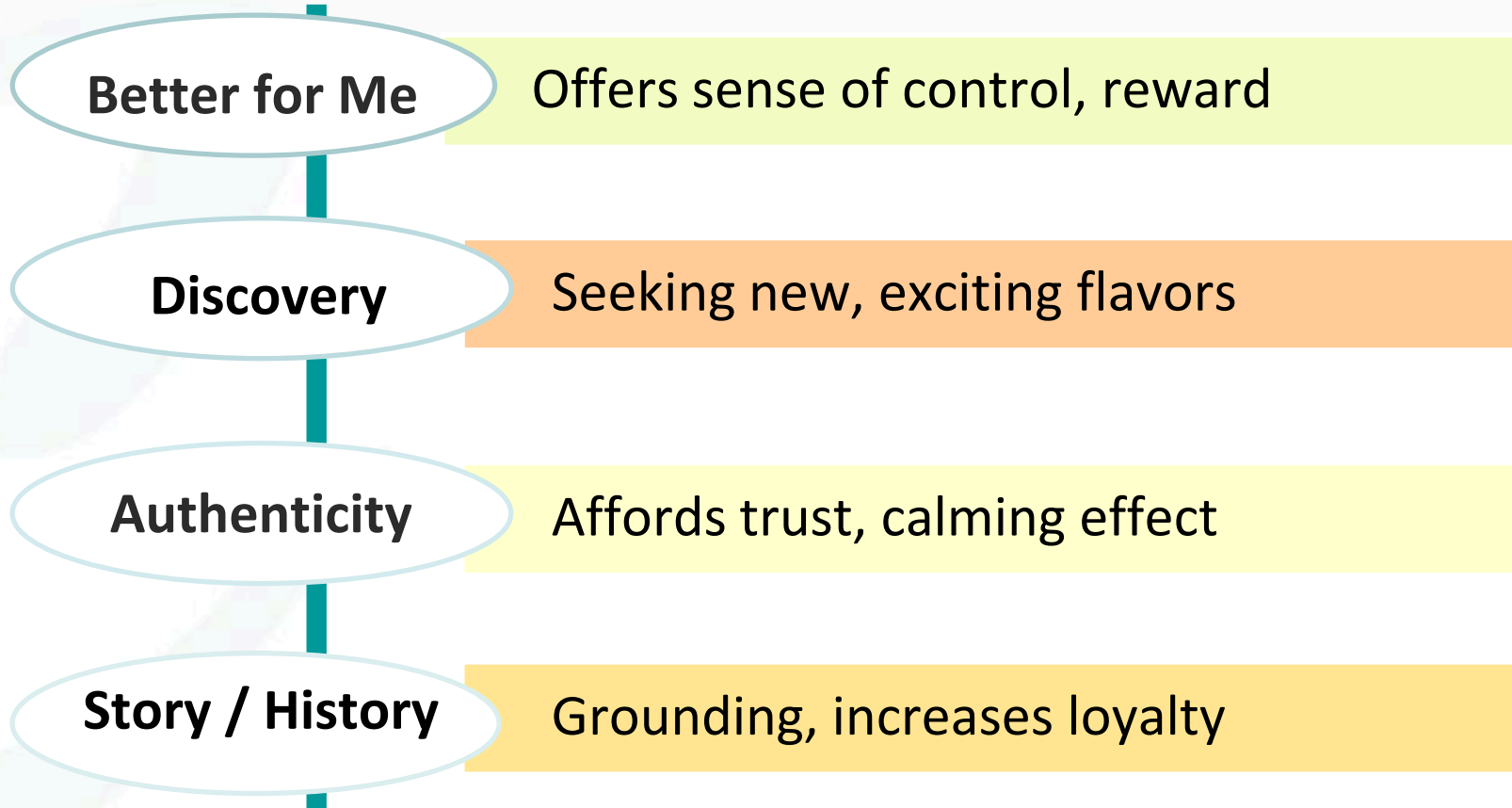


**Stop Playing Catch-Up:
Understand the 'Why'
Behind Consumer Choices**





Consumers Drivers

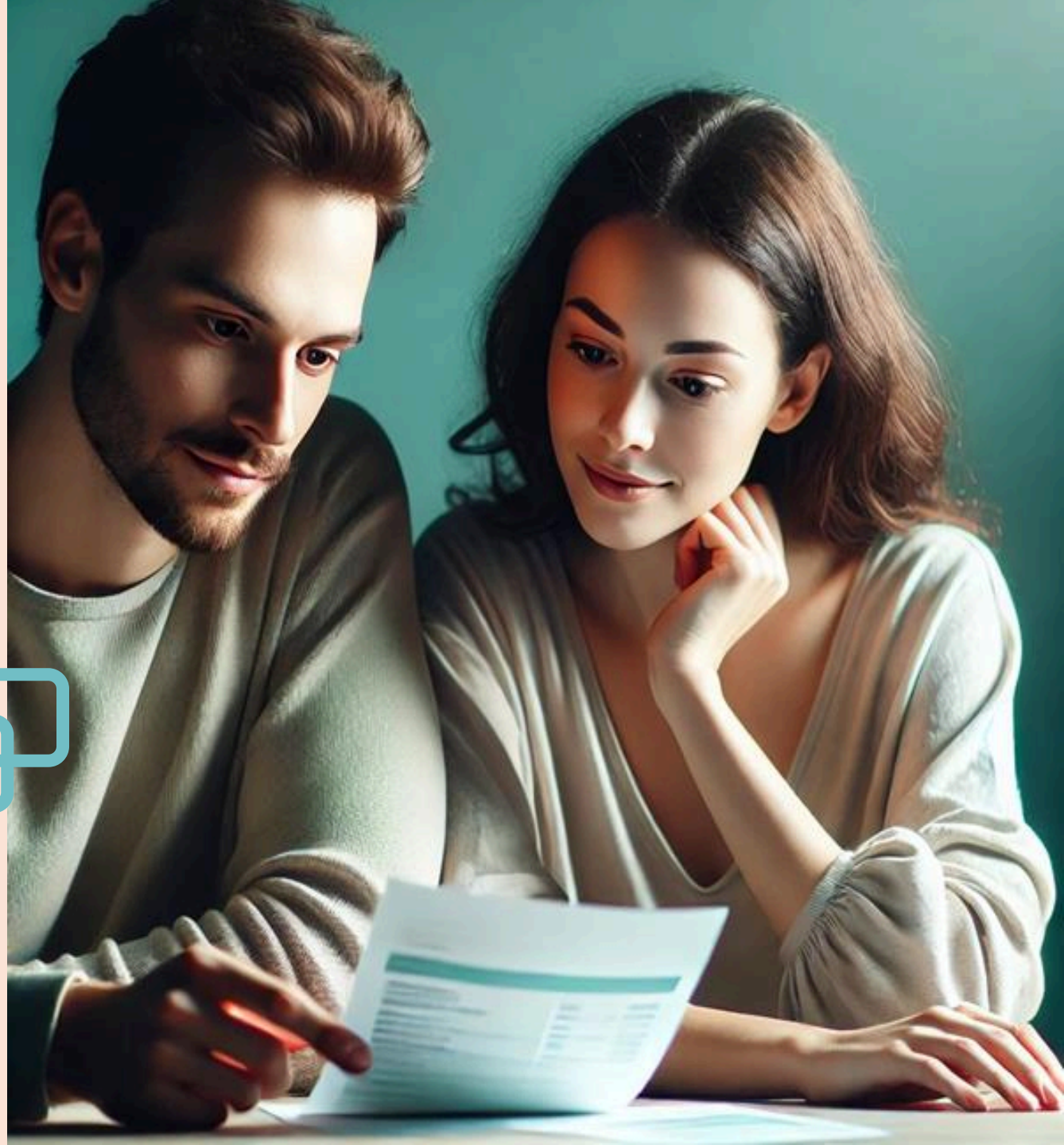




More Drivers... Motivational



The New Value Equation



Value ≠ Cheap

In 2026, value means intelligent spending — not minimal spending.



- ✓ Worth it
- ✓ Shareable
- ✓ Functional
- ✓ Flavor-forward
- ✓ Flexible

ELI: Shared orders growing 8%.

Lumina Intelligence: 81% use functional products, 51% prioritize stress; 48% anxiety.

Keurig Dr Pepper: 66% seek functional beverages supporting physical health.

Rubix Foods: 66% likely to buy spicy items, 44% willing to pay more for spicy items.



The Rise of Value-Flex

Consumers are reallocating, not retreating.
This pattern matters more than the price.

Consumers:

- Stretch
- Swap
- Delay
- Downsize
- Splurge selectively



Circana: 34% drink fewer energy drinks due to caffeinated water, 29% substitute functional water

Tastewise: Hard kombucha -29.8%, Cannabis beverages -53.8%, Plant milk -40.99%

Kantar: Basa sales up 50%, Mackerel/yellowfin tuna +15%

OpenTable: 61% view dining as a special occasion



Emotional Math Drives Food Choices

This is emotional budgeting.

Not: “We can’t afford anything.”

But: “We will choose carefully.”



Internal dialogue:

- “I’ll skip the drink.”
- “We don’t need dessert.”
- “Let’s share.”
- “I deserve one treat.”



Keurig Dr Pepper: Over 60% prefer non-alcoholic options.



Tastewise: Sharp declines in certain trend categories (freeze-dried candy -51%).



ELI: Shared orders growing 8%.



OpenTable: 55% plan to spend more dining out.

Develop Foods that Support Long-Term Health

Drivers (Why)

- Consumers focus on holistic health, not just weight loss.



Health (How)

- Shoppers are thinking beyond today's meal. They're choosing convenient foods that support energy, heart health, and mental clarity over time.
- Fresh, thoughtfully prepared options signal "better-for-me" without extra effort are becoming everyday choices.



Translation to Food/Bev (What)

- **Focus:** foods featuring heart-healthy fats, fiber-rich plants, lean proteins, whole grains and legumes, and functional ingredients.

Sustainability: Empowering Consumers / B2B Clients

Sustainable Brands, Ipsos:

- 70% believe they can influence companies to do better by buying from them
- 85% are loyal to brands that help them achieve a better & more balanced life
- 77% agree solving environmental issues will require solving social issues

Out

- Generic “green” label statements
- Marketing how a sustainability practice helps your company
- Promoting how your company’s sustainability efforts helps the environment / community



IN

- Explain **why** product has green claim on label – educate the consumer
- Marketing **how** a sustainability practice helps the consumer
- **Empower** consumers – give them the control over bettering their environment / community by using your products

- You are not the HERO in consumers / clients’ lives... You are the GUIDE
- Consumers / clients are the HERO in their own lives... you guide them to become the HERO by buying your products

Financial Swaps in Real Life





Cohort Differences in Value Behavior

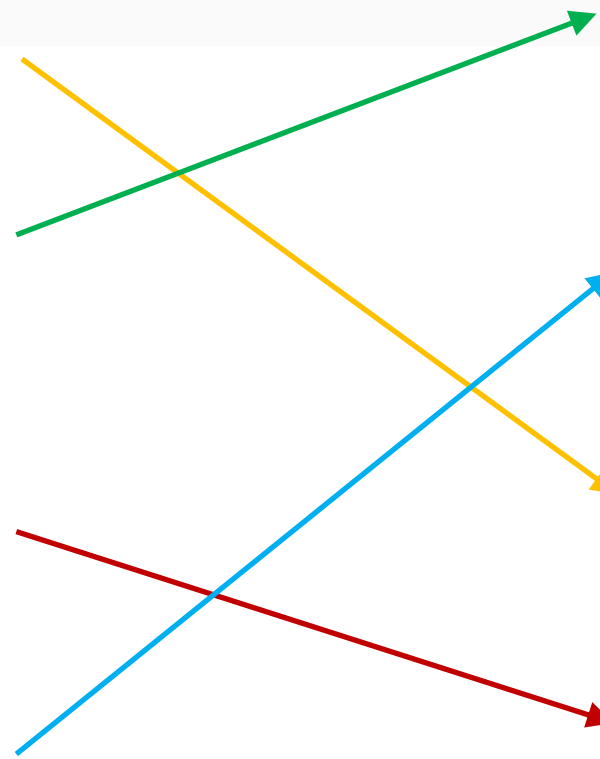
Behavior shifts by life stage.

Generation

- Gen Z
- Millennials
- Gen X
- Boomers

Driver

- Function justifies spend.
- Familiar quality matters.
- Experience > quantity.
- Family-first trade-offs.



What Gets Cut First

Add-ons are the first to go unless justified.

Beverages



Appetizers



**Under pressure,
consumers eliminate:**

Desserts



Premium Add-ons





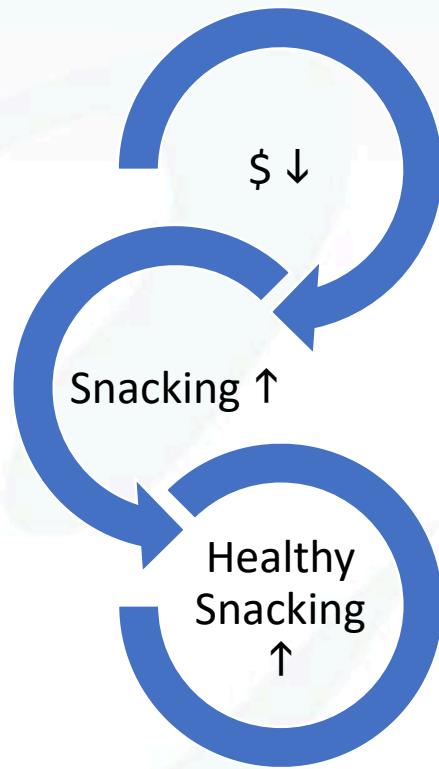
Swapping Meals for Snacks: #1 Driver = Financial



- **Dunnhumby**: 36% of U.S. families have skipped meals due to financial reasons
- **Del Monte**: 80% of parents vs. 66% of non-parents frequently substitute meals with snacks
- **IFIC**: 56% replacing traditional meals with snacks or smaller meals



Another Piece of the Puzzle...



*To align **natural items** as part of a healthy mini meal, the key is **positioning them as intentional**—through:

- Balance
- Portion control
- Nutrient-rich pairings

YouGov: consumer snack priorities include ingredients (58%), nutritional value (48%)



Feeding Kids Under Budget Stress

Family logic is driving format innovation.

At Restaurants:

- Share plates.
- Kids split adult portions.
- Skip add-ons.

Circana: 50% choose lower-priced restaurants; value-seekers are 33% more likely to switch chains.

C3: 93% favor free kids' giveaways; 96% say it increases excitement; 88% more likely to visit more.

At Home:

- Hybrid meals (prepared + homemade).
- Stretch proteins.
- Simplify menus.

FMI: 56% Millennials, 42% Gen Z seek meal-planning support; rely on deli-prepared meals.

FMI: Prepared food purchases doubled (12% to 28%); 85% shifted foodservice spend to grocery-prepared meals.

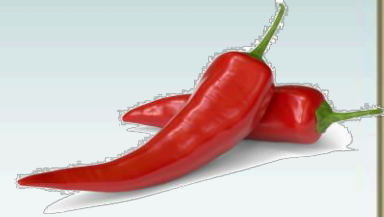
FMI: value is top priority for 82% of consumers; (73% of parents are extremely or very concerned).

Practical Indulgence in Food & Beverage





What's Causing Bolder Flavors?



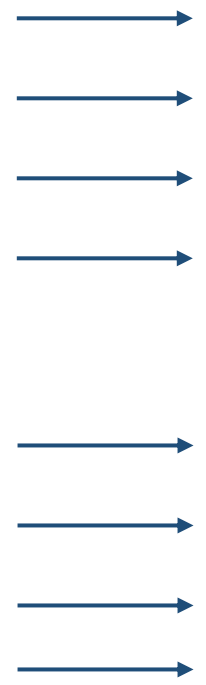
Inflation Behaviors: Pre-Covid

Reaction

- Fear ↑
- Emotional shutdown ↑
- Panic ↑
- Motivation ↓

Action

- Risk-taking ↓
- Exploration / Experimentation ↓
- Travel ↓
- Comfort food ↑



Inflation Behaviors (*Now*): Post-Covid

Reaction

- Fear set point ↑: less reactive
- Cautious, No emotional shutdown
- Stress ↑, Not panic
- Motivation unaffected

Action

- Risk-taking tempered, but remains strong
- Exploration / Experimentation remains strong
- Travel ↑: Global flavors ↑
- Extremes on palate ↑: citrus, chilies, heat, spice ↑

How Bold Flavors Come to Life



Mintel: 45% of U.S. consumers say they actively seek out spicy or bold-flavored food & beverage.

Drivers: Tone/Voice

- Thrilling Comfort: comfort flavors with spice & heat
 - Wake Up Senses: pickled, blistered, aged, smoked
 - Wild Not Mild: complex heat
 - Sour: dressings, sauces, and condiments
 - Sweet Fusions: swalty, swicy, swokey, swangy
-
- Heritage: taste & experience history
 - Newstalgia: nostalgia with a modern twist
 - Nostalgia: food tied to a time and place in history
 - Rewarding: rich flavors, indulgent texture
 - Lux: affordable indulgences
-
- Textural: foams, jellies, flaky, crunchy
 - Unexpected: Create contrast and intrigue
 - Visually Engaging: bold colors, textures



Practical Indulgence Defined

Consumers aren't buying more — they're buying better moments.

Defined

- Small luxury.
- Contained price.
- High sensory reward.
- Flavor is cheaper than protein.



Sensory Framing

- Contrast-driven plating.
- Texture layering.
- Aroma-forward builds.
- Heat, acid, crunch, finish.



Behavioral Anchors

- Feels like a reward.
- Signals intention.
- Earned indulgence.
- Emotional permission

Flavor Upgrade

Bold flavor creates premium perception without protein inflation.

- Global sauces.
- Heat-driven profiles.
- Wake up the sense.
- Layered spice blends.



Portion Architecture

Structure influences perceived value.

- Half portions.
- Shareables.
- Samplers.
- Flights
- Modular bowls.



Snack-Structured Solutions

Snacks needs intentional design.

1) Mini Meal Boxes

Strong Start Mini Box

Egg bites or egg wrap + roasted potatoes + Protein smoothie or cold brew

Why: Designed for speed and satiety. Replaces breakfast at home while signaling real fuel.

2) Protein-Forward Snack Plates

Global Protein Plate

Ex: Grilled chicken or tofu + roasted vegetables + trio of global sauces = Harissa yogurt, chimichurri, chili crisp dip

Why: Feels like a full meal in a smaller footprint. Bold flavor creates premium perception without increasing cost.



Beverage That Earns Its Place

Standalone beverages are vulnerable.

1) 🍹 Flight-Worthy Beverages

🌍 Global Flavor Flight

- Mini pours: hibiscus-chili, yuzu-mint, tamarind-lime

Why: Exploration remains strong even under financial caution. Smaller portions lower price barrier while increasing experience.

2) 🧊 Functional Fuel Beverages

💧 Hydration Boost Refresher

- Sparkling citrus water + electrolytes
- Add-ins: Cucumber, mint, or chili-lime twist

Why: Hydration remains a daily justification. Light, refreshing, and perceived as “smart,” not indulgent.



Dessert as a Micro-Splurge

Make indulgence affordable.

1) ✨ Mini Dessert Moments

🍫 Chocolate Micro Pot

•3–4 oz dark chocolate mousse + Chili sea salt or espresso finish

Why: Small luxury. Contained price. Feels intentional, not excessive. Satisfies “I deserve one treat” without full-dessert commitment.

2) ✨ Shareable Sweets

🍩 Warm Doughnut Board

•6 mini doughnuts + 3 dipping sauces

Why: Families justify shared indulgence more easily than individual desserts. Feels celebratory, spreads cost.



Designing for Budget Reality





Justifying the Upgrade

Invisible premiums fail.



Consumers Trade Up When:

- Benefit is visible.
- Flavor is bold.
- Craft feels real.
- Function solves something.

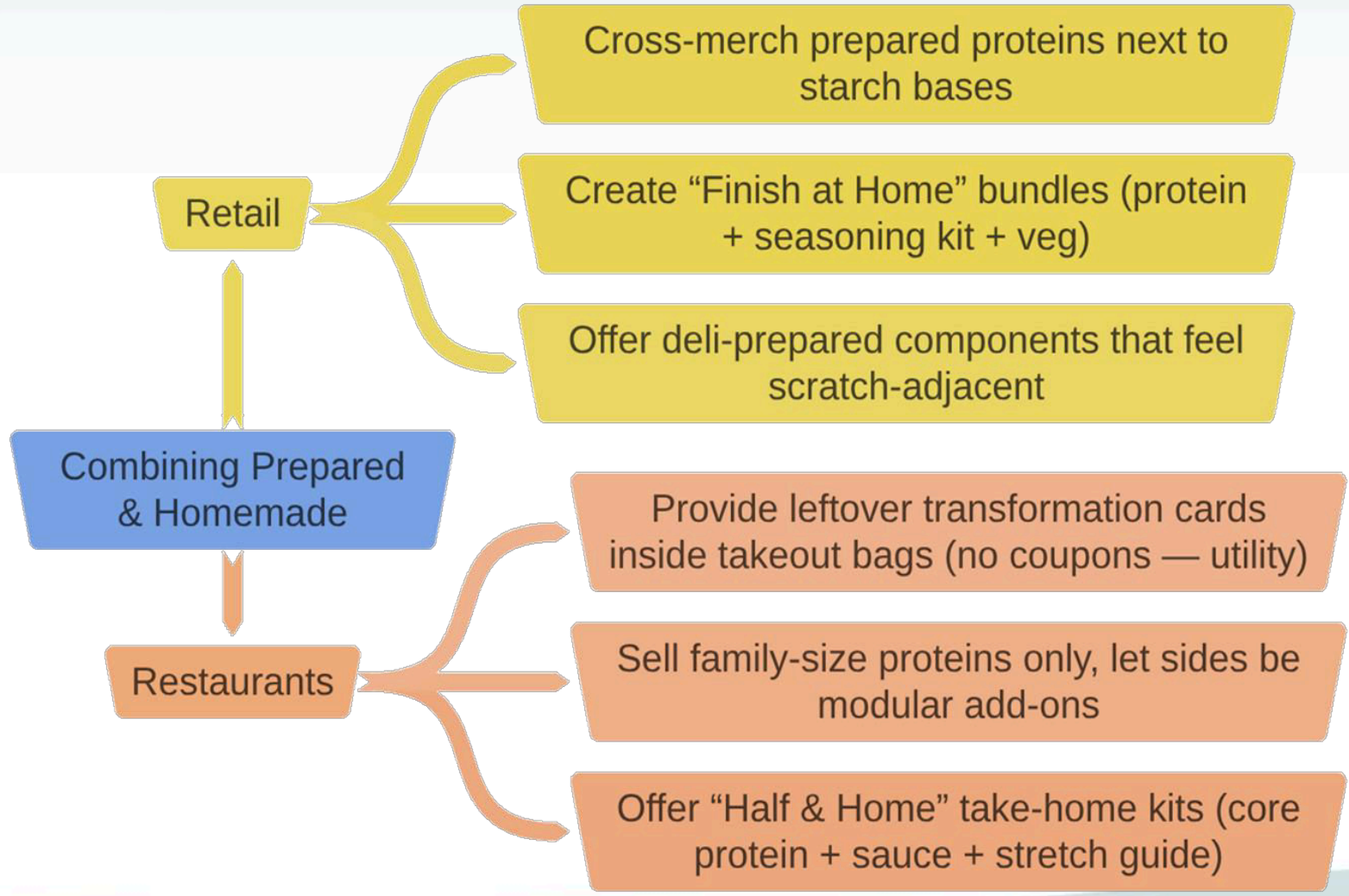


Hybrid Feeding at Home: Prepared + Homemade

Design foods that don't end at purchase.
Design foods that continue at home.

Why It Works:

- Consumers want help — not full replacement.
- You're selling support, not substitution.
- They want to feel smart, capable, resourceful — not dependent.



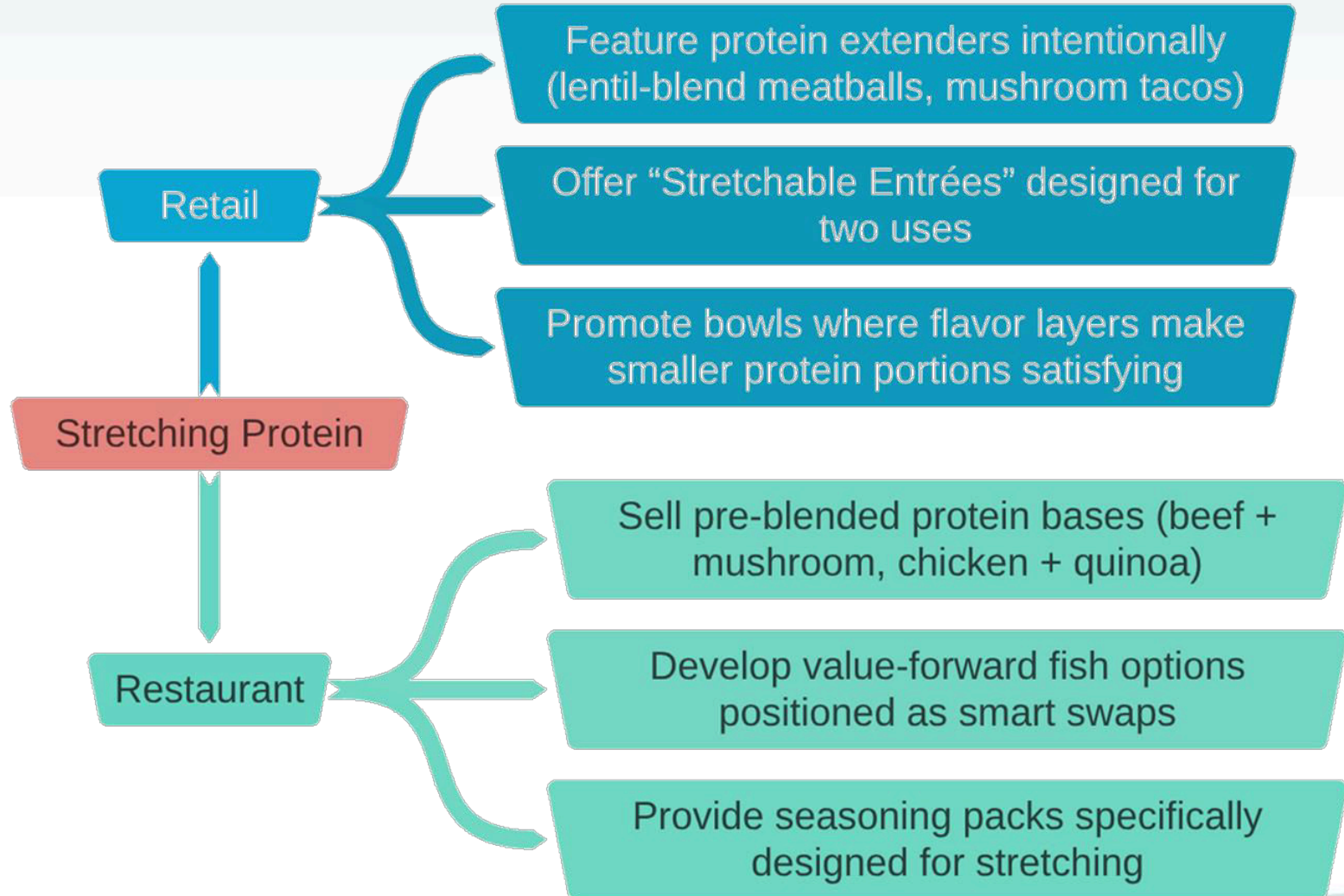


Hybrid Feeding at Home: Stretching Protein

Design foods that don't end at purchase.
Design foods that continue at home.

Why It Works:

- Consumers aren't trying to eat less — They're trying to make it last.
- Flavor depth protects perceived fullness.
- Protein inflation doesn't have to mean menu inflation.



Bundling by Need State

Goal	Target Consumers	Format Favorites	Consumption Style
Strong Start (Morning)	<ul style="list-style-type: none"> • Morning Commuters • Busy Parents • Students & Young professionals 	<ul style="list-style-type: none"> • Breakfast wraps & handhelds • Protein-forward sandwiches • Breakfast bowls 	<ul style="list-style-type: none"> • Eat-now, on-the-go • One-handed eating
Power Through (Mid-day)	<ul style="list-style-type: none"> • Office workers • Students studying • Drivers and Delivery Workers 	<ul style="list-style-type: none"> • Fresh wraps & paninis • Grain or protein bowls • Snack boxes (protein + produce) 	<ul style="list-style-type: none"> • Quick break eating • Desk-friendly meals
Pre & Post Workout	<ul style="list-style-type: none"> • Fitness Enthusiasts • Active Adults 	<ul style="list-style-type: none"> • Protein snack packs • Lean protein bowls • Wrap halves or mini bowls 	<ul style="list-style-type: none"> • Fast digesting • Portable, Travels well
Wt Management	<ul style="list-style-type: none"> • Health Focused: diet goals • Mindful Eaters 	<ul style="list-style-type: none"> • Portion-controlled bowls • Mini salads • Half sandwiches / wraps 	<ul style="list-style-type: none"> • Portion-controlled • Flexible meal replacement
Stress Relief	<ul style="list-style-type: none"> • Stressed Professionals / Students • Overextended Parents • Burned-Out Workers 	<ul style="list-style-type: none"> • Familiar, global handhelds • Grain-based bowls • Balanced snack packs 	<ul style="list-style-type: none"> • No mess, Easy cleanup • Slow, grounding bites
After-School Fuel	<ul style="list-style-type: none"> • School-Age Kids • Teen Athletes • Family Caregivers 	<ul style="list-style-type: none"> • Snack packs (protein + carbs) • Mini sandwiches & sliders • Shareable family packs 	<ul style="list-style-type: none"> • Eat-now in car • Shareable, family-friendly

Translating to Culinary Strategy





Where to Preimmunize

Preimmunize emotion, not volume.

Preimmunize:

- Sauces.
- Add-ons.
- Beverage programs.
- Limited runs.
- Global flavor layers.





The “Budget Stress” Culinary Filter

Before Launching Ask:

- Would this survive beverage cuts?
- Would this replace a meal?
- Can it be shared?
- Is the premium obvious?
- Does it flex across dayparts?

If not ... it may struggle in 2026.



Navigate:
THE FUTURE



The Danger Isn't Traffic — It's Behavior

The Silent Margin Killers

▼ 1. Trade-Down at the Core, Trade-Up in Moments

- Fewer premium proteins, more value species and blends
- Smaller alcohol spend, more non-alcoholic or at-home cocktails
- One intentional indulgence instead of three impulse add-ons

Translation: Premium must feel obvious. Invisible upgrades die first.

🍷 2. Meal Replacement Accelerates

- Snacks replacing meals
- Protein-forward mini formats
- Functional beverages replacing breakfast or lunch

Translation: Financial stress pushes people toward controlled portions with purpose.

🧠 3. Emotional Budgeting Intensifies

You'll hear more of this internal math:

- "We'll skip drinks."
- "Let's share."
- "I deserve one thing."

Translation: This is not panic spending. It's selective spending.

🍴 4. Flavor Exploration Continues

- Spicy and bold flavors hold
- Global sauces grow
- Flavor upgrades substitute for protein inflation

Translation: Flavor is cheaper than meat. And novelty prevents boredom during restriction.

Final Thoughts

- Consumers are reallocating, not retreating — design accordingly.
 - Snacks are replacing meals — design them intentionally.
 - Bundle by need state, not by discount.
 - If it can't survive beverage cuts, rethink it.
 - Design for stretch and splurge simultaneously.
 - The brands that win make trade-offs feel empowering.
-
- Know the birth and lifecycle of a trend prior to deciding to recommend it so you can predict how to navigate it.
 - Spend more time researching a trend's longevity & trajectory than worrying about what your competitors are doing - after all ... they may be idiots.



Thank You!



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45 YEARS Natural Products EXPO WEST®

The logo features a large '45' in a dark red color, with 'YEARS' written in a smaller font inside the '5'. To the right of the '45' is the text 'Natural Products' in a dark grey font, with a small circular sunburst icon above the word 'Natural'. Below 'Natural Products' is 'EXPO WEST' in a dark red font, followed by a registered trademark symbol (®).



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