R&D INSIGHTS AND INNOVATIONS - JANUARY 2026 VOL. 195, NO. 1

prepared FOODS

Keep It Clean

FRUIT-BASED SWEETENERS ADD APPEAL

New Global Entrees, Snacks & Sides

Trend: Precision Wellness

GLP-1 at Retail, Foodservice

Private Label Powers Up!

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New Products

Bistro Flavor—Any Time

Nissin Foods (USA) Co. Inc., Gardena, Calif., extended its Cup Noodles brand with a three-item Ramen Bistro line that turns "any microwave into your personal ramen bistro that's Open 24/7."

"Inspired by your favorite restaurant ramen, the new line delivers diverse flavors like Sichuan Garlic Chicken, Korean Gochujang Beef, and Japanese Miso in just three minutes," the company says.

Each Ramen Bistro variety uses chili-infused noodles, premium vegetables, and Asian broths. Suggested retail is $1.59. To bring the bistro home, Cup Noodles partnered last fall with miniature artist @PandaMiniatures to transform an actual microwave into a tiny ramen restaurant

Classic Soy Noodles

Fly By Jing, Los Angeles, said it introduced its first "non-spicy" offering, Classic Soy Noodles: sun-dried and knife-cut noodles and an accompanying sauce made from premium soy sauce and scallion. It delivers 12g of protein per serving for a meal that's ready in six minutes.

The new Classic Soy Noodles are available direct to consumer, via TikTok Shop and Amazon, Costco (exclusive packout + price, 6-pack + mini 2oz Original Chili Crisp, all for $12). and select retailers.

Swicy Fun

Maruchan Inc., Irvine, Calif., extended its yakisoba noodle line with two bold flavors: Fire Mango Habanero and Fire Pineapple Jalapeño.

"At Maruchan, we're always exploring new ways to innovate and meet the evolving tastes of our community," said Mark Machino, manager of sales and marketing. "Younger consumers, especially Gen Z and millennials, are looking for exciting, restaurant-inspired flavors they can enjoy at home, and that's exactly what our new Yakisoba flavors deliver. Mango Habanero and Pineapple Jalapeño tap into the bold 'swicy' trend in a way that's fun, unexpected, and super convenient."

Yakisoba Mango Habanero and Pineapple Jalapeño are available on Amazon and at retailers nationwide including 7-Eleven Meijer, Giant Food Stores and Lowes Foods.

Latin Flavors

Nestlé Professional Solutions, Solon, Ohio, launched two empanada products in partnership with TOMA, a joint venture between Everybody Eats Hospitality Group and Latin World Entertainment. TOMA, Miami, was created at retail by actress Sofía Vergara and her son, Manolo Gonzalez Vergara. New offerings include a Beef Empanada, with beef, sweet tomatoes, kalamata olives, onions, paprika and chilis; and a Chicken Empanada, with pulled dark meat chicken in a tomatillo, jalapeño, cilantro and garlic Salsa Verde.

"With TOMA, we're bringing something truly special to operators: chef-approved flavors and ingredients with a convenient back-of-house solution," said Fleur Veldhoven, vice president of marketing at Nestlé Professional Solutions. "Our collaboration with Sofía and Manolo means operators can serve authentic, Latin-inspired dishes with confidence and consistency."

The ready-to-heat empanadas ship frozen and can be cooked from frozen or thawed in a TurboChef®, convection oven, or fryer.

Tasty Collaboration

Laoban Dumplings, Washington, D.C., partnered with Japanese barbecue sauce maker Bachan's Inc., Sebastopol, Calif., to create a Taiwanese Popcorn Chicken with Bachan's Original Japanese Barbecue Sauce. The limited-edition product debuted at select Whole Foods Market stores nationwide and was available through January 2026.

"This is the first-ever collaboration for Laoban, and it felt like such a natural fit," said Patrick Coyne, co-founder and CEO of Laoban. "Bachan's Japanese Barbecue Sauce has such a rich, authentic flavor, and it's the perfect complement to our Taiwanese-style popcorn chicken. We wanted to create a dish that's easy to prepare at home, without sacrificing the quality and flavor that our customers expect."

Fresh Family Favorites

Del Real Foods, Jurupa Valley, Calif., extended its refrigerated, heat-and-eat Hispanic foods line with Ropa Vieja at Walmart. Another new offering, Del Real's Chicken Fajitas, also made its Walmart debut. Ropa Vieja features 100% USDA Choice Beef with a traditional blend of spices and sautéed bell peppers and onions.

"We're thrilled to continue growing our partnership with Walmart, while introducing even more bold, convenient, and delicious Hispanic dishes," said Socorro Morales, vice president of marketing at Del Real Foods. "By bringing Ropa Vieja and our other favorites to additional stores, we're making it easier for families nationwide to enjoy abuela-inspired dishes made with real, high-quality ingredients, while also providing convenience for busy families."

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No Takeout Needed

Ajinomoto Foods North America Inc., Ontario, Calif., extended its Tai Pei brand with two new frozen single-serve noodle trays: Tai Pei Shrimp Chow Mein and Tai Pei Vegetable Chow Mein. Officials say both feature" sauce-infused" noodles. Both are available nationwide for a suggested retail price of $4.18.

"We know our consumers want more from frozen entrees - more flavor, more convenience, and more of that craveable, takeout-style satisfaction," said Amy Shoemaker, vice president, category marketing. "Our new Chow Mein offerings are built for exactly that: bold, savory flavor in a fast, single-serve format that delivers value without compromising on taste or satisfaction."

Taste of India

Deep Indian Kitchen, Union, N.J., bolstered its frozen line with three Kati Street Wraps : (Coconut Chicken Curry, Chicken Biryani, and Matar Paneer) as well as a vegetarian Butter Paneer entrée.

"Our Kati Street Wraps have experienced strong momentum since launch, with consumers responding to their bold, authentic flavors and convenient format," said Kiernan Laughlin, general manager of Deep Indian Kitchen. "As interest in global cuisine continues to grow, we're proud to expand the lineup with new varieties like Coconut Chicken Curry – one of the fastest-growing Indian flavors in retail. These additions reflect our commitment to making premium, authentic Indian food more accessible, offering consumers a convenient and flavorful way to explore global flavors at home."

New Flavor, Better Texture

The Momofuku restaurant group's Momofuku Goods business, New York, N.Y., said it upgraded its packaged Momofuku Goods Noodles line and introduced a new variety: Sesame Miso. Officials said the line features improved flavor, texture and refreshed packaging. They noted the new Sesame Miso flavor "introduces a savory twist that complements a wide range of dishes, from soups and stir-fries to cold salads."

"Since launching in 2021, our noodles have become our company's top-selling product line," said Paddy Spence, CEO of Momofuku Goods. "With success came passionate feedback: thousands of reviews, DMs, and emails offering praise and suggestions. We listened, leading to our most significant update yet. This reimagination is about giving our fans exactly what they asked for to make every bite even better."

Comfort + Nutrition

KANZEN MEAL (U.S.A.) Inc., Los Angeles, said it expanded distribution to the Northeast and added two more varieties to its frozen meal line. New SKUs include Spaghetti Carbonara and Spicy Dan Dan Noodles, a Sichuan inspired dish combining rice noodles in a sesame sauce with edamame and green onions. Officials say KANZEN MEAL uses Japanese culinary techniques and precisely creates nutrient-dense meals rooted in the familiarity of tasty comfort foods.

All five KANZEN varieties deliver up to 24g of protein, 10g of fiber, more than one-third of the Daily Value (DV) for all 27 essential vitamins and minerals with 0g added sugars. Each KANZEN MEAL dish has between 460-560 calories and contains one-third or less of the DV for sodium. KANZEN MEAL retail for between $6.99 and $7.99. KANZEN MEAL is part of Nissin Foods Holdings Co. Ltd.

Bring the Heat!

Nissin Foods USA, Gardena, Calif., introduced a Geki line of ramen noodles in two varieties: Spicy Carbonara Chicken and Spicy Hot Chicken. Officials say Geki translates to "intense" or "extreme" in Japanese, and the new flavors deliver a "unique spicy noodle experience with every bite."

"Ramen fans love bold, intense flavors," said Senior Vice President of Marketing Priscila Stanton. "With Geki, we're turning up the heat while staying true to Nissin's commitment to quality and accessibility. These new flavors offer a range of spice levels to suit every taste—delivering an exciting, bold noodle experience without the premium price tag."

Geki noodles are now available in packs of five for just $6.49 at select retailers nationwide, including Kroger and Albertsons.

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New Products

Comfort Meets Convenience

Canada's Maple Leaf Foods Inc., Mississauga, Ont., introduced Musafir, a frozen line of South Asian-inspired, protein-forward vegetarian and chicken-based offerings. Products include Paneer Burgers and Paneer Bites, Masala Paneer Bites, Popcorn Paneer, Masala Omelette Bites and Butter Chicken Bites. Protein sources include paneer cheese, eggs, chickpea, and chicken.

"Musafir was developed to explore how food can connect people to culture, memory, and new experiences," said Jitendra Sagili, Chief R&D and food technology officer at Maple Leaf Foods. "We're excited to introduce a brand that meets the growing appetite for bold flavors while delivering the quality, convenience, and innovation our consumers want. Whether it's nostalgic tastes of home or a new global flavor experience, Musafir brings rich traditions into familiar formats that are easy to enjoy."

Global Snacking

SPI West Port Inc., San Francisco, said it relaunched its Woodridge Snacks brand with three new offerings. They include Vacuum-Fried Brussels Sprouts with Sticky Rice Chips (seasoned with Thai chili sauce), and a Mediterranean Mix with vacuum-fried eggplants, sweet peppers, zucchinis, and onions combined with Thai sticky rice chips and Mediterranean spices. A third item is the Mango Fruit Roll, a sweet, slightly crispy and chewy snack with more than 82% real mango fruit, the company says.

Commenting on the launch were SPI West Port founder and CEO Henry Chen and Executive Vice President Brian Choi.

"Inspired by the globalization of regional foods and the eclectic fusion cuisines that have united different cultures throughout history, Woodridge Snacks searches the world for the very best ingredients and techniques," they said. "From the tropical farms of Asia, the mountains of South America or the rustic heartland of America, the best ingredients deliver the best flavors and we look forward to introducing many more new snack varieties and to continuing our retail and foodservice expansion over the years ahead."

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Sweden's Sweet Snack

Orkla ASA, Oslo, Norway, brought its BUBS candy brand to the US with a retail pop-up "Sweeteasy" in New York City's SoHo district. A Swedish favorite since 1992, BUBS became an international find in 2024 when TikTok covered chewy-meets- foamy texture and playful skull and oval designs. BUBS candies will be distributed at national US chains including Target, Walmart, Kroger, Albertsons, CVS, Five Below and Walgreens.

"Our first-ever U.S. pop-up marks an incredibly exciting moment for BUBS," said Åsa Gisel, head of marketing at BUBS. "We're thrilled to finally invite American fans to experience our candy and our culture in person. The Sweeteasy celebrates the Swedish tradition of lördagsgodis while giving U.S. fans a chance to taste and take home a piece of the joy that makes BUBS so beloved."

Fiesta Time

Ajinomoto Foods North America, Ontario, Calif., extended its frozen José Olé line with two new Premium Taquito options, in Birria Beef and Pollo Asado (SRP $8.99). Officials say Birria Beef delivers savory flavors from the Mexican state of Jalisco with tender shredded beef slow-cooked in herbs, spices, and ancho chiles. Pollo Asado features antibiotic-free grilled chicken seasoned with classic asado spices.

"We know our fans want more from their snacks - more flavor, more satisfaction, and more ways to enjoy every bite," said Amy Shoemaker, vice president, CPG Sales at Ajinomoto Foods North America. "With our new Premium Taquitos, we're raising the bar with bold, savory meats and vibrant seasonings that turn snack time into a truly delicious experience."

Sweet, Spicy Blends

Chili-dusted dried fruit snacks maker CHUZA, San Diego, extended its line with three new Trail Mix options debuting in Whole Foods. Clásico features dried cranberries, roasted peanuts, cashews, and crunchy almonds. Barrio included roasted peanuts, crispy sesame chips, crunchy corn sticks, hearty corn nuts, almonds, and pepitas. A Tropical version includes roasted peanuts, buttery almonds, crispy sesame chips, crunchy cashews, golden corn nuts, and juicy dried pineapple.

"These trail mixes represent a major milestone for CHUZA," said CHUZA Founder Danny Schwarz. "This launch allows us to expand our reach into new snacking occasions while staying true to what CHUZA stands for — quality ingredients, bold flavors, and a celebration of our culture, and we are super excited to be launching them with Whole Foods Market, which has been a great supporter of CHUZA and so many emerging brands."

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Weighty Topic

Circana projects GLP-1 medication users will impact 35% of U.S. food and beverage sales by 2030.

Credit: Svitlana Pietukhova / Getty Images

Rapid adoption of GLP-1 medications is fundamentally reshaping U.S. consumer spending habits and creating significant shifts in the retail sector, according to new research from Circana LLC.

The findings show that households using these medications, which currently account for 23% of all U.S. households, are projected to represent 35% of all food and beverage units sold by 2030, signaling a critical need for retailers and manufacturers to adapt.

The research highlights a clear pivot toward healthier lifestyles among GLP-1 users, driven by a 41-point increase in weight management being cited as their primary health goal since 2021. This shift directly impacts purchasing decisions, with consumers altering their baskets to align with new dietary preferences.

Key findings from the Circana report include:

- Spending on traditional retail food and beverages has decreased among GLP-1 users while their spending at restaurants has increased.
- Users are actively seeking products higher in protein, fiber, and healthy fats while purchases of items high in carbohydrates and sugar are declining.
- Though they have reduced their overall retail food and beverage purchases, GLP-1 users still outspend non-users.
- After discontinuing medication, consumers sustain some purchasing behaviors, with continued growth in produce, personal care, and household plastics/storage.
- Other behaviors reverse post-medication, with a rebound in purchases of beverages and items from the refrigerated and frozen food departments.

"The rise of GLP-1 medications is a huge moment for the CPG industry," said Sally Lyons Wyatt, global executive vice president and chief advisor for Circana. "Our research shows shopper priorities are evolving quickly and dramatically. It's vital for retailers and manufacturers to pay close attention to these trends. The key to future success will be adapting product selections and marketing to line up with the new health-focused mindset of this growing group of shoppers."

The study also found that despite the high cost being the primary reason for discontinuing use, 50% of previous GLP-1 users are likely to use the medications again in the future. This indicates a sustained impact on the market as consumers move in and out of active medication use but retain the health-conscious behaviors they adopted.

Circana hosted its own related webinar addressing this trend. Learn more about *"GLP-1 Unlocked: Retail Impacts in a New Era of Accessibility."*

About Circana

Circana is a leader in providing technology, AI, and data to fast-moving consumer packaged goods companies, durables manufacturers, and retailers seeking to optimize their businesses. Circana's predictive analytics and technology empower clients to measure their market share, understand the underlying consumer behavior driving it, and accelerate their growth. Learn more at circana.com

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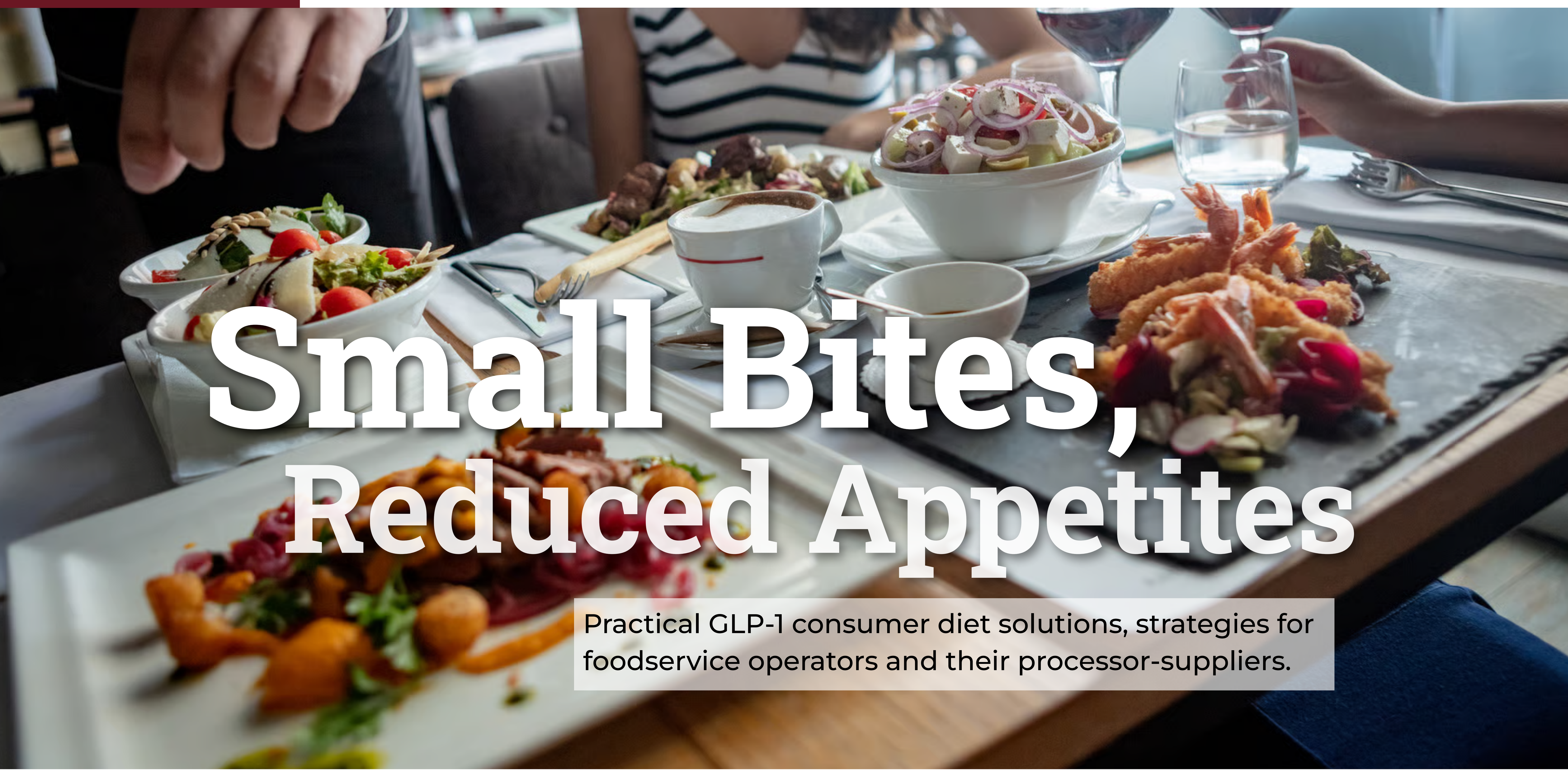
Processing Agents



Small Bites, Reduced Appetites

Practical GLP-1 consumer diet solutions, strategies for foodservice operators and their processor-suppliers.

Credit: webphotographeer / Getty Images

By Stephanie Lind

Ozempic and Wegovy aren't just trending—they are rewriting the foodservice playbook. These GLP-1 drugs, originally developed for diabetes, have become powerful tools for weight management. But here's the real story for foodservice: they're not just changing waistlines; they're transforming the way consumers dine.

Here are some ways savvy operators can adapt to the challenge of feeding people who aren't really hungry.

GLP-What Now?

GLP-1 drugs work by increasing insulin production and slowing the movement of food from the stomach to the small intestine, making people feel fuller, longer. For diabetes patients, that means better blood sugar control. For weight-loss users, it means eating less (16-39% fewer calories, as found in this study), as they shift from eating for pleasure to eating for necessity.

Here's the kicker: GLP-1 users still want to dine out. Breaking bread together is both a primary social occasion and a foundational human experience. Consumers are not opting out of restaurants, but out of oversized entrées and empty calories. Operators (and their suppliers) who understand this can turn a challenge into an opportunity.

If restaurant guests aren't as hungry as they used to be, what do operators serve? Here's what matters now:

Smaller Plates, Smarter Menus**:** Snacking is already a growing daypart, and GLP-1s only accelerate that trend. Operators and processor-suppliers need to think about half-portions, mix-and-match plates and sampler menus. Smaller plates aren't just for GLP-1 users either; they appeal to health-conscious consumers focused on portion control or variety, too. Less food, better presentation, more flexibility.

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Protein First: GLP-1 users worry about losing muscle mass, especially if they pair medication with exercise. High-protein options including lean meats, legumes and dairy should be front and center. Protein intake is a priority for consumers, so protein should be the menu hero.

Nutrient Density Matters: When people eat less, every bite counts. Expect guests to care more about vitamins, minerals and overall quality. Operators will want to highlight nutrient-rich ingredients and consider adding nutrition callouts on menus.

Elevate the Experience: If food is less of a focal point, the dining experience becomes more important. The atmosphere, service and social connection matter more than ever. Operators need to create spaces that feel communal and welcoming, where guests come for the ambiance as much as the meal.

Reduce Food Costs and Increase Traffic: Ultimately, setting the table with portion choice and consumer flexibility isn't just good for appetite management; it's a smart hedge against being left with empty seats and wasted food. Right-sized portions lower food costs, reduce waste, and lead to better margins.

Accommodating this new way of eating can increase traffic as millions of GLP-1 users eat less by skipping appetizers, ordering appetizers as entrees, sharing plates, or otherwise opting for smaller portions. Families and groups will choose operations where the menu and the atmosphere feel welcoming to everyone.

Marketing that includes a variety of flexible sizes and presentations, high-protein and high-nutritional menu options, plus a welcoming, experiential atmosphere will bring in today's consumers. With more than 83% of consumers reviewing menus, and 50% making their order decisions before they go out to eat, clear messaging about flexible, inclusive menuing will fill seats and increase (right-sized) orders.

Smaller Plates, Bigger Picture.

GLP-1s are more than a headline. They're catalysts for change in foodservice. Appetite suppression is already reshaping consumer behavior, and operators who respond with flexible portions, smarter menus, and nutritional highlights, and who include those messages in their marketing strategies, will be ahead of the curve.

From reducing plate waste to influencing supply chains, the impact goes beyond the dining room. It's not about chasing a trend but about preparing for a new normal where eating less (and serving consumers appropriately) is part of the equation.

Stephanie Lind is founder and CEO of Elohi Strategic Advisors (ESA), a national, women-owned foodservice accelerator that helps manufacturers and brand succeed in a complex foodservice channel. With a no-nonsense approach and deep industry expertise, ESA delivers integrated strategy and execution across marketing, sales ops and enablement. Whether you're launching, scaling, or course-correcting. Write us at info@elohi.us or visit https://www.elohi.us

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Precision Wellness

Food, beverage processors address consumer demand for personalized health.

Consumers increasingly select products delivering specific benefits, such as collagen for muscle, bone and joint health. Credit: PrathanChorruangsak / getty images

By Lu Ann Williams

Precision wellness represents a natural evolution from functional nutrition. While functional nutrition offers nutrition for all, precision wellness drills down to address an individual's personalized health needs.

Our various Innova Market Insights surveys show how consumer interests have evolved as consumers become more aware of specific ingredients and their potential for improving individual uniqueness in physical health, metabolic health, mental health, and cognitive function.

A Top Trend

Innova's Top 10 Trends 2025 acknowledged the prominence of precision wellness by naming it last year's second leading trend. It focuses on how critical it is to target the nutrition needs of individuals. One size doesn't fit all. Consumers differ in age, gender, lifestyle, preferred diet, activity level, health condition, and many other factors. Health perspectives and goals help define their diets. So many consumers look for functional foods, beverages, and ingredients to address what they perceive that they alone need for their stage in life, health status, lifestyle, activity level, fitness needs, and so many other factors.

In one of our annual surveys, a majority of consumers told us they believe that customized nutrition plans are more effective. Furthermore, supplement users solidly seek choices that can be personalized to meet their individual needs.

In looking at product launch trends in precision nutrition, we divided nutrition into several different groupings based on profiles and needs: balanced, age-specific, gender-specific, lifestyle, condition-specific, and performance. A majority of US consumers we surveyed name balanced nutrition as their preferred approach. Significant numbers, however, also reported buying age-specific nutrition products. Smaller but significant numbers also turn to nutrition products targeted toward their gender, lifestyle, health conditions, and performance needs.

US consumers lean toward regular foods and drinks as their preferred sources for targeted nutrition, followed by supplements, fortified foods, and fortified drinks.

At the moment, the level of consumer interest in and desire for precision wellness—especially that tailored to lifestyle, performance, and health condition—exceeds the level of actual purchases. That is why manufacturers and brands have an opportunity to expand development of products with targeted nutrition benefits.

Precision Wellness in 2026

As in 2025, our Top 10 Trends for 2026 demonstrate the importance of precision wellness. This year's leading trend is "Powerhouse Protein." Even though protein has been a nutrition trends leader for the past several years, it does not appear to be slowing down.

Consumers associate protein with wellness and they seek protein in various forms to support overall health and wellbeing. Our consumer trends surveys show the majority of those surveyed are looking for ways to include more protein in their daily diet. What an enviable position for a nutrient!

Consumers name milk and milk drinks as top protein sources, and they look for other sources of protein as well. Labels can improve product positioning and competitiveness by calling out highly desired protein benefits, such as muscle support and support for those consumers on GLP-1 anti-obesity medications.

Labels also can offer nuanced positioning that highlights protein features and other protein benefits such as essential amino acids, complete protein, muscle repair and recovery, and muscle strengthening and support. The protein marketplace is highly competitive, so we are expecting nuanced protein messaging with promoted benefits that match the specific type of protein. For example, a product might highlight the contribution of whey protein to essential amino acids and muscle health support.

Gut health is another enduring trend. Consumers increasingly associate gut health with overall wellness. They know when their gut doesn't feel right and they look for ways to improve how they feel. The consumers we surveyed demonstrate a high level of knowledge regarding the relationship between gut health and related benefits of immunity, energy, and healthy skin. Related product launches tracked by Innova show growth in claims about probiotics and especially prebiotics. There's also more on-pack language addresses how biotics work, and that calls out tangible benefits.

A balanced mind is another one of our top trends for 2026. Consumers feel stressed and are looking for ways to achieve better mental health. They want to have more energy, reduce their stress levels, and perform better mentally. Millennials in particular are highly concerned about their mental health. Some product launches we track for mental health benefits have included an energy drink with green tea and nootropic functional mushrooms. There's also been a host of new products featuring the ayurvedic herb ashwagandha.

Beverages will continue to be big in 2026 as a preferred functional format. They lead innovation for hydration, functional ingredients, and convenient nutrition. Protein-rich beverages are popular—especially in a new wave of soft drinks with protein ingredients that are clear. Don't overlook dairy-based drinks, which consumers surveyed by Innova say are a healthy snack beyond their protein content.

We also are tracking innovation in products such as indulgent coconut water with electrolytes for hydration and calcium-fortified, protein-rich flavored milk promoted for strong bones, tooth development, and tissue building and growth.

Game Changer: GLP-1

GLP-1 anti-obesity medication users have changed their eating habits. Because consumers on GLP-1 medications are eating much less food during the day, nutrient density is essential.

Key nutrients include protein to maintain muscle; fiber to ensure gut health and regularity; and vitamins and minerals for the body's daily and long-term nutrition needs. In addition to GLP-1-friendly packaged meals innovation, we are tracking ingredients and supplements that claim to activate and sustain GLP-1 in the body.

Women's Health Growing

We are closely watching the evolution and expansion of precision wellness positioning for women.

Recent product launches include teas with female health benefits and sports nutrition products targeted to women. Supplement approaches that could cross over into food and beverage include general women's health, menopause support, and age-specific nutrients. This is not to overlook men, as new products specifically positioned for men also are emerging.

Precision Wellness for Healthy Aging

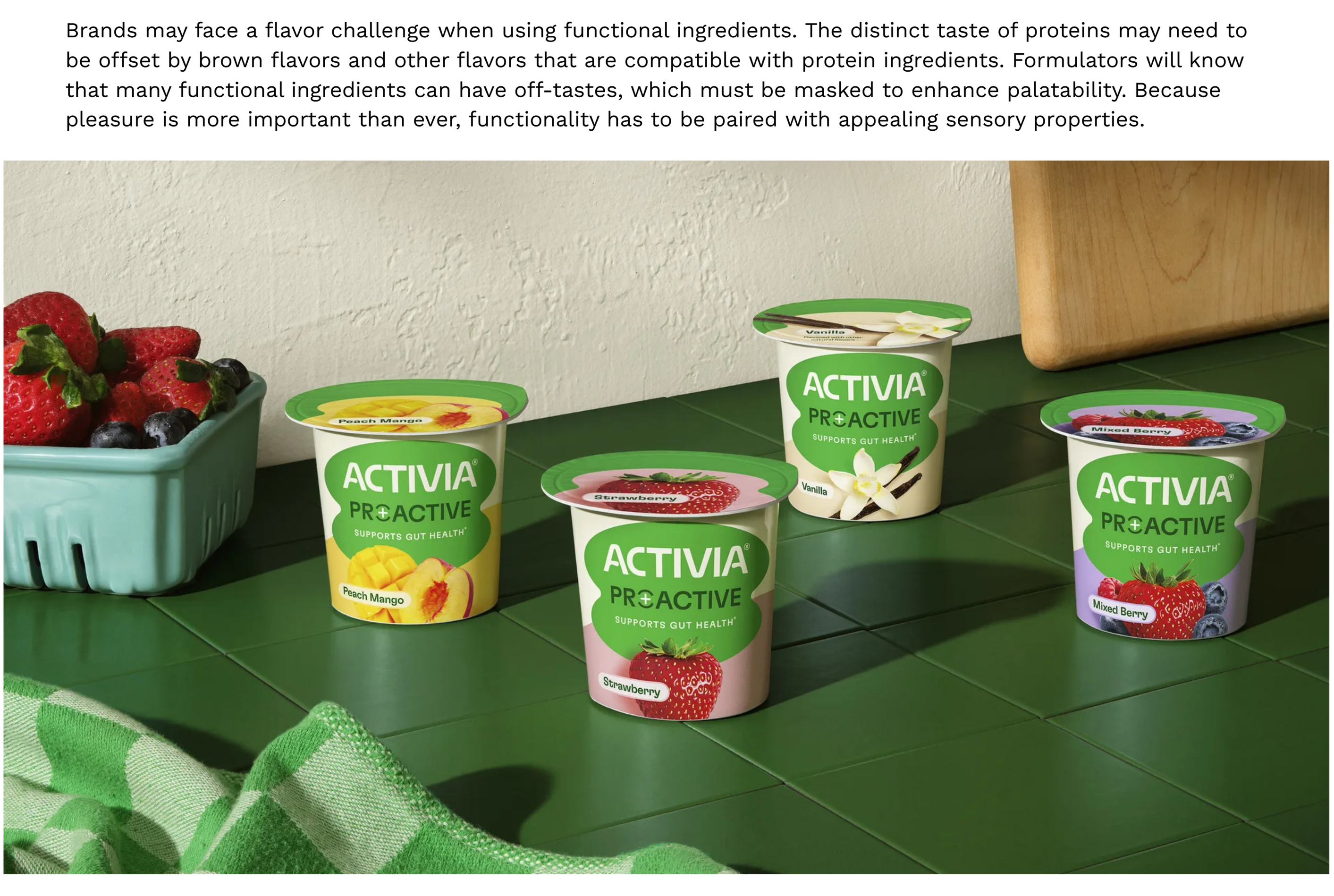
Healthy aging is extremely important to consumers in the US, who worry about both physical and mental health needs as they get older. While consumers agree regarding the importance of exercise and sleep to healthy aging, they also look for a balanced diet, nutritionally rich food and drink choices, and supplements.

Overall "healthy aging" in food and beverage innovation is relatively low. However, Innova has been tracking launches around specific natural nutrients and their benefits, as well as beauty products to maintain youthfulness of the skin.

Functional Ingredients Flex Their Muscle

Consumers want to perform better physically and mentally. They also are taking action to manage their own healthcare. Functional ingredients can help consumers attain their wellness and performance goals while also helping alleviate mental stress. Products that we tagged in the past as "performance nutrition," for example, specialty sports powders, ready-to-drink sports drinks, energy drinks, and sports bars, now are in the mainstream marketplace and show solid five-year growth.

Brands may face a flavor challenge when using functional ingredients. The distinct taste of proteins may need to be offset by brown flavors and other flavors that are compatible with protein ingredients. Formulators will know that many functional ingredients can have off-tastes, which must be masked to enhance palatability. Because pleasure is more important than ever, functionality has to be paired with appealing sensory properties.



New Opportunities

When Innova surveyed consumers about health conditions and issues that are most important to them, we learned that priorities vary based on gender, generation, and lifestyle. Overall, however, weight management and heart health are top physical health concerns and stress and anxiety are top concerns regarding mental health.

Brands can take inspiration from areas of opportunity where there are the greatest gaps between level of concern and product purchasing. These include heart health, stress, anxiety, brain health, healthy aging, and weight management. Consumers clearly are asking for more nutrition related to weight control. We also have tracked launches where products tout multiple health benefits and enable consumers to address more than one health concern with a single product choice.

The focus on health benefits should not overshadow the need for quality. Consumers respond positively to quality ingredients and to narratives that support quality with scientific validation. Quality also can include improved delivery systems to aid in the absorption of functional ingredients.

Natural functional ingredients are important in today's US regulatory environment. Although natural does not carry an official definition, natural ingredients (derived from plants and botanicals) with active nutrients can attract consumers seeking a cleaner approach to precision wellness.

Watch for scientific advances that allow US consumers to pinpoint their nutrition to condition-specific products and ingredients. Consumers can submit fecal samples for analysis of their individual gut health needs or use blood samples or cheek swabs for guidance on individualized nutrient needs. We expect AI to help drive future developments that highlight nutrition shortfalls and customize nutrition strategies.

Looking To the Future

Based on our observations at Supply Side Global 2025, we expect additional trends to emerge. Hero ingredients will be better targeted to allow for precision approaches to wellness rather than a single approach for a broad audience.

Bioactive ingredients will become more prevalent and US companies will have to navigate boundaries between food and beverage ingredients, nutraceuticals, and supplements. It is hard to predict the trajectory of the US regulatory marketplace. We also don't know the future effects of tariffs on ingredient manufacturing and imports.

Lu Ann Williams is Global Insights Director at Innova Market Insights, provider of market research services including the Innova Database. With more than 25 years' experience in the food industry, Lu Ann is a trend expert and frequent public speaker at events worldwide. She leads a team of analysts and works with global clients. Contact her at luann.williams@innovami.com

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Credit: National Restaurant Association

ON-TREND FORM & FLAVOR

National Restaurant Association culinary forecast projects 2026 as the year of smash burgers, global comfort and value.

The National Restaurant Association (NRA) released its 2026 What's Hot Culinary Forecast and highlighted trends set to shape America's menus this year. With insights from hundreds of culinary professionals surveyed in October 2025, the report suggests that nostalgia, comfort and "flavor escapism" will define consumer desires in 2026.

From smash burgers and Caribbean curry bowls to protein-packed meals and low-alcohol drinks, officials say this year's report shows that diners are craving fusions of past trends and modern flavors. Familiar favorites are being reimagined with global influences, while wellness and affordability remain top of mind for consumers.

"Comfort and value are the twin pillars shaping America's menus right now," said Dr. Chad Moutray, chief economist for the National Restaurant Association. "Consumers are seeking meals that deliver joy and familiarity without breaking the bank, and operators are meeting that ask with creative takes on comfort classics and sourcing local ingredients that make healthy choices easy."

In response, restaurants are crafting dishes that deliver comfort and creativity without sacrificing value. Here are NRA's top 10 trends for 2026.

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1. **Local sourcing** – Restaurants are deepening community ties by featuring ingredients from nearby farms and producers, emphasizing freshness, and sustainability.
2. **Comfort foods** – Familiar classics like soups, stews and burgers offer diners a sense of nostalgia and emotional connection.
3. **Value menus and options** – Operators are balancing creativity and cost by delivering satisfying meals that remain affordable for price-conscious diners.
4. **Smash burgers** – Blending retro appeal with customizable, high-flavor twists; this diner staple has reemerged as a social-media favorite.
5. **Clear menu labeling, icons, and cues** – Simple visual indicators help diners make quick, informed choices about ingredients, calories and sustainability.
6. **Allergen-friendly menus** – Restaurants are expanding inclusive options for guests with dietary restrictions—from gluten-free items to nut- and dairy-free dishes.
7. **Global comfort foods** – Chefs are reinterpreting homestyle dishes from around the world, blending authenticity with local influence.
8. **"Cleaner" recipes with fewer additives and dyes** – Consumers are prioritizing ingredient transparency, inspiring operators to include simpler, less-processed options.
9. **Proteins as add-ons** – From smoothie bowls to pancakes, protein is becoming a customizable boost for both taste and nutrition.
10. **Compostable and reusable packaging** – Eco-friendly materials are replacing single-use plastics as restaurants reduce waste and improve sustainability.

At the macro level, NRA says comfort and value remain the ultimate crowd-pleasers, and operators are finding new ways to deliver both through inventive sourcing, menu simplification, and community-minded offerings. These shifts signal a restaurant landscape defined by balance and one that pairs creativity with practicality and ensures that every innovation connects meaningfully with what guests care about most.

"The 2026 forecast highlights a restaurant industry that continues to adapt to changing tastes and economic realities," Moutray added. "It is driven by connection and creativity, bringing fresh energy to classic favorites while celebrating the global flavors that make dining out an experience."

The What's Hot Culinary Forecast is based on a survey of hundreds of culinary professionals conducted in October 2025. Respondents identified leading trends in dishes, beverages, desserts, ingredients, and macro themes for the coming year.

Click here to learn more about the report.

About the National Restaurant Association

Founded in 1919, the National Restaurant Association is the leading business association for the restaurant industry, which comprises more than 1 million restaurant and foodservice outlets and a workforce of 15.7 million employees. Together with 52 State Associations, we are a network of professional organizations dedicated to serving every restaurant through advocacy, education, and food safety.

NEXT ARTICLE

More To Reach For

Retailers' private label "own brands" grow, address on-trend forms and flavors.

Food and beverage processors showcased on-trend forms and flavors at the Private Label Manufacturers Association annual convention.
Credit: Private Label Manufacturers Association

By Glenn Pappalardo

The Private Label Manufacturers Association (PLMA) held its annual North American trade show last November in Chicago. The global event featured nearly 2,000 exhibitors and 14,000 attendees and it demonstrated the segment's on-trend appeal.

Attending PLMA can offer a variety of perspectives on the state of food and beverage (and even broader CPG) as we head into 2026. Among these are the usual conducting of "pulse check" views on major themes and hot trends; spotting unique and innovative products, formats or technologies; and connecting what's seen on floor with broader trends involving today's regulatory and economic landscape.

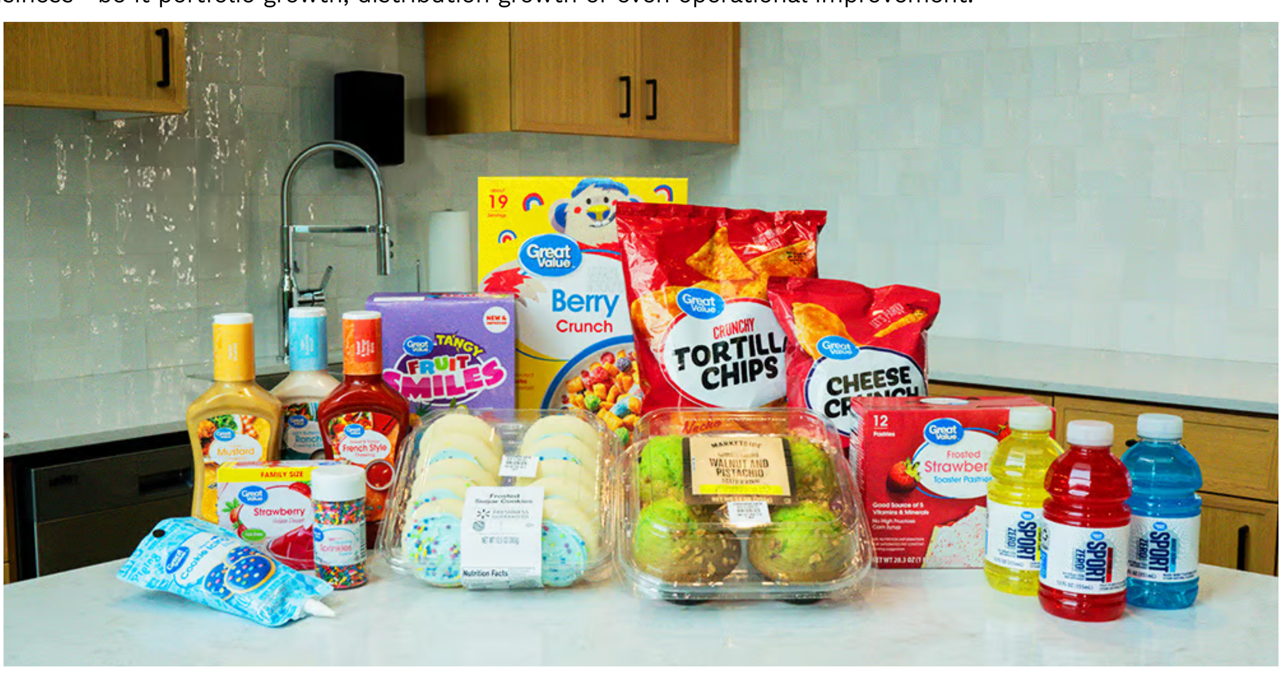
Trends—and Talk

The show did not disappoint across these perspectives. It wasn't hard to miss trending coffee, protein, (and protein coffee), chocolate (including Dubai!), pizza, allergen-free products, international flavors (Korean corn dogs, please), squeeze bottle packaging, superfoods and premium and natural pet products.

There also were noteworthy snack formats including stuffed savory waffles, freeze-dried sweets and snacks, grilling cheese (*not grilled cheese; no bread needed here!)*, cake batter drizzled popcorn and instant ramen-style Italian pasta dishes. Much to my daughter's delight, there also was a "Wicked" themed beverage syrup that is bright green and full of sparkles.

Of course, it's not as easy to spot the impacts of macro issues such as tariffs, supply chain disruption and even MAHA. However, I took time to speak to exhibitors and they privately confirmed strain for all industry participants.

Many exhibitors spoke about the lengths to which they're going to (1) ensure supply, (2) absorb significant cost increases and (3) convert product portfolios to comply with expected future US market conditions. In addition, there are the associated daily costs of time and attention required to simply to keep the train "on the rails." Not surprisingly, they admit that one of the knock-on impacts of so much change is to limit anything "new" within the business—be it portfolio growth, distribution growth or even operational improvement.



Private Label: Rising Tide

There's also a "meta" take-away from PLMA that is perhaps most worthy to unpack. In the history of our industry, it's never been easier to put a "good enough" product into the market.

Let me start and clarify what I mean by "good enough."

When products compete—for space on shelf, for consumer awareness and for share of wallet (and stomach)—they do so across several dimensions. These include their brand and supporting positioning (i.e. the "story" around the product and why it's attractive), their packaging and visual identity, and of course, the physical product itself.

From a table stakes perspective, attributes such as general product-packaging appearance, taste, texture, baseline nutrition and functional benefits are what make products "viable" for consumers. Said differently, these attributes are what lead consumers to view a product as "good enough" for them to consider trying.

So when I say that it's never been easier to put a "good enough" product into the market, what I mean is that we seemingly now have the highest number of potential co-manufacturer and supplier partner options available. And not only are these companies keeping up with ongoing consumer trends and desires, but they also have invested in the supporting capabilities to generate those on-trend products.

As a result, the avenues to entering a category with a reasonably viable offering are numerous, and the overall timeline for doing so is more manageable—for nearly any type of player in the industry.

As a proof point, it's this "rising tide" of external partner expertise that has enabled many retailers to consistently and rapidly elevate the competitiveness of their own store brand portfolios. In turn, that's putting significant pressure on things such as share and pricing across many CPG categories.

There are several factors driving this elevation of the co-manufacturer and supplier environment. These include the increasing availability of international options, as well as a consistent evolution in the sophistication of North American players (brought on in part by new ownership and/or investment).

Focus on the Future

But in the interest of focus, let's instead turn our attention to a different topic. If it's true that it has never been easier to put "good enough" products into market, what does this mean for the food and beverage industry in the coming year(s)?

For me, there are five implications worth calling out.

First, the competitive pressures facing branded category leaders across the store aren't going anywhere and, if anything, are likely to increase.

Larger players historically built "competitive moats" through technical know-how that was supported by investments in proprietary processes and equipment, as well as their distribution muscle. This historic advantage continues to erode.

External players are increasingly proving to be better at "fast-following" hit products and hot trends. They've even found workarounds for established technical barriers (as disputed in the current lawsuit between Smuckers and Aldi around Uncrustables, a format offered by several PLMA booths by the way).

Second, the total potential value of a "hit" innovation will be smaller than it was in the past.

Given the speed and ease with which successful items can be identified, and then reverse engineered and imitated, the window in which a new item can dominate its space is shrinking. This should influence how companies think about the full portfolio of products they seek to innovate, and how they go about doing this (more to come on both of these).

Third, brands looking to deliver more consistently impactful innovation need to sufficiently focus not just on the physical attributes of the product, but on the full suite of innovation success drivers.

It's critical to have a crystal-clear view of your specific, target consumer. Who does your product successfully "do the job for?" Next, it's equally important to effectively communicate why this is the case. Ultimately, creating and maintaining a brand that is credible to deliver this message—may be an even more sustainable source of competitive advantage than what's physically in the box, bottle or pouch.

Fourth, it will be more important for brands to understand the "shape" of their product portfolio, and to balance this shape to deliver their business needs over time.

Not every product (or even product line) in the portfolio plays the same strategic role, and winning portfolios will be those that best deploy products to play these different roles. The goals are both to defend existing territory while successfully expanding into new opportunities.

At the same time, to enable this portfolio balance, the approaches taken for different types of innovation also need to be customized to fit the purpose that particular innovation will serve in the broader portfolio.

In the new world, there's less room for overly cumbersome innovation processes that seek to "de-risk" a launch or "perfect" a product through exhaustive consumer testing or endless rounds of refinement based largely on internal perspective. Such approaches trade an implied risk of failure for an explicit opportunity risk, by taking too long to get products on shelf or diluting product concepts to the point of being milquetoast, in both cases destroying the ultimate ROI of the effort.

Finally, the fifth implication is that smart CPG food and beverage innovators will seek to "get outside themselves" to maximize their external networks of suppliers, co-manufacturers and other relevant service provider contacts.

They must cultivate these networks over time as they would any key internal asset. Given the pace at which the innovation landscape is evolving, no one company can keep up with things all by themselves.

To critically unlock an effective innovation portfolio and process, brand owners must invest the time to identify the external entities who are developing key emerging capabilities, inputs and knowledge. These proactive brand owners need to build productive working relationships with those outside firms. This is particularly true for more expansive, breakthrough innovation efforts, which by their nature are likely to require inputs or capabilities not currently resident inside a company's existing network or organization. After all, to paraphrase an old axiom, "if you can't beat 'em ... work with 'em."

What's Next?

As a branded participant in our industry, there are two ways to interpret a show like PLMA.

Some will choose to approach what they see via a defensive posture, interpreting the increasing capabilities as a threat, and will double down on "fortifying" their own internal assets and processes.

But for others, they will appreciate the meta-takeaway of PLMA for what it is—an ever-expanding opportunity. An opportunity to do more, and better, innovation, and to do it faster and more effectively than ever before. But only if they're willing to develop the mindset and processes to unlock it.

One of these groups will spend the next several years watching the competitive tide rise around the walls they've built, wondering when the flood waters will come rushing in.

Meanwhile, the other will rise with the tide and let it take them to a new level in their innovation and performance.

Glenn Pappalardo is the co-founder and CEO of Integral CPG (https://www.integralcpg.com/) , a boutique consulting firm that unlocks meaningful growth for food and beverage companies through strategy and innovation. He has more than 20 years of industry experience in a variety of consulting and corporate leadership roles, including head of strategy, COO, corporate development and international applications.

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Fruit Sweet

Fruit-derived sweeteners help formulators address demand for "clean," natural ingredients.

"Flavored with fruit" on the label is a promise of healthfulness, natural sweetness, and comfort that resonates with today's consumers. Credit: iStock/thaiview

by David Feder, RDN, Executive Editor–Technical

According to MarkWide Research, "The fruit-based sweeteners market is witnessing rapid growth, fueled by consumer demand for natural and healthier sweetening options. This market presents lucrative opportunities for manufacturers, retailers, and other stakeholders. Key drivers include increasing health awareness, the shift towards clean label products, and the rising prevalence of lifestyle diseases linked to excessive sugar consumption."

Assessments by Dataintelo Consulting Pvt., Ltd. support this trend, forecasting global fruit-based sweetener sales to double to more than USD5 billion by 2032, up from approximately USD2.5 billion in 2023, indicating a CAGR of more than 8%. Popular fruit syrups include those from apples, pears, pomegranates, and other sources. Other trending fruit-derived sweeteners include coconut sugar, carob sweetener, and date sweeteners in the form of pastes, syrups, and dried and granulated formats. Also increasingly favored: sweeteners derived from purées of prunes, guava, figs, raisins, and other dried fruits.

Certain fruit-derived sweeteners work well for reducing sugar and balancing glycemic response. Due to the natural mix of sugars in fruit, the contribution to caramelization and Maillard browning can be easier. Also, residual components, such as naturtal texturants—such as pectin and other fibers—fill functional and volumetric gaps.

Form and Function
Since fruit-derived sweeteners are often more complex in flavor, color, and texture than refined sweeteners, their successful use as substitutes for refined sugars depends on the formulation and format. "Fruit-derived sweeteners are acceptable replacements for sucrose due to the ratio of innate sugars with the mix of fibers and naturally occurring texturizing agents," explains Justin Kanthak, MBA, food scientist, sweetener scientist, and past president of the Research Chefs Assn. "They contribute to the complexity of flavor through the offering of innate functional sugars and other components, such as minerals and flavonoids."

While fruit-derived sweeteners from such sources as carob, dates, coconut, and dried fruits can lower total sugars by providing flavor and body that compensates for sucrose, the relatively high mineral content can alter the flavor profile and, in some formulations, can interfere with volume and texture. "If selecting date sugar, carob sugar, or coconut sugar, it's essential to account for the residual flavor components, such as toasted, herbaceous, woody, fruity, or nutty," says Kanthak.

Fruiting Bodies

New sweeteners and technologies continue to head to market in the effort to help food and beverage makers reduce calories without deviating from the natural flavors and functions of full-calorie sugars. Although not exactly a fruit, fungi was the target of one company specializing in fungi-derived maskers and enhancers. Technologists there have extracted a highly promising sweet protein from the Honey truffle (*Mattirolomyces terfezioides*), a white truffle renowned for having multiple forms of natural sugars and sweet proteins. The company plans to market the ingredient in about a year.

Kanthak notes that, depending on the application, if the sweetness does need a boost, it could come from a high-intensity sweetener (HIS). While many HIS solutions have the disadvantage of imparting bitter or off back notes, lower usage in conjunction with the fruit sweetener will minimize such flavors.

Tropical Treat
Coconut sugar has been gaining significant traction in recent years. Derived from coconut blossom sap—also known as coconut blossom nectar—it has a total caloric load similar to that of pure sucrose, although it is only around 75% sucrose with some free fructose and glucose. Remaining sugars in coconut sugar include *mannose* and the sugar alcohol *inositol*. As with other fruit sweeteners, it has a lower glycemic load than plain sucrose.

Date sugar, a favorite sweetener in Middle Eastern and North African culinary traditions, is enjoying Western success in many on-the-shelf products. It's available both as a syrup and in a dried, granulated format (often containing *maltodextrin*) and is similar to coconut sugar in having a slight caramel-like flavor, light brown color, and a complement of minerals and fibers. Date paste contributes sweetness, as well as binding and texture. Date sugar also has trace amounts of B vitamins. It is best used in bakery items and confections, as it does not dissolve well in beverages.

Sweetness for the Ages
Carob sweetener is appearing in an increasing number of products, including beverages. A natural, clean alternative to pure sucrose, it delivers the same level of sweetness as table sugar, without the metabolic spike. Carob sweetener also has browning and caramelization behavior identical to that of pure sucrose, and it imparts no off flavor notes.

Baked goods can still rely on carob sweetener for structure, confections can maintain a chewy bite, and in beverage formulations, it helps build the overall balance of the flavors in the finished product.

Another advantage is that carob sweetener has a low glycemic index—as low as 4.2—due to its content of the natural insulin-mimetic compound *D-pinitol*. Pinitol has demonstrated an ability to support blood sugar management and thus overall metabolic wellness.

The flavored syrup market is set to reach USD89.48 billion by 2034, expanding at a 5.2% CAGR.

—by Fact.MR

"When it comes to sweetening beverages, carob offers a naturally smarter alternative to sugar," agrees Eli Faraggi, co-founder and CEO of Innobev, Ltd. Innobev was one of the first beverage makers to turn to carob sweetener for its WakeUp! and BioLift beverages, which are designed to support focus and concentration without caffeine.

"Carob's naturally sweet profile provides a pleasant flavor enhancement while requiring far less added sugar to achieve the same effect," notes Faraggi. "This means that drinks sweetened with carob can deliver the same satisfying sweetness, but with fewer calories, making them a better choice for anyone looking to reduce overall sugar intake without sacrificing taste."

Unlike artificial sweeteners, carob is a whole food ingredient derived from the pods of the Mediterranean carob tree, making it both familiar and clean-label friendly. Beyond its calorie advantage, carob brings added nutritional value that traditional sugar simply cannot match. It contains beneficial *polyphenols*, dietary fiber, and essential minerals, in addition to the aforementioned low glycemic index.

"These qualities make carob particularly appealing for persons managing blood sugar levels or seeking steady, sustained energy throughout the day," adds Faraggi. "The combination of its natural sweetness, nutritional benefits, and metabolic support explains why carob is emerging as a valuable ingredient for beverage brands seeking to balance great flavor with health-conscious functionality."

From an ecologic point of view, the carob tree—one of the oldest known cultivated food plants and the subject of Biblical praise—is climate-resilient, has very high atmospheric carbon capture and storage capabilities, consumes very little water, is tolerant of high heat, and requires little labor.

In the Fruit Sweetener Pipeline

Two Israeli companies have independently developed similar technologies to convert a portion of the sugar molecules in juices and fruit purées into short-chain fibers. These retain some of the sweetness while lowering the total sugar calories significantly. Another company has turned to biomolecular agriculture and genetics and teased watermelons into producing a *mogroside* compound like the ones in monkfruit. The result is an extract that is some 250 times as sweet as sucrose and reportedly performs better than monkfruit mogrosides.

True Fruit Value
While fruit-derived sweeteners offer only modest caloric reduction in foods and beverages, their multiple advantages combine with their significant consumer appeal to make them excellent candidates for clean-label, sustainable, and health-halo formulations. Many fruit sweeteners are higher in *monosaccharides*, especially glucose, which helps them control browning in bakery products. In purée form, they can contribute and maintain moistness and surface shine. They also have high humectancy and can help reduce staling in cookies and other baked goods, extending shelf life.

In sauces, fillings, and batters, fruit sweeteners add viscosity, body, and mouthfeel. Some fruit sweeteners also have masking properties. For example, apple or pear concentrate can balance acidity in fermented beverages, and grape concentrate has been shown to enhance cocoa notes in chocolate formulations.

Date, carob, raisin, fig, and coconut sweeteners are best used in baked goods, as they can add brown color notes. Berry-based concentrates or powders can reinforce red and purple colors, supporting or replacing artificial colorants in some products. This is especially important considering the current push to eliminate artificial colors from foods and beverages.

Berry and stone fruit sweeteners are typically available as purées, pulps, or juice concentrates. In addition to their natural components of fructose, glucose, and sucrose, they deliver fruit volatiles to enhance flavor, plus minerals and trace *phytonutrients*. Apple, pear, and white grape concentrates are especially common due to their neutral flavor profile. They also contain native pectin, imparting body, viscosity, and visual appeal. They're especially well-suited to applications such as bars, condiments, and dairy or dairy analog products.

Spray-dried fruit powders also are widely available and allow formulators to add sweetness with minimal water activity impact. They also can contribute natural color, and some can permit antioxidant claims, depending on their amount in the formulation and certain regulations regarding added sugars.

Once considered niche ingredients, sweeteners sourced from apples, grapes, dates, monkfruit, and other fruits are now central to innovation strategies across beverages, snacks, dairy alternatives, and bakery applications. Their rise is propelled by three converging forces: regulatory pressure on added sugars, increased scrutiny of artificial sweeteners, and a more sophisticated consumer understanding of ingredient sourcing.

As consumers continue shifting toward "cleaner," minimally processed ingredients, product developers are discovering the value of fruit-derived sweeteners as formulation tools that balance taste, functionality, and label appeal.

David Feder, RDN, has been a food, nutrition, and health journalist for 26 years. In spite of an academic background that began with psychology and biblical archaeology, David cut his teeth as a celebrated chef, helping pioneer haute-health and fusion cuisines in high-end restaurants and hotels. He then segued into nutrition science, becoming a registered dietitian while completing research and coursework toward a PhD in nutrition biochemistry at the University of Texas at Austin, also teaching food science and nutrition courses.

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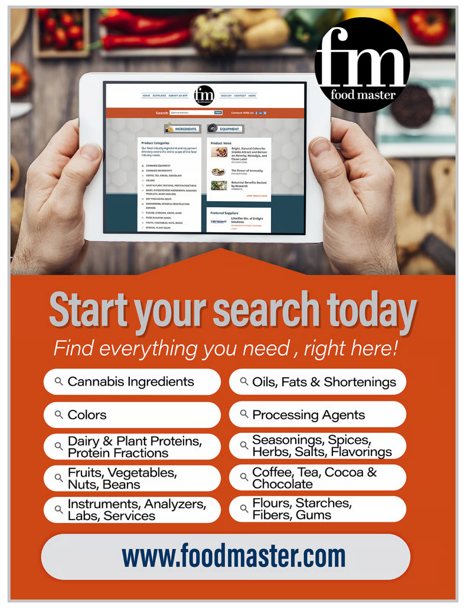

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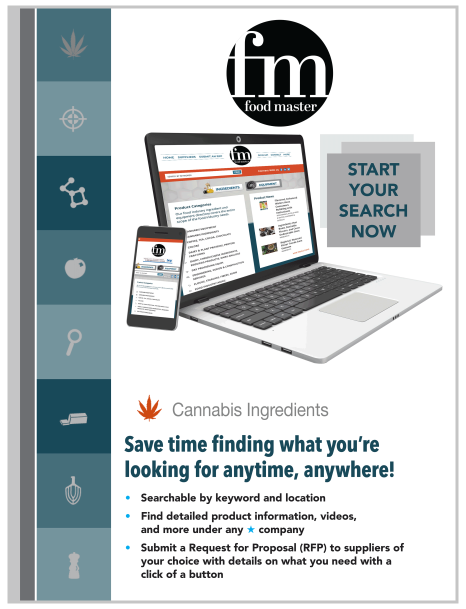

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