

Food Innovation Quarterly

WINTER 2023

Breakfast 2.0

The newfound palette of morning emotions

Pink Passion

Rosé on the rise as millennials dictate new wine codes

The Baking Fervour

How COVID transformed bread consumers into bakers

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Rankings & Analytics **p. 41**



Food as Emodities

Rethinking the Future of Food

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Every year, the Food Innovation Quarterly in partnership with ESSEC Business School invites world's leading food scholars, chefs, scientists and artists representing academia, NGOs, regulatory bodies, and food organizations, to redefine the scope of food and the meaning of food innovation through a series of seminars and workshops.

The Food Innovation Quarterly addresses the future of food across the short and longer term, looking at challenges and novel solutions for the society. We also make recommendations on research, innovation, education, practices and policy for a sustainable, healthy and culturally diverse future of food.

Contributors to this Issue:

Dr. Richard C. Delerins

Editor-in-chief

Arunima Kumar

Executive Editor, Food Innovation Quarterly, France

Sara Antoniotti & Laura Oppici

Bocconi University, Milano, Italy

Ismet Demir

CEO & Founder, Brew Mood Coffee, Izmir, Turkey

Vanessa Kimbell

Founder, The Sourdough School, Northampton, UK

Diana Mahfouz & Audrey Randazzo

ESSEC Business School, Paris

Maria Pocovi

Founder Emotion Research Lab, Valencia, Spain

Cyprien Rose

Independent Journalist, Paris

Design & production

Typoman

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KEYNOTE SPEAKERS



Pr. Ganesh BAGLER

Associate Professor, IIT Delhi

**The Science of
Computational Gastronomy.
The Case of Indian Cuisines**



Anne-Laure BLOCH

Head of Buying & Offer
Grocery Food and Beverage
GALERIES LAFAYETTE

**How Food & the New Food Culture
Reshape the Future
of Global Department Stores**



Richard RAMOS

Député MODEM/Majorité Présidentielle

**L'Alimentation de demain :
de la fourchette à la fourche.
La perspective du législateur**



Chef Loïc DABLÉ

**When Africa Awakes:
the Revival of African cuisines**

Food Innovation Quarterly

In 1931, in a prophetic article entitled 'Fifty Years Hence', Winston Churchill imagines our future lifestyles: he depicts a society overrun with televisions and 'wireless telephones'. A world where factory farming, industrial breeding have disappeared because we now know how to 'grow' the most useful parts of the animals separately, where microbes and bacteria are selected and cultivated like plants and where new 'synthetic' foods are consumed for the greatest pleasure of all. But Churchill refused to believe that we be satisfied with a few pills as a meal at our dinner table.

Eating is not so much a natural (nutritional) phenomenon than a complex cultural construction, rebellious to any generalization. The act of eating is first of all a fact of society. It is a whole phenomenon. From the genome to the plate, from deep learning algorithms to 'cognitive cuisine', from proliferation of street food to the success of a multitude of television series, we are witnessing an unprecedented swarming of initiatives, experiments and new concepts. An inventiveness driven by scientific, technological, logistical and commercial advances is profoundly changing our eating habits and, more generally, our consumption patterns.

At a time when innovation is nesting in all the interstices of our food practices, traditional frameworks of analysis are now outdated. Understanding the evolution of our plates requires new 'categories of analyses' of our lifestyles and consumption patterns. The Food Innovation Quarterly presents these new categories which allow us to understand the transformations of our eating habits. Today,

food innovations, whether they are individual or collective, public or entrepreneurial, are emerging and unfolding within complex ecosystems where everything is intertwined-geographical scales, the local and the global, life sciences and social sciences.

Understanding the transformations of our food behaviors is to uncover the dynamics of these ecosystems, their logic, their organization, their geography. On a global scale, food ecosystems are interconnected and form a worldwide geographic network, of which the 'Alpha cities' are the main nodes. Hyperconnected metropolises are both incubators & vectors for the dissemination and acceleration of food innovations and practices. How else can we explain the meteoric rise of a drink like 'Bubble Tea' from Taipei, which, in just a few months, has seduced consumers in San Francisco, Paris or London?

To keep track of all the innovations around the world, the **Food Innovation Quarterly** relies on an international network of scholars, who each month identify, classify and assess new food products and services from Alpha cities. Emerging 'food scripts' are analyzed, new players identified, innovations integrated into the **Food Analytics** digital platform and then screened under the microscope of our algorithms. Every quarter, a ranking of the best food innovations is presented, offering an analytical and predictive vision of the current transformations of our eating habits and more generally of the future of food.

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BREAKFAST 2.0

The newfound palette of morning emotions

by **Diana Mahfouz & Audrey Randazzo**

Simply the first meal of the day, for some, breakfast makes them want to jump out of bed in the morning. For others, it gets lost in the busy rhythm of life. But has the significance of breakfast transformed throughout its passage from generation to generation?

Finally, there's the **American breakfast** which has undergone various developments over the years. It started with a focus on energy and health with the iconic Kellogg's cornflakes, 'the breakfast of champions'. Orange juice was and still is an indispensable part of the meal. Eventually the peanut butter craze arrived hence birthing the famous PB&J (peanut butter and jelly/jam) sandwich. The classics like pancakes and waffles remain in the mix. Typically taken at home, in under 30 minutes, with family, the American breakfast lies somewhere in between the French simplicity and Mediterranean diversity.

Therefore, traditionally, the breakfast moment holds a unique significance in different cultures and is the result of an amalgamation of centuries of practices. However, as geographical boundaries increasingly disappear, the cultural divide is transitioning into a generational one. Millennials, with their faster pace of life, are turning breakfast into a 'me-time' activity. It is frequently shared with loved ones virtually but only occasionally in person. Thus, the crucial role portrayed by social media in their lives makes it the perfect place to get insights into 'Generation Me! Me! Me!'s breakfast consumption habits. Labelled as the most misunderstood generation of all time, millennials are those born between 1981 and early 2000s. Like any other generation, they have priorities, but these have evolved: traditional signals of adulthood, 'success markers', such as having kids and owning homes, are not their top priority. Instead, they are much more interested in traveling and discovering the world. They want to make a positive impact in their communities before making families and they value spending their money more ethically.



The American Breakfast: A Vintage Ad by Kellogg's from the 1920s 'We've found the secret of happy breakfasts'



The English Breakfast



The Oslo Breakfast



Symmetry Breakfast's aesthetically appealing breakfasts

This generation spends more money eating out, and less time preparing food at home: they search for convenience over food preparation, presentation, and clean-up: 'millennial preferences for convenience may be a principal characteristic of this generation'. More than three-quarters of millennials buy breakfast food or drinks, and their away-from-home breakfast consumption is not slowing down.

Instagram breakfast accounts are a crowd favourite among the millennials, indicating their curiosity towards learning what their peers start their day with. However, it is not simply about getting inspiration from these accounts for their own breakfasts but also about supporting what these accounts stand for. *Symmetry Breakfast*, Michael Zee's blog and Instagram account with 710k followers, is where he documents the diverse breakfast plates he makes for his boyfriend and himself which are identical in every way. Following Michael is not just about looking at his aesthetically mind-blowing creations or replicating them, but also about being an LGBTQ+ ally.

Smoothie Bowls, is a collection of the most stunning looking smoothie bowls from around the internet where its 525k followers go for their early 'morning musings', 'health goals' or even 'good vibes'.

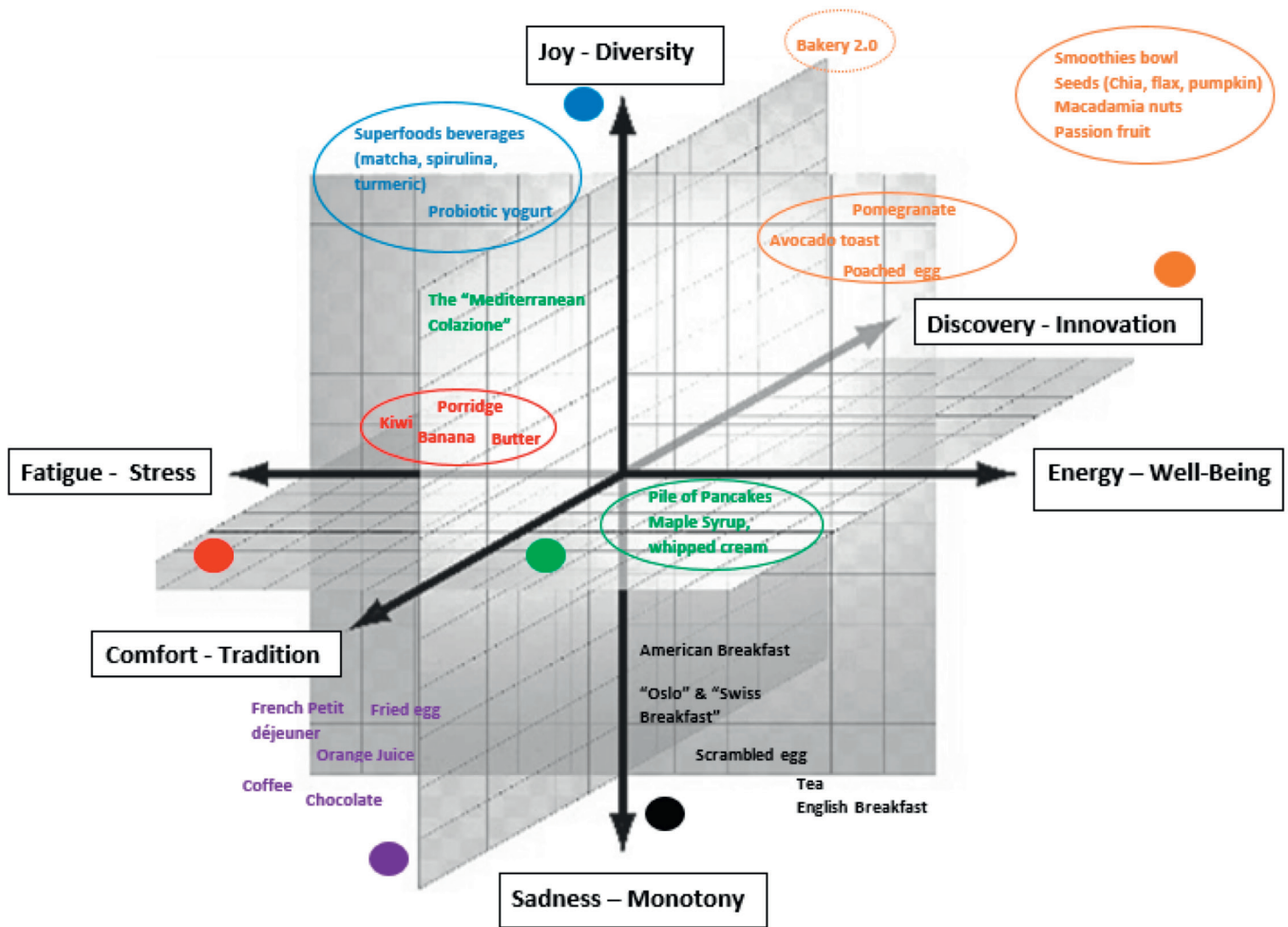
Hashtags such as *#breakfastporn*, *#yolkporn* suggest that for this generation, food is no longer just a source of energy but an object of fantasy. Not only should the food be beautifully presented and aesthetically pleasing but also offer an overall sensory experience with dripping yolks and crackling toasts.

Health is at the forefront of their choices as suggested by the trending *#healthybreakfast* which has over 6.7 million posts under it. The rising popularity of professionals like the Culinary Scientist, Jessica Gavin (69K followers) and Erin, The Food Science Babe (224K followers) indicates the value Millennials place in health & nutrition facts. As the body of evidence linking high protein to more satiety is growing, millennials are already ahead of the curve. Having made a significant departure from their predecessor's breakfast habits which were primarily focused on processed sugary carbohydrates often disguised as cereal, millennials prefer protein rich foods like a yogurt bowl, energy bars or good old eggs to start their day. Superfoods like acai, curcuma, spirulina etc. also recurrently appear on café menus to cater to this clientele.

The breakfast/brunch menus of popular coffee hotspots always have a few vegetarian and vegan breakfast options indicating the high demand for these products by the generation. The popularity of food bloggers such as 'Deliciously Ella', which started off as a vegan food blog and has blown up into a full-fledged eatery in the UK; and the hashtag *#veganbreakfast* can be attributed to a rising consumption of plant-based foods, mostly for environmental reasons. This generation is more conscious and vocal about the impact of their dietary choices on the environment in comparison to their predecessors as the climate issue takes center stage in the mainstream communication. Millennials are willing to pay more for ethically sourced food and the ones that are not ready for a full-time commitment to a vegan or vegetarian diet are still keen to integrate more plant-based meals in their routines. Breakfast makes it easy to do so.

This globalized generation isn't bound by geographical restrictions. Access to recipe aggregators and platforms such as 'I am a Food Blog', 'Breakfast Criminals', 'Tastemade', 'Food52', 'The Feed Feed,' and cooking channels on YouTube and TikTok with creators and contributors from all over the world makes the breakfast of this generation pretty diverse.

Millennials take on average 39 minutes deciding what to eat for breakfast: it's the specifics that take time: wholegrain or brown bread, almond or goats' milk, smashed avocado or sliced eggs? They're looking for global food and ethnic food from different parts of the world appeals to them. It's breakfast burritos on Monday and



A 3D mapping of breakfast items based on the Emotions Axis, The Energy Axis & The Tradition/Innovation Axis

Shakshuka on Tuesday and maybe plain old overnight oats for Wednesday. They like to try new flavours, textures, toppings and unexpected combinations. Food is seen as an opportunity for exploration.

Millennials try an average of 46 new foods per year. With an affinity for the immediate, they look for products that are practical, quick and easy to prepare. A heightened 'Sense of Self' makes food a mode of self-expression through which they can showcase different facets of their personality. Therefore, the most intriguing characteristic of the generation from a breakfast perspective is this **Threefold Individualization**: eating breakfast that is unique in its formulation, consumed in a unique moment and mostly consumed alone.

Thus far, a singular typical millennial breakfast cannot be defined. The breakfast habits, however, can be classified into more actionable clusters which help in grasping the breakfast needs of the generation with greater precision.

Using the above insights, a few recurring global millennial breakfast items have been mapped on a 3-dimensional graph with the following 3 axis:

The Emotions Axis, developed by studying emoticons, words, texts expressed towards breakfast, consists of Joy on one end and Sadness on the other. While Joy is tied to diversity in formulation, Sadness is tied to monotony.

The Energy Axis, consisting of Fatigue/Stress on one end and Energy/Well-Being on the other because we eat to go from one state to the other.

Tradition/Innovation Axis, with Discovery/Innovation on one end and Comfort/Tradition on the other, assessing the inventiveness of the dish in question.

Along with the 5 classic breakfasts (Famous Five), common millennial breakfast items have been considered for the analysis. These include: Poached eggs, scrambled eggs, avocado toast, pancakes, various fruits, superfood beverages, porridge, coffee, tea and so on.

Into the Clusters

With respect to the three dimensions, clusters have been created by grouping closely mapped breakfast items together. The Famous Five classic breakfasts, as expected, are oriented towards monotony, tradition and comfort whereas the new clusters identified are more towards innovation and diversity. The favoured culinary technique identified is 'assembly', like in the creation of smoothie bowls or porridge or toasts. Thus, overall, five existing clusters and one potential cluster have been derived. The clusters are named according to their composition and the emotion emanating from them.

Superfood beverages and probiotic yogurts make the '**Boost My Health**' cluster. These foods are often consumed in a state of fatigue or stress to achieve energy, they are diverse in formulation in terms of the flavour variety available and though centuries old in their niche markets, they are new and innovative for the global consumer.

With endless possibilities, at the height of diversity, is the '**Trendy Catchy**' cluster including smoothie bowls, seeds, macadamia nuts, passion fruit. It is also positioned at the top on the discovery/innovation axis because these foods have only recently become mainstream thanks to their visibility on social media. The cluster name is chosen to reflect this eye-catchiness and popularity.

Avocado toast, pomegranate and poached eggs form the '**Rose & Green**' cluster, named so to reflect the colour of a ripe avocado, a dripping yolk and the vibrant fruit as the innovative topping. This cluster, thus, falls at the centre of diversity, innovation and well-being. It is international, tasty and healthy, thus seen in regular rotations in the millennial morning routine.

A pile of pancakes, maple syrup, whipped cream are all the foods that signify indulgence for the millennials and hence the fourth cluster is called '**Guilty Pleasure**'. These foods are all about childhood and nostalgia, placing the cluster closer to comfort and tradition. They can be made diverse by mixing up the toppings but inherently it's a monotonous classic thus positioning it in the middle of all the axes.

'**Ultimate Winter Tradition**' is composed of porridge, kiwi, banana and all types of nut-butters, all painting a picture of a cozy winter morning. This is why it is positioned at the intersection of fatigue, comfort and diversity. Diversity because you can put whatever you want in your porridge, and express your personality.

'**Bakery 2.0**' is the final cluster which is just beginning to define itself. With dirty bread and dirty matcha, the latest bakery crazes in Asia, this experimental and sensory approach to bakery is what piques the interest of millennials.

Thus, grouping the main breakfast foods of millennials from around the world into more comprehensible segments, these clusters are reflective of their unique threefold individualization characteristic. However, could it be that millennials are reinventing breakfast? It is obviously not a new concept to feed yourself first thing in the morning but it is definitely new to assign a contemporary meaning to this moment. No longer just a meal, breakfast surely is a palette of creativity for this generation. It's a blank canvas, an opportunity to decide how their day will be and who they choose to be today with what they decide to put on their platter (or palm, for the busy bees) in the morning. They choose the meals depending on their emotions, their state of mind, their feelings, and their guts. Hence, there are millions of possible combinations, and each combination can be attached to the identified clusters in order to better define the consumers.

Breakfast 2.0 is definitely a reinvention more than it is a sequel, opening new possibilities for creativity and subsequently for marketing. The consumer demands a 'show' and the Food & Beverage industry is totally here to 'play' their part.

This article is adapted from *Breakfast 2.0. The Millennial's way of eating breakfast* by **Diana Mahfouz, Audrey Randazzo, Juan Han**. (Research Paper, Understanding the Food Consumer in the 21st century, ESSEC Business School, 2020).



'Guilty Pleasure'



'Rose & Green'



'Bakery 2.0'



'Boost my Health'



'Trendy Catchy'



'Ultimate Winter Tradition'





PINK PASSION

Rosé on the rise as millennials dictate new wine codes

by **Richard C. Delerins, PhD**

Every July in New York City, thousands of partygoers gather on the lawns of Randall's Island Park for a huge 'Pinknic'. A regular event since 2016, the two-day festival brings together foodies, musicians, chefs and more, all dedicated to celebrating the summer with a fresh glass of rosé wine in hand. 'Save water, drink rosé', banners read, and the participants do.

Every July in New York City, thousands of partygoers gather on the lawns of Randall's Island Park for a huge 'Pinknic'. A regular event since 2016, the two day festival brings together foodies, musicians, chefs and more, all dedicated to celebrating the summer with a fresh glass of rosé wine in hand. 'Save water, drink rosé', banners read, and the participants do.

Not just a New York phenomenon, rosé has found admirers across the United States, and it's official: The second Saturday in June is National Rosé Day. Once an afternoon afterthought, rosé has become a red-white-and-blue favorite: In just a few years, Americans have become the second-largest consumers of rosé in the world – after the French.

In 2017 alone, rosé sales in the United States jumped 53% and the trend continues, partly driven by millennials. One power couple that was way ahead of the curve was Brad Pitt and Angelina Jolie. While they've since divorced, in 2011 the two rosé lovers found common cause and bought the Domaine Miraval in France's Var region. They continue to jointly own the chateau and vineyard, which produces 2 million bottles of rosé a year, and it's anything but plonk. At a June 2019 charity auction in Nice, a magnum of Muse de Miraval was snapped up for 2,600 euros, a record

Once dismissed, now cherished

How can this global success be explained, and what does the sudden passion for rosé reveal?

Once upon a time, rosé wine was regarded as second-rate, and not even worthy of the interest of oenologists. Even as late as the 1980s, it still wasn't considered a 'serious' wine. This is a consequence of its modest origins, and a series of cultural contributions and transitions.

In antiquity, the Phoenicians brought techniques for making a light-bodied wine



The rosé wine of Chateau de Miraval, owned by Angelina Jolie and Brad Pitt (2015).

to Marseille. Under the Roman Empire, it was known as *vinum clarum* (clear wine) in Latin which spread to Bordeaux, still a major wine-growing region. Bordeaux wine began to flow north to England. Initially called *clairret*, it became known as claret and scored its first international success, becoming the most consumed wine in Britain until the 19th century.



The Peasant Meal, Louis Le Nain (1642). A glass of rosé wine is at the center of the image.

Another reason that rosé may have had a hard time getting respect is that it never received the monastic imprimatur, authorization given by the Catholic Church, nor was it ever 'consecrated' to serve as sacramental wine. Rosé therefore was absent from the liturgy and the Eucharist. Indeed, sacramental wine is traditionally red, by analogy with the blood of Christ. The Church saw *vinum clarum* as a profane wine, and its consumption was not imbued with Christian symbolism, nor attached to any particular table manner or ceremony.

Rosé thus became a popular beverage, almost pagan, and acquired values in opposition to those of red and white wine, which were associated with the nobility and clergy. In the 17th century, when Louis Le Nain painted *Peasant Meal* (1642), the characters in the painting conspicuously drank a glass of 'clear wine' or rosé.

The 'codes' of rosé wine

Today, the codes of rosé wine transcribe these classic oppositions in consumption patterns. How rosé wine is perceived and enjoyed today is, in a sense, a direct result of this long and ever so slightly disreputable history. Rosé celebrates youth, the present, the joy of the moment. Despite the high prices that some bottles can fetch, it's anything but snobbish. Rosé is free from tradition and can be enjoyed cool or cold, with or without ice. By comparison, red wine is traditionally decanted and "chamber": allowed to breath and warm up slowly to room temperature.

Rosé wine / Red wine

profane / sacred
commoners / nobles, clergy
youth / maturity
new / old
simple / complex

Codes of consumption

cool / snobby
innovation / tradition
present / nostalgia
outdoors / indoors
street / table

Because rosé breaks free from the traditional codes of French wine, it delights millennials all over the world. New 'food scripts', new modes of consumption are emerging, defined by a true freedom. Rosé wine can be enjoyed during meals or not, at home or outside, at a picnic or in a café. It can be mixed into cocktails, with or without alcohol. It has jumped out of the traditional glass bottle and can be packaged in all forms – even a soda can. Hello Kitty, the Japanese pop-culture icon, has teamed up with an Italian winery to create a sparkling rosé, Château Kitty.

*'If rosé wine was a software,
it would be open source'*

If rosé wine was a software, it would be open source. Everyone or every culture can appropriate and transform the consumption of rosé in their own way. Marc Perrin, who was a long-time winemaker in California, notes: 'When cuisine merges Asian, European, South American influences, rosé wine is able to combine with all these types of flavors.'

More than a color, pink is an emotion

There is more. The success of rosé wine owes much to its rosy tone. What is it about? Colors have a cultural function that varies according to time and cultures. Blue, for example, has long been depreciated in the West, absent from the liturgy until the 11th century. Everything changed when blue became associated with the Virgin Mary and the blue azure 'fleur de Lys' of the coat of arms of the King of France in the middle of the 12th century.

Today, we have forgotten that the word rose in its original meaning does not designate a color but the flower - from the Latin *rosa*. In French, it was only at the beginning of the 19th century, that the word *rose* really began to be designated as a color. The dictionary of the Académie Française ignored it completely until its 1835 edition.

The English language has kept the distinction between rose and pink. In French, until the end of the 18th century, the 'pink' color was once known as *incarnat*: a flesh-colored hue, the complexion of young, healthy skin. *Incarnat* is the 'color of fresh flesh & ruddy' (Encyclopedia Diderot & d'Alembert). More generally, *incarnat* designated a group of colors between pink and red-orange, recalling the complexion of healthy people, fresh cheeks, blushing under the effect of an emotion.

The 1759 portrait of Madame de Pompadour by François Boucher is one of the most beautiful examples, richly embodying all of these themes.



The portrait of Madame de Pompadour, by François Boucher (1759), is a majestic celebration of the color rose.

Surfing the pink wave

The pink we see today has taken up these historical meanings and aligned them with the values of the millennials: It embodies spontaneity, freshness, insouciance, individual freedom. It signals the importance of emotions, well-being and health. This is made explicit by one of the terms for rosé, blush wine – to become red/pink with emotion.

Today rosé wine is surfing on this wave of pink. Nothing escapes it: food, fashion, design, cosmetics, even politics. Rosé wine, 'ruby chocolate', pink salt from the Himalayas. In October 2016, the site Fashionista featured an article titled: '61 reasons why you will probably, definitely wear pink next spring'. They were right on the money, as Gucci, Balenciaga and Calvin Klein all dedicated their spring-summer 2017 collections to the color.



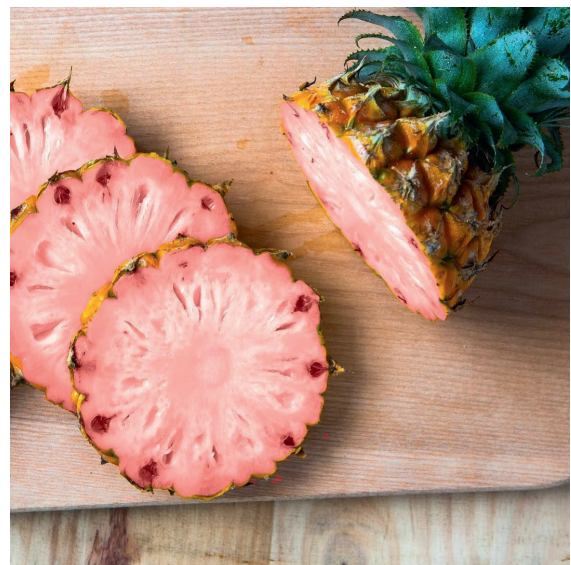
Women proudly wear pussyhats on a flight to demonstrate in Washington, DC (2017).

Welcome to millennial pink

There's even a new pink, millennial pink – neither male nor female, it's gender fluid. It's also an affirmative, self-assertive color, as embodied during the 2017 Women's March protests that took place across the United States in response to the election of Donald Trump.

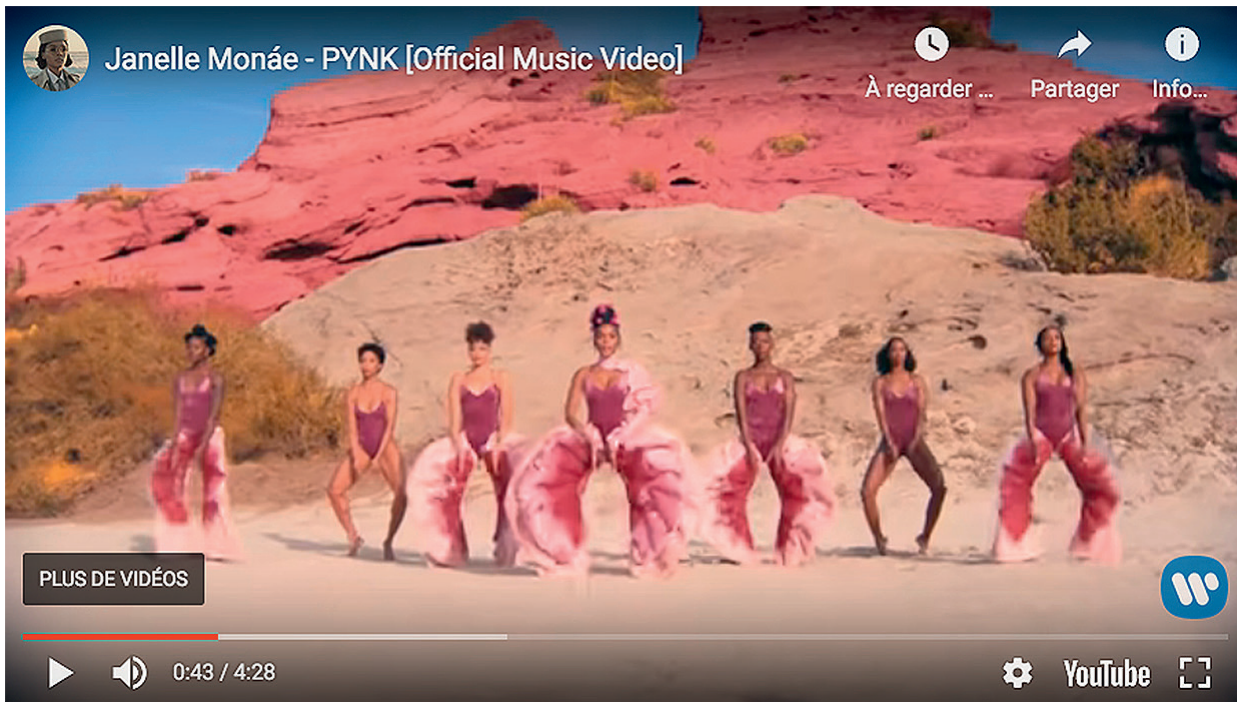
American artist and singer Janelle Monáe, muse of millennials, sees pink as a source of life, the origin of the world and its future. The video and lyrics of her song 'Pynk', from the album Dirty Computer (2018), express the sensibility of our time on the themes of incarnate pink: youth, health, emotion, interiority.

*Pink like the paradise found
Pink when you're blushing inside, baby
Pink is the truth you can't hide, maybe...
... Pink like the skin that's under, baby*



Pink pineapple

When the album was released, a cocktail called 'Pynk' was created in Los Angeles. The recipe: rosé, Aperol, gin and grapefruit juice – a perfect way to celebrate summer.



Arrival of Lady Gaga at the May 2019 gala at the Metropolitan Museum of Art, New York.





THE BAKING FERVOUR

How COVID transformed bread consumers into bakers

by **Sara Antoniotti & Laura Oppici**

The 2020 lockdown experience has revived the practice of baking homemade bread in France and Italy. Inspired by new motivations for baking, the French and Italians are developing a more comprehensive understanding of bread: not just food for the body, but also for the mind, not only for convivial occasions, but increasingly linked with the inner dimension of the individual. This new perception of bread is likely to drive future innovations in the leavened products sector, and to open the doors to novel concepts of bakery.

There is no relationship that can entirely avoid changes, not even the profound bond which connects the French and Italians with bread, a pillar in the Mediterranean diet and in their culinary cultures. In France and Italy bread consumption has decreased by three times compared to the 1950s, accelerated by a wave of carbo-phobia that considers carbohydrates inconsistent with a healthy lifestyle. But in 2020, this evolving scenario was suddenly shaken by the Covid-19 pandemic, which forced everyone to rethink priorities, routines and eating habits. Caught by the need for security and familiarity in times of concern, as well as by an unexpected amount of free time due to social restrictions, bread seemed to reconquer the protagonist's role on the tables of French and Italians. They seemed to instinctively turn to their deepest identity roots: rediscovering bread through the practice of baking, an activity which ancestrally distinguishes human beings as such.

Between March 2020, the beginning of the first lockdown and April 2021, the return to a relative normalcy, the French and Italian consumers spawned and embraced changes in the significance of bread; changes which would percolate to consumers throughout the world and ignite new strides in the world of baking.

‘casa’ etc. were chosen to study the consumers’ inclinations. A peak of interest for the topic was registered from March to May 2020, when the volume of searches made in Italy and France for the local keywords skyrocketed.

Numbers returned to pre-pandemic levels with the reopening of out-of-home activities in June, and then reincreased in October-November, with a second lockdown in both countries. But what is most interesting is how, compared to the previous year, the conversation about bread became significantly more connected with the practice of baking. Looking at the adjoining table reveals that keywords such as ‘home’, ‘recipe’, kitchen tools like ‘thermomix’ and ‘machine’, ingredients like ‘flour’ and ‘sourdough’ appeared in the top 10 topics and queries linked to ‘bread’ for the period March 2020 - March 2021, substituting words such as ‘calories’ and ‘toaster’.

Hence, although the baking phenomenon might soon lose buzz with a return to normal social life conditions, it is reasonable to predict that the proactive approach through which people intensively experienced bread in 2020 has changed their perception of this timeless product.

	Related Topics (by relevance) Users searching for the term also searched for these topics		Related Queries (by relevance) Users searching for the term also searched for these queries	
	1 Mar 19 - 29 Feb 20	1 Mar 20 - 28 Feb 21	1 Mar 19 - 29 Feb 20	1 Mar 20 - 28 Feb 21
Pain (FR)	<ol style="list-style-type: none"> Bread Recipe French toast Gingerbread Pain (la douleur) Toaster Pain au chocolat Bread Machine Caloric Bakery 	<ol style="list-style-type: none"> Bread Recipe French toast Gingerbread Hamburger Bread machine Thermomix Pain au chocolat Machine Flour 	<ol style="list-style-type: none"> Pain recette Recette Le pain Pain perdu Pain de mie Recette de pain Pain maison Pain chocolat Grille pain Pain au chocolat 	<ol style="list-style-type: none"> Pain recette Pain maison Le pain Pain perdie Recette de pain Pain de mie Pain thermomix Faire du pain Pain burger Grille pain
About baking*	2	4 (+100%)	4	6 (+50%)
Pane (IT)	<ol style="list-style-type: none"> Bread Recipe Yeast Calorie Machine Flour Oven Whole wheat bread Rye bread Pane carasau 	<ol style="list-style-type: none"> Bread House Recipe Yeast Benedetta Rossi Flour Sourdough Dough Thermomix Machine 	<ol style="list-style-type: none"> Il pane Pane ricetta Pane in casa Pane fatto in casa Pane caloric Pane integrale Ricette pane Pane e vino Macchina del pane Fare il 	<ol style="list-style-type: none"> Pane in casa Pane fatto in casa Pane ricetta Pane Benedetta Fare il pane Lievito madre Pane comodo Pane lievito madre Pane bimby Pane di Benedetta
About baking*	4	8 (+100%)	5	10 (+100%)

The comparison between top 10 searches related to bread/baking in France & Italy pre-pandemic (Mar 19-Feb 20) and during the pandemic.

* Highlighted in bold are the terms with homemade bread and baking

The baking craze

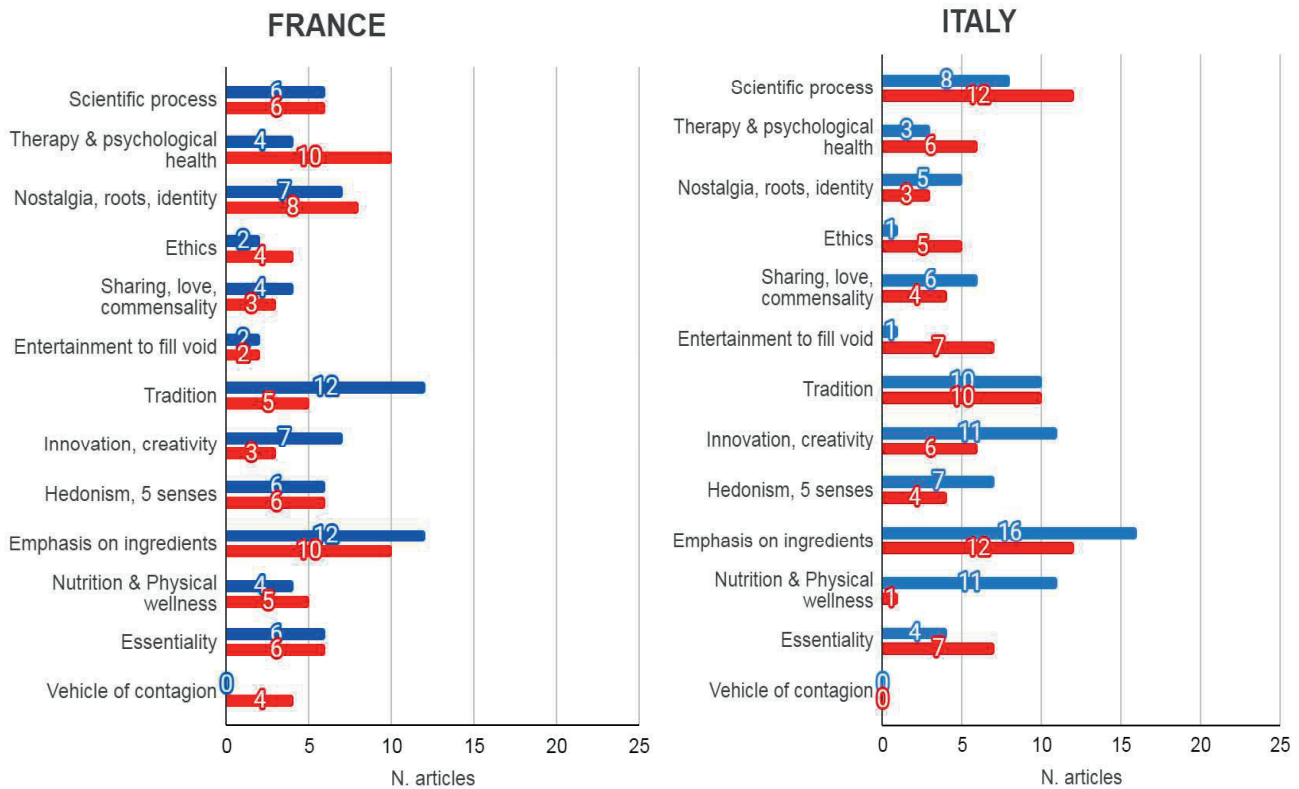
To observe the changes in the stance on homemade bread, a Google Trends analysis served as a good window. Bread and baking related keywords in the local languages such as ‘pain’ or ‘pane’, ‘pain fait maison’ or ‘pane fatto in

Beyond Bread: A New Rationale

There has been a significant shift in the values driving baking and bread consumption since the lockdown. A semantic analysis of 100 articles from sources such as *Le Monde*, *Le Figaro*, *Ansa.it*, *Corriere della Serra* revealed remarkable differences in the perspectives adopted to talk about bread across the two periods. The most noteworthy was the shift from a top-down viewpoint, which mostly explores bread through the eyes of bakers and experts, towards a more horizontal and inclusive one, with a focus on homemade. The doubling of the number of articles including bread recipes is another giveaway of the popular desire to get in the bread game.

The celebration of bread’s raw ingredients is the most frequently underlined aspect in the articles from both periods. But after March 2020, it loses limelight to new motivations behind baking. Dominant in Italy is ‘a sense of control and progress’ where baking is seen as a scientific process. The search for a perfectly leavened piece of bread through the best combination of variables (ingredients, dosages, timing) helps to rebuild certainty in times of uncertainty. Whereas in France, baking is valued as ‘therapy’ to pursue psychological wellness and an opportunity for self-expression, a form of luxury under stressful circumstances. Additionally, baking is increasingly viewed as a

■ 1 Mar 19 - 29 Feb 20 ■ 1 Mar 20 - 28 Feb 21



Baking Themes & Values : Frequency in articles

recreational activity without missing its value of essentiality. As people started appreciating the inner and mental benefits of the bread experience, the emphasis on the pleasure derived from its sensorial characteristics like texture, smell, and flavour took a backseat. Even the traditional association with commensality lost centrality because before the pandemic, sharing homemade bread was typically reserved to special occasions, while during the lockdown it became routine.

As baking entered the 'living present' of more French and Italians, the dichotomy between tradition versus innovation became trivial. On the contrary, inspired by a renewed need for solidarity, more articles applauded baking as an ethical practice promoting environmental sustainability, for example through the re-use of ingredients that would otherwise go to waste.

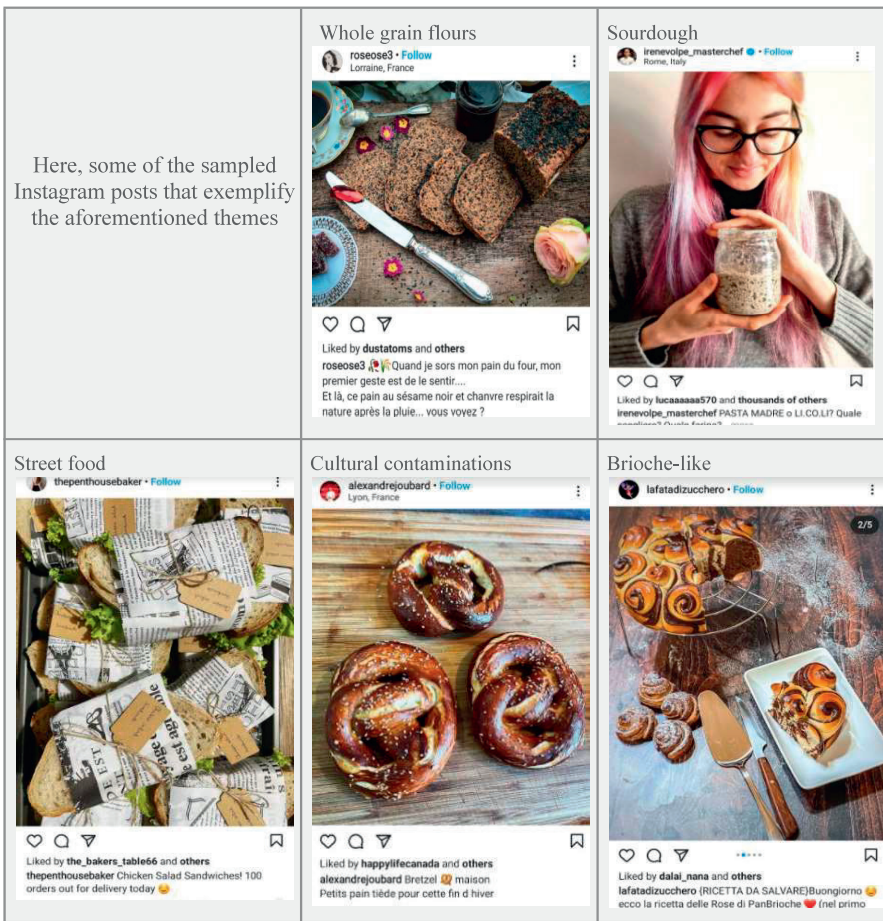
Despite these similarities, some differences exist between the two countries: the association of calories to bread was dropped in Italy whereas the nutritional argument remained stable in France. Additionally, the tendency to nostalgically connect bread to childhood

memoirs and heritage became less present in Italian articles, but not in the French ones.

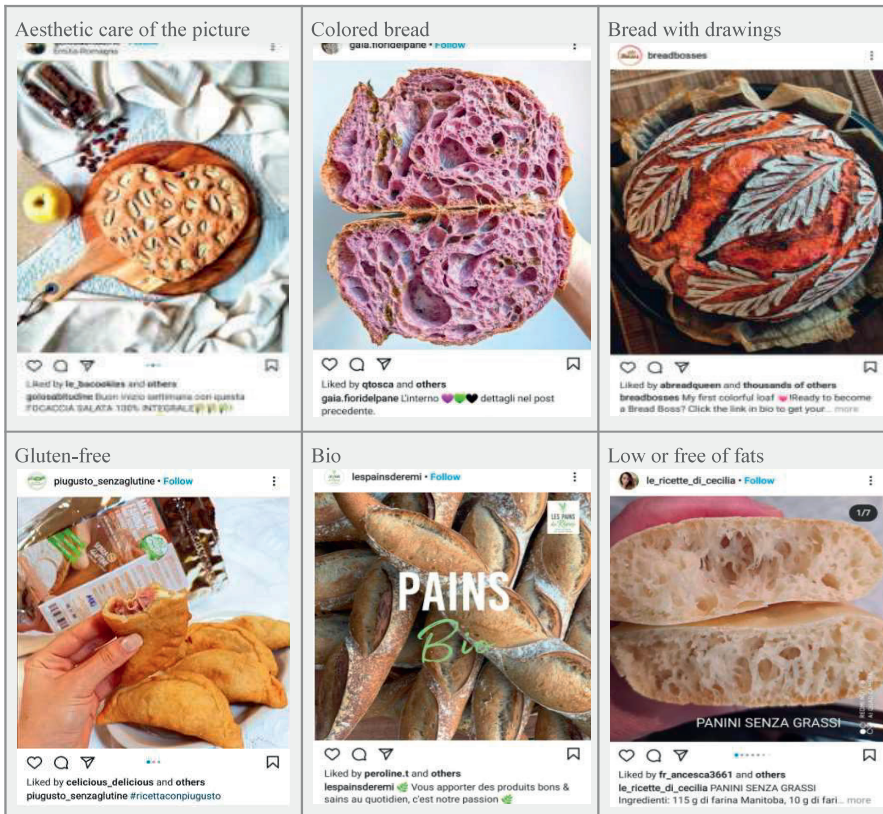
Bake it till you make it: new bread consumption patterns

The tastes of the younger generations cannot be ignored while considering the future of bread and there is no better place than Instagram to observe their new appetites. Here, the bread-baking-mania, which in spring 2020 emptied supermarket shelves of flour and yeast, still survives. An investigation of 800 Instagram pictures posted in April 2021, identified through French and Italian hashtags (local translations of #bread, #homemadebread, #sourdough, #leavened), confirms the popularity of the Do-It-Yourself (DIY) wave.

A majority of these pictures come from personal accounts rather than institutional ones. Although most of these 'wannabe bakers' are women, the number of men who bake is definitely not negligible. Moreover, the recurring themes and characteristics of these posts communicate a similar ranking of values associated with homemade bread to the ones found in the articles.



Themes that can be identified through social listening on Instagram



The use of sourdough and whole grain flours are the most recurring elements in both countries, in line with the leading attention given to ingredients. While posts showing a strong aesthetic care of the picture or bread with a coloured or decorated surface are frequent, contents highlighting nutritional properties such as organic, gluten free and low-fat bread remain niche. This suggests how bread is no longer perceived just as food for the body, but also for the eyes, and hence the mind.

‘As baking entered the ‘living present’ of more French and Italians, the dichotomy between tradition versus innovation became trivial.’

The number of posts showcasing bread in street-food formats; functional, to be consumed individually on-the-go, is consistent with the new attention given to individual rather than collective spillovers. At the same time, the link between bread and the idea of community evolves and expands. It welcomes infusions from other culinary cultures, with pretzels, bagels, pitas reinterpreted in French

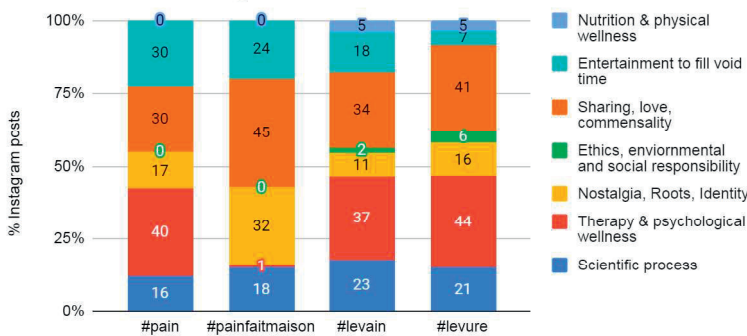
and Italian ways, and converges toward pastry with sweet and soft bread similar to a brioche.

Bread Ahead: a new range of innovations

Traditionally, the bread industry offered a limited variety of products, leaving consumers with few options other than the white sandwich bread. In the past fifteen years, a shift in consumer behavior and now, the pandemic, have stirred up a wave of innovative offerings. The foremost enabler of such innovations is the ‘**decommoditization**’ of bread. Consumers are curious to incorporate flour variants such as corn, rye, sunflower or quinoa and pay more attention to the quality of the ingredients than ever before. The increasing proclivity towards organic and healthy products, like those without palm oil or sugar as well as locally and ethically sourced options will continue to be unruffled by the higher price point.

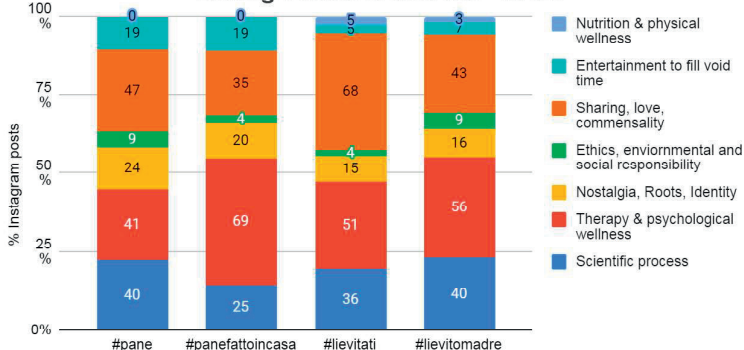
The revival of the forgotten cereals and recipes reflects the ‘**retro-innovation**’ trends that were already permeating the leavened products sector especially with the rediscovery of the use of sourdough. Moreover, the curiosity and the creativity that consumers channelled through bread in the last year will boost the convergence with the pastry world, or what food scholars have already labelled as ‘**briochization**’.

Baking Values & Motives - FRANCE



RANKING	
#1	Sharing, love, commensality
#2	Therapeutic activity & psychological wellness
#3	Entertainment to fill void time
#4	Scientific process
#5	Nostalgia, roots, identity
#6	Ethics
#7	Nutrition & physical wellness

Baking Values & Motives - ITALY



RANKING	
#1	Therapeutic activity & psychological wellness
#2	Sharing, love, commensality
#3	Scientific process
#4	Nostalgia, roots, identity
#5	Entertainment to fill void time
#6	Ethics
#7	Nutrition & physical wellness

Baking Values and Motives of the Instagram generation

A similar future awaits the fusion between culinary cultures, with the Italian pizza and the French crêpe reinterpreted all over the world. This **'culinarization'** is thoroughly reciprocated with Italian and French amateur bakers experimenting with their own versions of bagels, pitas and other breads from around the world. As the bread experience increasingly becomes personal rather than professional, the tendency to apply street-food formats to traditional bread recipes will be encouraged for their individual portions.

The role of digital technologies will be key to improving the service side of the industry. AI and data tracking will not only enable customisation of bread products and baking experiences, but also aid professional bakers in efficient inventory management and scaling up.

Bakery 3.0

The market players have already started mapping the possibilities brought in by these changes in the bread sector. Iterations of Bakery 2.0 which is 'smart' and 'friendly', such as Princi Bakery in Italy, are already thriving around the world. It seems inevitable to devise a new concept of bakery that, leveraging on

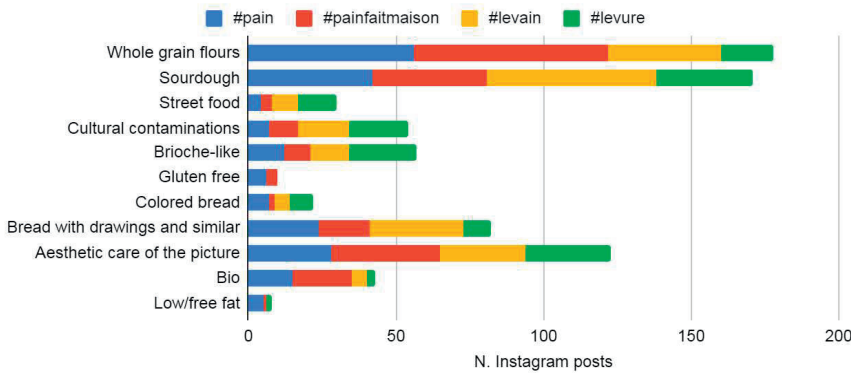
the ongoing innovations, responds to the new consumers' perception of bread in France and Italy by offering a 360° product experience.

Bakery 3.0 can be imagined as a digitally connected place for the community as well as for individual knowledge. It involves active engagement, where the quality and diversity of ingredients rhymes with aesthetic pleasure.



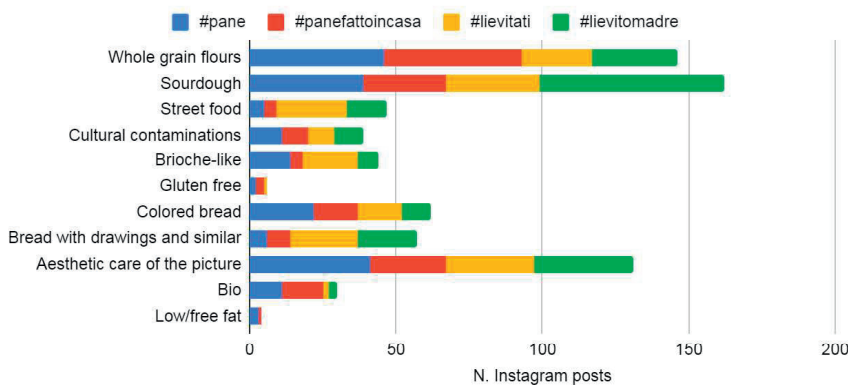
Bakery 2.0 already in action, Princi bakery, Italy

Bread Themes & Innovations - FRANCE



RANKING	
#1	Whole grain flours
#2	Sourdough
#3	Aesthetic care of the picture
#4	Bread with drawings and similars
#5	Brioche-like
#6	Contamination with other culinary cultures
#7	Bio
#8	Street food
#9	Colored bread
#10	Gluten free
#11	Low/free fats

Bread Themes & Innovations - ITALY



RANKING	
#1	Sourdough
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#3	Aesthetic care of the picture
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#7	Street food
#8	Brioche-like
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#10	Gluten-free
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Recurrence of bread themes and innovations on Instagram

More concretely, there are different paths through which this innovative bakery format can be implemented.

This new bakery is the *perfect place for a break* where customers can not only buy leavened products, but also take a moment for themselves in their frenetic routine: have breakfast, lunch, a quick regenerating break or an aperitif at closure time. To feed the rising curiosity towards the bread world, the new bakery would evolve into a *hub for learning* where the consumer can unravel the secrets of not just the products, but also the fascinating profession of a baker through engaging narratives and customer-centric activities. As people aim at being 'the main character' in their kitchens, bakeries could *activate baking workshops*, either online or in-store. In fact, these activities meet many of the values that drove the last year's 'baking mania': need for creative expression and relaxation, interest in the science of baking, and desire for shared entertainment. An alternative way to respond to these wants is to sell 'do-it-yourself bread boxes' containing the ingredients and guidelines to cook a specific bread recipe perfectly at home. This idea also fits the increasing demand for personalised solutions without missing profits.

'The link between bread and the idea of community evolves and expands. It welcomes infusions from other culinary cultures.'

The power of social media, proven by 'instagrammification' of bread during the pandemic, can be exploited to grow awareness (and, why not, sales). Bakeries should pay attention to the aesthetic side of their offer. The more beautiful and unexpected in colours, shapes and decorations the bread is, the more likely is the probability to go viral.

Ultimately, the bakery of tomorrow has its own app to deliver *hyper-personalized experiences*. Imagine if you could choose your favourite flour mix, topping ingredients, and even the shape and colour of your piece of bread, and reserve it just through a click. This approach would also be appreciated by the ethically conscious consumers. It allows room for all dietary needs (for example gluten free and organic), reduction of food wastage, and cutting inventory costs as bakeries could increasingly plan their production in advance based on reservations.

The fling of French and Italians with bread seems far from over. Reimagined inspirations, new preferences and even innovative bake shop ideas emerge. In the darkest time, French and Italian people have, once again, contributed from their kitchens to reinvent the present and the future of their culinary heritage. These contributions have already permeated borders and are beginning to be adopted globally, a step closer to making Bakery 3.0 a reality.



Eating with your eyes: aesthetically pleasing focaccia goes viral in 2020

This article is adapted from 'When the Bread Consumers become Bakers'. A research about values and trends in homemade bread baking during the Covid-19 in France and Italy by **Sara Antoniotti, Aurora Belmont & Laura Oppici** (Research Paper, Bocconi University & ESSEC Business School, 2021).

INTERVIEW

Maria Pocovi

At the Crossroads of Emotion & Technology



EMOTION
RESEARCH LAB
The artificial empathy company

FELICIDAD	11%
SORPRESA	75%
ENFADO	0%
DESAGRADO	0%
MIEDO	9%
TRISTEZA	0%
EMOCIÓN SECUNDARIA DELEITE	
ACTIVACIÓN	75%
COMPROMISO	25.7%
SATISFACCIÓN	43.8%
EXPERIENCIA	0.7%

Emotion Research Lab founders,
Maria Pocovi and Alicia Mora

Food 2.0 LAB: *What inspired you to start the Emotion Research Lab?*

Maria Pocovi: I started this project six years ago with the idea of connecting technology with humans. The key point is to make it possible for the technology to have the capacity, the ability, to read and to understand people's emotions. The first step of our work has been to develop facial recording which means facial emotion recognition using computer vision and deep learning. So, we are an artificial intelligence company.

F.L.: *You work on facial emotion recognition and also on eye-tracking. About facial emotion recognition related to the food topic, I would like to understand how it works, how we can really understand the taste and the flavours.*

M.P.: Regarding the food testing, at the beginning the companies started to use the technology for real analytics, to understand how people react in real time. One of our clients has been conducting research for product testing. He came to us and said: 'Often it's very difficult to really understand the emotions of the people. When they are testing new products, or when we need to move these products from different countries. It's very difficult to see the real level of engagement with these new products'.

Taking emotions into account in purchasing strategies has become essential in a world where we are submerged by advertising messages that are sometimes contradictory: just think that the average attention span of a person to a stimulus today is only 5 seconds, whereas ten years ago it was 10 minutes!

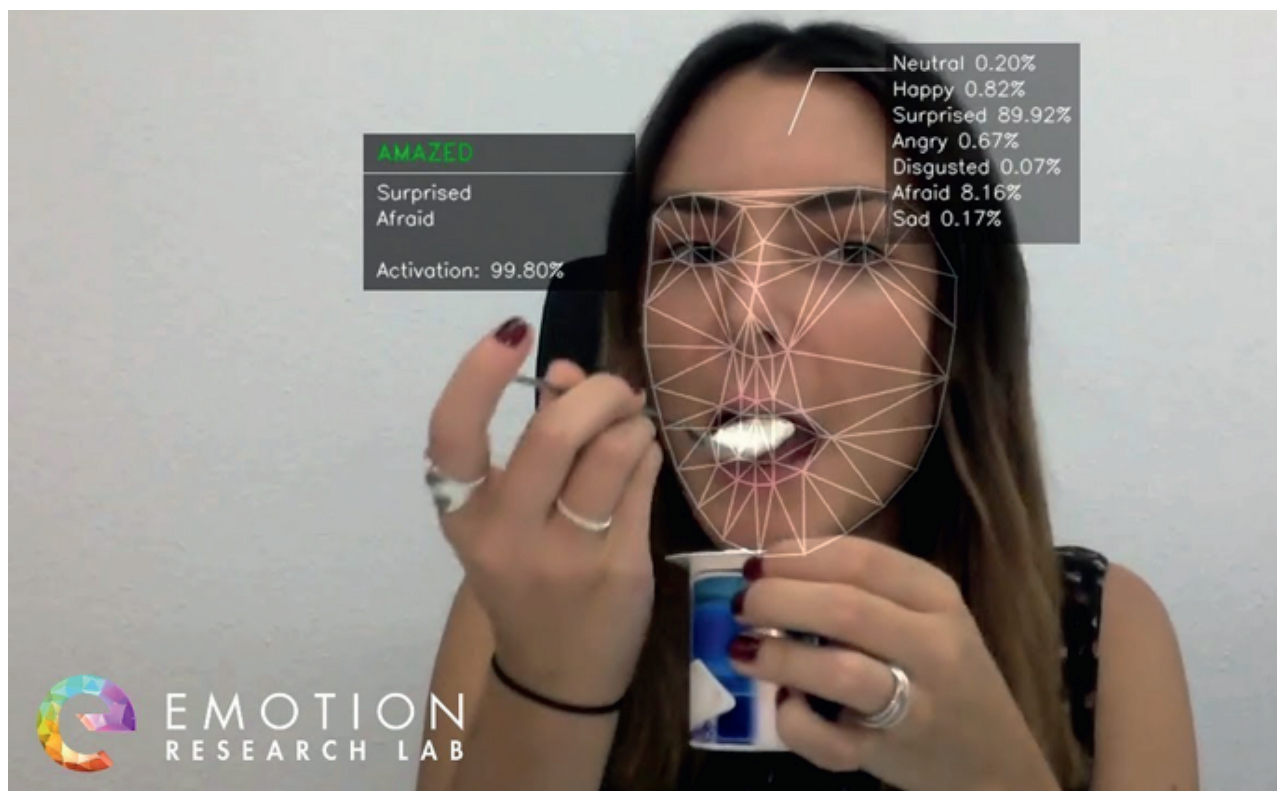
So, we thought we can use our technology here. The testing experience starts from the first look at the product, and sometimes we also analyse the visual impact of the packaging. Traditionally, the results

obtained through consumer surveys were most of the time biased, as much by the will, conscious or not, of the respondents not to tell the truth, by the way the questions are asked, by the influence of the environment in which the participants are placed, etc. By using neuroscientific techniques, such as facial recognition, we can learn the real insights of the consumer in real time.

I remember our first project in food; it was with an American company trying to bring a special yogurt to Mexico. In Mexico, as in many places, colour is connected with the flavour. In this new brand all of the yogurts had white colour, independent of the flavour. So you could have strawberry yogurt in white. People's reactions were very strange about this. Some would say: 'no, I don't like the product' whereas some really liked it, but overall, the emotion had been that of surprise, because they expected it to be pink!

F.L.: *Do you conduct research on the sensory experience itself (discovery of a new taste, an unknown flavour, a surprising texture)?*

M.P.: Of course! It has been scientifically demonstrated that taste and smell are the senses that send the most information to the brain and generate the most memories in the eater. The algorithms we have set up transform these reactions into primary and secondary emotions. This 'translation' allows us to detect both



Using technology to analyse facial emotions and subsequently consumer reaction from consumption of different foods

pleasure and aversion for certain foods, as well as the emotional activation generated by the experience of different flavours and textures.

F.L.: *I guess the ways we react in Europe are not really different between Spain, France, England or Belgium... But it would be a much bigger difference if we have to make comparisons with countries from Africa, or Asia. How is the machine learning able to understand this difference?*

M.P.: The key point is the dataset. You need to work with huge datasets, and they must be balanced. They must include all the ethnicities. Machine learning models read the different elements when people are expressing different emotions. When you are working with deep learning technology, every project starts with building a dataset. Artificial intelligence would be the perfect tool but, currently, there is still a human element for levelling images, videos...

You can work with different ethnicity, but in any case, the level of accuracy is subject to having a balanced dataset with a big number of images that really allows to work in global environments. With facial coding, the problem is that sometimes datasets are only trained for one ethnicity. So, depending on the project, it's best to use the appropriate model. If you work on a Caucasian subject with Asian dataset, the result would be a disaster (laugh).

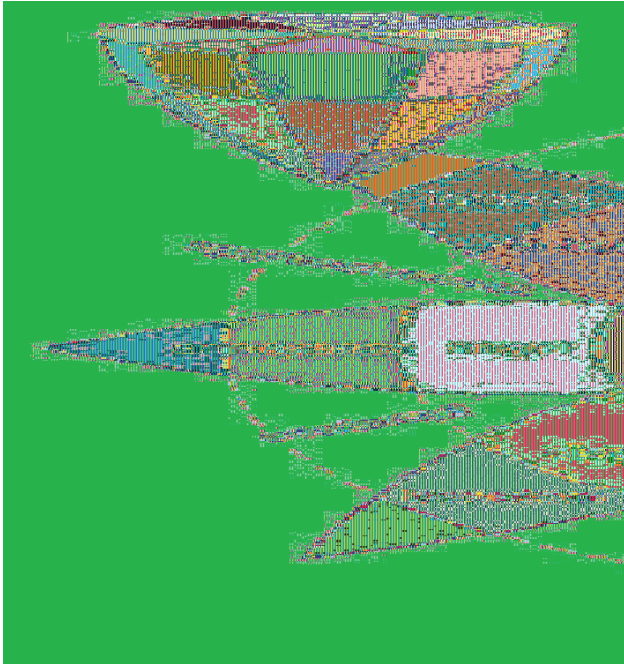
F.L.: *The way we express ourselves is also a question of cultural values. Are these also included in your project and in the datasets?*

M.P.: No, datasets are only working with facial expressions. I understand your point and, of course, human emotions are a very complex challenge. So, when we talk about how humans express emotions, you obviously need to consider the voice, the face, the movements, but first of all you really need to consider the context. At this point, we are talking about facial coding and having information in a scalable way. You should also consider that earlier, clients were analysing the videos manually.

Let's not forget that deep learning is a recent field of research. The amount of data we collect is growing, as are the analytical models. At Emotion Research LAB, we fully assume that our work is constantly evolving!

F.L.: *About facial emotional recognition, there are a lot of aspects: emotion detection, emotional metrics, moods, secondary emotions... What do you call a secondary emotion... How do you distinguish between these different emotional levels?*

M.P.: Our work is based on the work of American psychologists such as Paul Ekman or Robert Plutchik, particularly on his theory of the 'wheel of emotions'. According to him, our emotional system is structured around six basic sensations (happiness, surprise, anger, disgust, fear and sadness) from which an infinite number of more



Wheel of Emotions by Robert Plutchik which explains primary and secondary emotions

subtle emotions unfold. These secondary emotions are essential because they allow us to understand in detail the behaviour and feelings of an individual or a group of individuals. Reading a secondary emotion comes from the basic emotions, but the algorithm has to connect a combination of the basic emotion with their intensity.

However, in practice, the treatment of these secondary emotions often presents us with difficulties of interpretation: surprise can be the manifestation of a simple intake of information or, on the contrary, of irritation, just as happiness can at the same time be manifested by pleasure, optimism or ecstasy. The division between primary sensations and secondary emotions is therefore only theoretical: our algorithms are precisely parameterized to analyze their combination and their respective intensity.

F.L. : *Is facial emotional recognition also combined with eye tracking?*

M.P. : We actually use guesstimation and not eye tracking. Eye tracking uses infrared solutions and is more accurate. We are trying to reduce the amount of uncertainty which means constantly developing new analysis tools. Eye tracking is one of them and it is a good complement to our facial recognition models.

F.L. : *What market sectors does the Emotion Research Lab operate in today?*

M.P. : Our clients are very global. For example, we work with companies in the USA, to understand experiences with real time applications. So, you have cameras in a store, and you can analyse people's reactions while they are shopping. We work with a company in Dubai and Mexico, for their webspace innovation. We worked with a company in China to introduce this emotion

recognition in smart sales process. Of course, we also work with companies for food testing, with big companies, when they have to launch new products, like ice cream (laughs).

F.L. : *In the coming future, what would be more important? Real life analytics or the usual testing?*

M.P. : I don't know, because the Covid situation has changed the game. Online activity is becoming very necessary while face to face is going to be more complicated. In real analytics, it's going to be a combination. For example, we are now launching one application with a new deep learning model to understand if people are wearing a mask or not, for safety reasons. Computer based things are always a challenge for us, we enjoy to do that.

The other day, I was talking to a good client in the USA who prefers to close the office and maintain remote working because it would be complicated if something happens to his employees. At the moment everything still must be done online. We need to see how the market is going to react during 2021 but, the sure thing is that the new clients and their demands are centred around online solutions.

F.L. : *When someone creates a machine, he or she is usually the very first one to try it in order to challenge its efficiency, right? Were you the first ever person to use your application, and did you video record yourself to test the analysis program?*

M.P. : Myself? (laughs). Yes, I have done it, of course... I believe first it was Alicia, the co-founder of the company, she's on the technological side. So, she was the first person to do it and, after that, I did this test on myself.

F.L. : *Did you find it disturbing? Not especially the real time thing, but more about how it really works? I think it must be a bit different when the tester is yourself, is not it?*

M.P. : A bit. You put yourself in front of the camera and then read your emotional reactions. You can't control your emotions because one of the points of the technology is that you can't lie to the machine. But I am not the right person because, in the end, I know the technology... For example, I know the angles from where the machine can not read my face (laughs)

The image shows a screenshot of the Guardian Unlimited website from October 5, 2007. A heatmap is overlaid on the page, indicating where users' eyes were focused. The most intense areas (red and yellow) are concentrated on the top navigation bar, the main headline area, and the 'Webfeed' section on the right. The website layout includes a search bar, navigation links, a main content area with several news articles, and a sidebar with various services like 'guardianjobs' and 'Webfeed'.

Eye tracking technology used by webcams to understand key attention points of the information consumer

F.L. : (laughs) So did you cheat?

M.P. : (laughs) For instance, many times, companies or clients ask us in the exhibitions to allow the people to see their own emotional reactions and it's hilarious. Of course, the first time, people are a bit surprised, but eventually they enjoy it so much, staying in front of the screen looking at their own emotions, they talk, they feel and see emotions, they act like kids.

F.L. : It's not really surprising when you know that most of the people already like to take selfies, this surely sounds like a game to them.

M.P. : Yes! I believe the culture is changing in the way that people are now increasingly into visual, they like to see everything but, most importantly, they want to show their own emotions.

F.L. : Emotion Research Lab is not the only company in the 'digital emotion market'? Affectiva also works in the same field... What would be the big differences between the two companies?

M.P. : She, because CEO and founder is also a woman, has been in this business since the beginning. Rana el Kaliouby started Affectivas as a spin off from MIT, so they have the investment from it, and a very powerful network. Now they are focused on the future of the automotive, and how emotions can be connected. Because it's from the MIT, the only thing that I can tell

about them is that I'm very proud to be in the market that people consider us as competitor.

We have been focused on how we can explain the emotional reaction deeper and to understand the secondary emotions. And I believe for companies like us, the challenge is the context. This is why we are now including masks; this is why we are working on objects identification, and I believe the way that you can improve the best is to make 'understanding the context' possible.

Our approach is more visual and contextual while they are working with voice recognition. So, I believe we are taking the solution from a different angle. In the number of emotions that we can create, we are reading more emotions than Affectiva does, because the approach is different.

F.L. : How do you imagine yourself and your company in 10 years?

M.P. : (laughs) No... Seriously, in 10 years, for me, the answer is obvious: a better consideration of the geocultural context in which our emotions are expressed. Our roadmap is clear, even if it may seem ambitious: the next ten years must allow us to build models for the analysis of emotional experiences that do not simply take into account facial expressions or non-verbal communication elements, but also all cultural norms and habitus.

Interviewed by Cyprien Rose





FOOD SCRIPTS

- 1 Decommoditization**
Redefining distinction
- 2 Bulking Up**
The comeback of bulk buying
- 3 Briochization**
The convergence of bakery and pastry

FOOD SCRIPT # 1

Decommoditization

Redefining Distinction

While construction of pure homogeneity between commodities, including agricultural ones, is at the heart of the process of commoditization, decommoditization is all about removing the banality from these products. It means presenting fresh products not just as a commodity with no measurable differences between one another, but as a special, unique item which incorporates product valorisation, provenance, distinct taste and sustainability.

For a long time, considered merely raw materials, cereals, fruits, vegetables and other agricultural products are now reclaiming their position at the centre of the narrative. These dynamics are a part of a wider process which consists of enhancing this raw material, communicating on its properties (geographic, social, genetic, organoleptic, environmental, ethical, etc.) and presenting it as the central selling point.

The Drivers of Decommoditization

The rationale behind decommoditization is strongly linked to top-priority issues such as sustainability and subsistence. With the liberalization of trade markets, food was commoditized to a money metric like any other commodity that is traded and sold for profits. For decades now, instead of growing food for consumption, commodity crops have been cultivated to be sold in international markets forcing the poor to depend on market fluctuations for food. These dynamics have urged the need to identify solutions that will allow to distinguish food, particularly agricultural products, as the indispensable items that they are.



Bob Quinn of Kamut Khorasan Wheat



Cuties Citrus based in California are the perfect healthy snack

Case(s) in point

A growing share of food commodities are now being marketed as value-added products. Through branding, labelling and a marvelous milieu, raw agricultural foods transform their identity into a culinary and social brand.

Fruit is a category that has well-adjusted to the world of decommoditization. **'Cuties' Citrus** have their sweet origins in California, where they are family-owned, family-grown, non-GMO verified, easy to peel, seedless and loved across the country. **'Zespri' Kiwi** is available all over the world from Europe to South-East Asia in its 4 varieties namely Zespri Sungold, Zespri Green, Zespri Bio Sungold and Zespri Bio Green, 'delivering better flavour, better quality and more vitality in every bite'. **'One Bananas'**, from 100% organic farms in Peru, are high quality and delicious bananas grown in a socially and environmentally responsible manner.

The 'fruits of the sea' have not stayed far behind. Produced by the Gillaudeau family and their small private company, which was founded in 1898 in western France, **Gillaudeau oysters** are a brand of decommoditized edible oysters that receive the best care throughout their farming improving their degree of ripeness, adding on to their gourmet factor.

Most strides have been made with coffee, the second largest traded commodity in the world. Almost 10 percent of coffee in North America and Europe is now certified according to organic, fair trade, Rainforest Alliance, UTZ Certified or similar standards. Major brands and retailers have

made pledges to source sustainable coffee, with many making social investments in developing countries. In 2014, **Dunkin Donuts** was one of the first fast-food brands to launch its first single-origin, rainforest alliance certified Colombian packaged coffee, a medium-roast coffee with a full-bodied flavor and sweet finish.

Grains and cereals are also adept with the importance of a unique identity. **Kamut** wheat is a brand of Khorasan wheat whose grain is twice the size of the modern-day wheat and has a rich, nutty flavour. Most likely originating in Mesopotamia, Kamut's branded Khorasan wheat is grown organically in the Northern Great Plains of North America where the dry climate similar to its origins, ensures the best quality is consistently obtained and the produce is uniquely vitreous with a rich golden colour.

The process certainly doesn't limit itself to fresh agricultural produce as some visionaries were already applying the principle to derived products for decades. **Mutti**, the Italian producer of canned tomato products paid its farmers more than competitors, a fixed price no matter how many tomatoes were produced and a premium for better quality. Farmers were asked to harvest five days later than normal, producing a riper, tastier product without adding sweeteners. "No one believed that you could create a brand in tomatoes—a commodity". Mutti was building its brand through investments in ideas unheard of in long-running family agricultural businesses: emphasizing high-quality raw materials, building close relationships with farmers, and spending on vigorous marketing and advertising. Today, many try to follow suite.



Mutti Tomato products made from family grown tomatoes in Italy

Turning the 'volume' down?

For a vast majority of farmers today, the focus is still pretty much on volume because that is what they get paid for. Then, is the pendulum of agriculture currently heavily stuck on 'commoditization' destined to swing back in the not-too-distant future? High-flying Agri-tech Boston start-up, **Indigo Ag**, predicts that agriculture will embrace systemic changes based on what it sees as the consumer, food processor. Regulatory demands will pay producers on quality, sustainability, and more 'grown to order' crops. With escalating consumer consumption standards, the inevitable climate conversation and the growing significance of narratives in purchase decisions, decommoditization seems to be riding a rollercoaster that only goes up!



Gillardeau oysters from south-west France are fleshier and gourmet.

FOOD SCRIPT #2

Bulking Up

The comeback of bulk buying

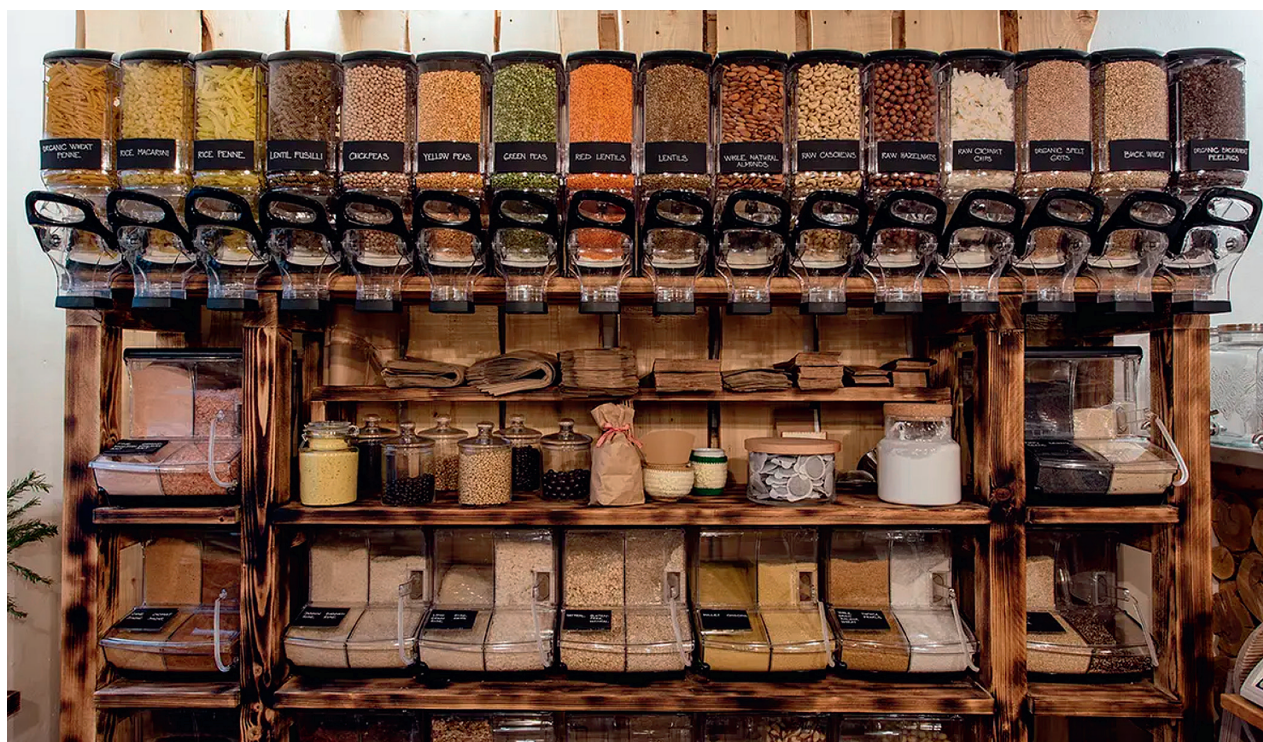
The bulk aisle can no longer afford to be the neglected corner of the supermarket that has long resisted a transformation. According to the U.S. Environmental Protection Agency, packaging and containers make up 23% of what we dispose of annually.

What doesn't get recycled ends up in ever-expanding landfills, air polluting incinerators, or accumulates in the oceans. It is no news that pollution from single-use packaging is a global crisis and scientists predict that this plastic waste will increase four times by 2050. In most supermarkets, the bulk sections are just there, not actually frequented by the shoppers as often as they should be. But small & independent natural foods stores are striving to make bulk a mainstay. It is time for grocery's most unwieldy section to shine as a standalone show.

Weight vs Unit

In France, the word 'VRAC' which refers to bulk stores was first used in the 18th Century as 'en vrac' for the fish put in barrels without being arranged in beds. Later on, in the early 19th Century, this started referring to goods exhibited or transported without wrapping, without particular conditioning, pretty much what bulk stores stand for today.

Bulk stores are simply about purchasing by weight and not by unit. The concept is not just good for the environment, but also for the wallet. The customers can bring their own clean container or purchase a reusable option available in the store and fill the container with the product of their choice. The container is first weighed empty and once filled with products, the weight of the container is deducted at the checkout counter, measuring only the product. **Daybyday**, the leading bulk grocery store present in France, Luxembourg and Belgium with 76 shops offering a range of over



A standard bulk-buying store

BUT WHY ARE THE CONSUMERS 'BULKING UP'?

- **NO WASTE:** Allows them to buy just as much they need
- **ECO-FRIENDLY:** No packaging means it's environment friendly
- **COST:** They save money because bulk is cheaper
- **EMPOWERMENT:** Consumer plays an active role instead of a passive one

AND WHY ARE THE SELLERS 'BULKING UP'?

- **COST:** Removing packaging reduces cost of products
- **INVENTORY:** Replenishing is a lot easier and cheaper
- **SUPPLY CHAIN:** Shorter supply circuit means lower hassles and cost
- **PERSONAL:** More interaction with customer & personal touch

750 products for bulk purchase, recently launched their own mobile app for bulk shopping, the first of its kind. **L'Épicerie Kilogramme** is another such store which is a firm believer that customer has the right to know where their food originates and to be given the choice of reusable instead of disposable. Dedicated to the zero-waste lifestyle, **Mes courses en vrac** was born out of the founder, Carole Lymer's, transition to 'a way of life more consistent with the rhythm of nature around us.'

'Honey, we don't waste'

Negoziio Leggero, a Sicilian zero-waste lifestyle store recently opened a franchise in Paris and operates an online store active throughout Europe.

In Hong Kong, **Edgar**, a sustainable lifestyle store and **Live Zero**, a universe of zero waste and bulk items are acting as a catalyst in favour of the motion. Malaysia's **The Hive**, with its tagline, 'Honey, we don't waste' was the first zero waste store in the country offering the largest bulk whole foods option, also cleaning products and anything one may need at home. It now has 5 outlets spread throughout the country.



Reusable glass containers instead of packaging

Interestingly, but not shockingly, the French took VRAC a step further with **Vin En Vrac** (au tonneau), which brings together a selection of bulk adult beverages—with wines from across France and distilled spirits that you bottle yourself and take home. Another literally adventurous endeavour is **VRAC en Chartreuse**, a bulk grocery shop on wheels which will offer ethical, organic and local Chartreuse products exclusively in bulk or in returnable jars. **La Maison du Zero Dechet** allows visitors to equip themselves to reduce

their daily waste and offers not just products but also events (practical workshops, conferences, screenings, debates) around issues related to waste management and implementation.

In Europe and some parts of Asia, the bulk store concept has fared significantly well but the American consumers were slow to get used to the format. At the forefront of raising awareness, an event called The National Bulk Week was first organised by BIG, or the Bulk is Green Foundation in 2011 in Portland with bulk block parties, offering further discounts on bulk foods. US' first zero-waste bulk grocery store, **In.gredients**, opened in 2012 in Austin, Texas but had to shut its doors shortly after due to a failure in changing the shopping habits of consumers. The bulk store entrepreneurs were however undeterred.

The momentum picked up around 2016 when a plethora of standalone bulk stores started cropping up across the states. Katerina Bogatireva, the founder of **Precycle**, in Brooklyn is one such entrepreneur. 'Just having a little trash feels really good' she says. The Filling Station, Dill Pickle Co-op, Simply Bulk Market, Zero Market, the Refill Shoppe are some others that followed suite and are doing well.

The New Old

According to CNN, "Zero waste isn't just for hippies anymore" and surely the ordinary customer is catching on. We wait for supermarket chains and packaging companies to have this Eureka moment! While on one end, daily consumption items like oranges are being 'decommoditized' by branding and labelling each individual fruit, bulk stores are all about 're-commodification' but only the best parts of it. They promote de-processing of foods by getting rid of a lot of intermediary steps and of course all the packaging. The customer is once again at the centre of the act of grocery shopping. So, the close customer interaction, the investment and support of the nearby residents, organic and local products, it sounds all too familiar. Zero-waste bulk shopping can thus be dubbed as the new old or the revival of the neighbourhood shop. The question remains on whether or not it will become mainstream.

FOOD SCRIPT # 3

Briochezation

The convergence of bakery and pastry

Often clearly demarcated in the past, the border between bakery and pastry-making appears to be scrambling. The colours, softness of the crust and crumb, customizations, the codes of pastry are percolating into bakery more and more, giving rise to a novel amalgamation.

Food scholars have coined this convergence as 'Briochezation', representing neither entirely bakery, nor pastry but a hybrid of both. Not to be confused with Viennoiseries, which represent Austrian or Central European pastries that were culinarized by the French centuries ago, Briochezation not only encompasses the many hybrids that currently exist in the world of pastry but also new forms of soft, sweet, milky breads beginning to grace the storefronts of bakeries across the world.

Meet The Hybrids

For culinary historians and consumers alike, 2013 was the year of the 'cronut' - the most famous reiteration of the hybridisation trend by renowned pastry chef Dominique Ansel. The 'cronut', a croissant-doughnut hybrid resembles the doughnut in shape and is filled with cream just like one but has the flaky, buttery texture of a croissant. However, the world had fortunately not been deprived of this kind of hybridisation BC, that is, Before Cronut. The pretzel-croissant was



Cronuts by Dominique Ansel, a hybrid between Croissant and Donuts, New York



A cross-sectional cruffin from Bake Street's Eva, a food blogger based in Madrid

accidentally birthed in 1997 when Sandra Nieve, a pretzel baker in New York, dipped a croissant into the lye solution she used to give her pretzels their sheen. She baked it, dusted it with salt and sesame seeds, and a pastry star was born. In 2020, Marks & Spencer revived this combination and launched a croissant-pretzel hybrid of their own, calling it the 'Cretzel'.

At first considered a fad or merely a passing trend, hybridisation has rather stayed for long and brought many inventions to the consumers. A 'cruffin' is another such cross between classics and innovation that continues to attract consumers. As the name suggests, the cruffin combines the texture and layers of a croissant with the shape of a muffin and is sometimes centre-filled with some flavoured cream for the extra kick. There's also the 'Donnoli' (Donut + Cannoli), 'Crookie' (Croissant + Cookie), 'Townie' (Tart + Brownie), 'Macaronuts' (Macaron + Donut) and the list goes on. The key is to break the mould of convention and get rid of any pre-conventions about what a certain bakery product should be like. Start with visuals, then play around with names and ideas of which products would be paired best. Delifrance was the latest to tap into this world of concoctions at the end of 2020 when it released its 'Brownie Swirl', a combination of puff pastry and brownie.

That Brioche Dough: Looking Past the Fusion

Hybridisation is a sure facilitator of bakery and pastry innovations but Briochization goes a step further. The foundation is the brioche, a bread of French origin first appearing in 1763 as art in French painter Jean Baptiste Chardin's 'La Brioche'. It is made in the same basic way as a regular bread but has the richness of pastry because of the extra addition of eggs and butter and occasionally sugar. It is considerably softer and fluffier and is often laminated.

A decade ago, not many people had heard of the Babka or the Rugelach, but today, owing to the phenomenon of briochization, these have become mainstream in bakeries globally. Since consumers are looking for familiar products but with a twist, briochization offers a way to reinvent classic flavours, taking the formats and taste of an original product, but baking it differently with ingenious techniques, ingredients or flavours. Additionally, with the snacking culture on the rise, people are eating more frequently in-between meals, often going to these fun and creative treats for a break.

Consider the latest forerunner, the Hawaiian Roll which ironically originates from the Portuguese pãõ doce, 'sweet bread' but was made popular by the California based 'King's Hawaiian' across The States. It's the quintessential example of briochization because despite being very much like pastry in its softness, fluffiness and sweetness, it is still consumed as bread to make sandwiches or smear with butter and enjoy as dinner rolls. Another example is India's 'Harvest Sweet Bun', baked with candied fruits & peels and when buttered, these are good enough to go inside kids' lunch box or enjoyed as a meal with tea. Lelecha, a Shanghai based high-end tea brand of 'Tea Drink + Soft Bun' offers a range of such products that represent the rise of the brioche culture in Asia.



Hawaiian rolls, now synonymous to 'dinner rolls' have become a dinner staple for the Americans

Owing to a freer baking tradition in the East, a myriad of brioche-based inventions has found success locally and some have managed to spread to the shelves of European and North American bakeries. Bread's basic culinary role, its ability to blend into food systems has given rise to a mosaic of local variations. With new recipes, new practices and new commensalities, Briochization is predicted to be the new whim in the global baking landscape.



A swirly babka by Sarah Hobbs of food blog todosamanlastetas.com



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