

EATrends

by AZTI

*Most important trends
in food innovation*





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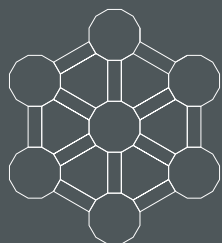
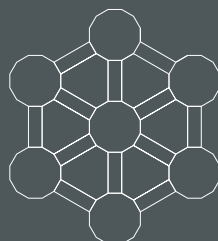
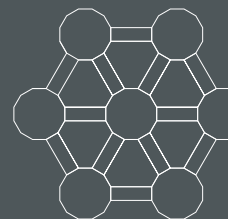
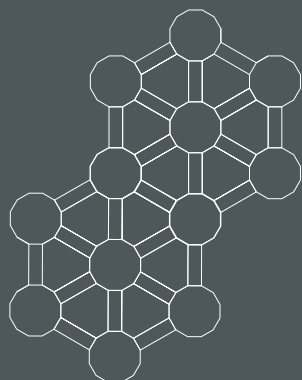
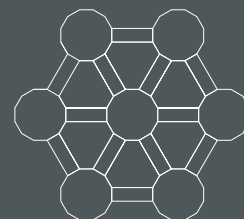
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© Photos: TFM (The Food Mirror) GAME 2014, Mintel GNPD, Trendwatching

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1. TRENDS:

what are they & what opportunities do they offer?

A **consumption trend** is a new expression of consumer behaviour or attitude based on basic human needs, desires and aspirations. Trends provide a vision of how these changes have an impact on consumption behaviour and as a result in the business environment. To achieve this, consumers need to be approached beyond behaviours and consumption, going deeper into their since besides interpreting behaviours, knowing the motivation behind us as human beings will enable us to connect them to innovation.

If your activity has an impact
on consumers, you must
inevitably embrace trends

As trends **can be found in any part of the world**, we often see consumption trends reproduced in culturally and geographically remote societies. This is due on the one hand to globalisation which has standardised consumer tastes. On the other hand, trends are based on basic human needs and desires which are universal. However, these global trends influenced by culture and territorial values are reinterpreted and expressed in different ways in a more local context.

In the same way, trends may transversally apply to **different industrial sectors**. Thus, given the current continuously changing competitive background, it is important to keep in mind how trends are being applied to innovations in other sectors, so they can be used as inspiration to adapt them to the reality of our business.








Trends are approached from a glocal
and transversal point of view

Traditional market research supplements and supports trend studies. Nevertheless, while traditional market research looks back, trends allow us to understand the current market and enable us to anticipate future demand by early detection of business opportunities and innovation (market niches) connecting to it and therefore in alignment with social demands.

The study of trends can leverage
social and business, product/service,
marketing and communication
innovation and the development of new
business models

**Trends are not an end in themselves but a means to successful innovation:
profitable for companies and relevant for consumers which are at the centre of
innovation.**

Trend Commandments

- 01 Love your **#consumers** above everything else 
- 02 You shall not use the word **#trend** in vane 
- 03 You will return value **#innovation** to your consumers 
- 04 You shall not mistake trends and **#fashion** 
- 05 **#You shall observe** and analyse innovation for trend study 
- 06 You shall not kill a trend due to a failed **#innovation** 
- 07 You shall take the past into account but look to the **#future** 
- 08 You shall keep an open mind with a more **#glocal** point of view 
- 09 You shall come out of your **#sector** 
- 10 You shall understand trends as a **#tool** to detect opportunities 

Once trends have been identified and formulated, the following questions arise:

What does this trend mean for my business?

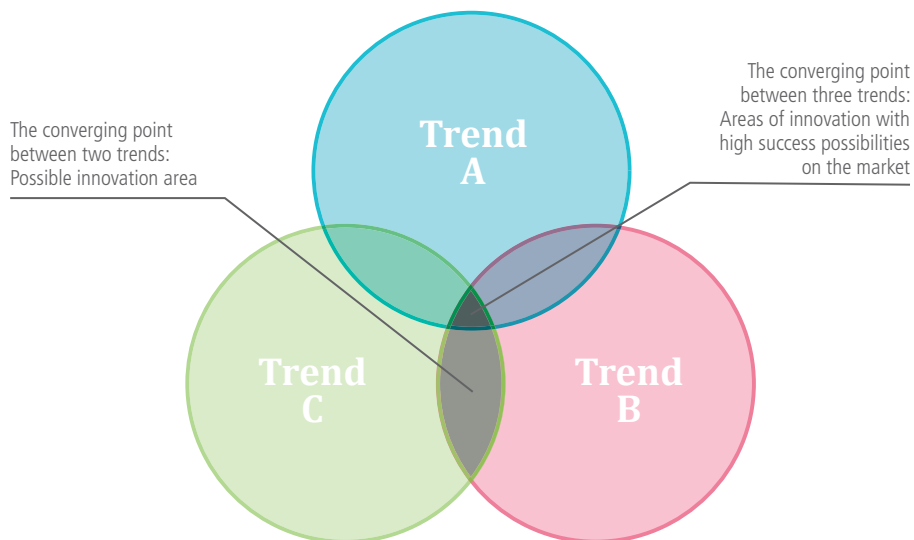
How can I transform it into a new solution to connect to consumers?

The trends presented here are “moving” and will be relevant for the food sector in the short and medium term. The examples shown as representative of each trend indicate that companies are already taking advantage of them. As their application may be immediate, the challenge is for companies to interpret trends in time and adapt them to their business and geographical action scope.

Working with trends promotes change in the following axis:

- **Innovation:** promoting differentiating products and services for the consumer.
- **Company:** in processes and management, innovation culture, identification and development of new business models.
- **Marketing and communication:** with strategies and actions aligned with target trend audiences.

Trends are connected as they may originate from the same motivation from individuals but expressed in different ways. The converging point of several trends represent **scopes with greater innovation potential and higher success possibilities** on the market.



In addition, trends open up interesting paths for **food hybridisation with other sectors** such as technology, design, tourism or health.

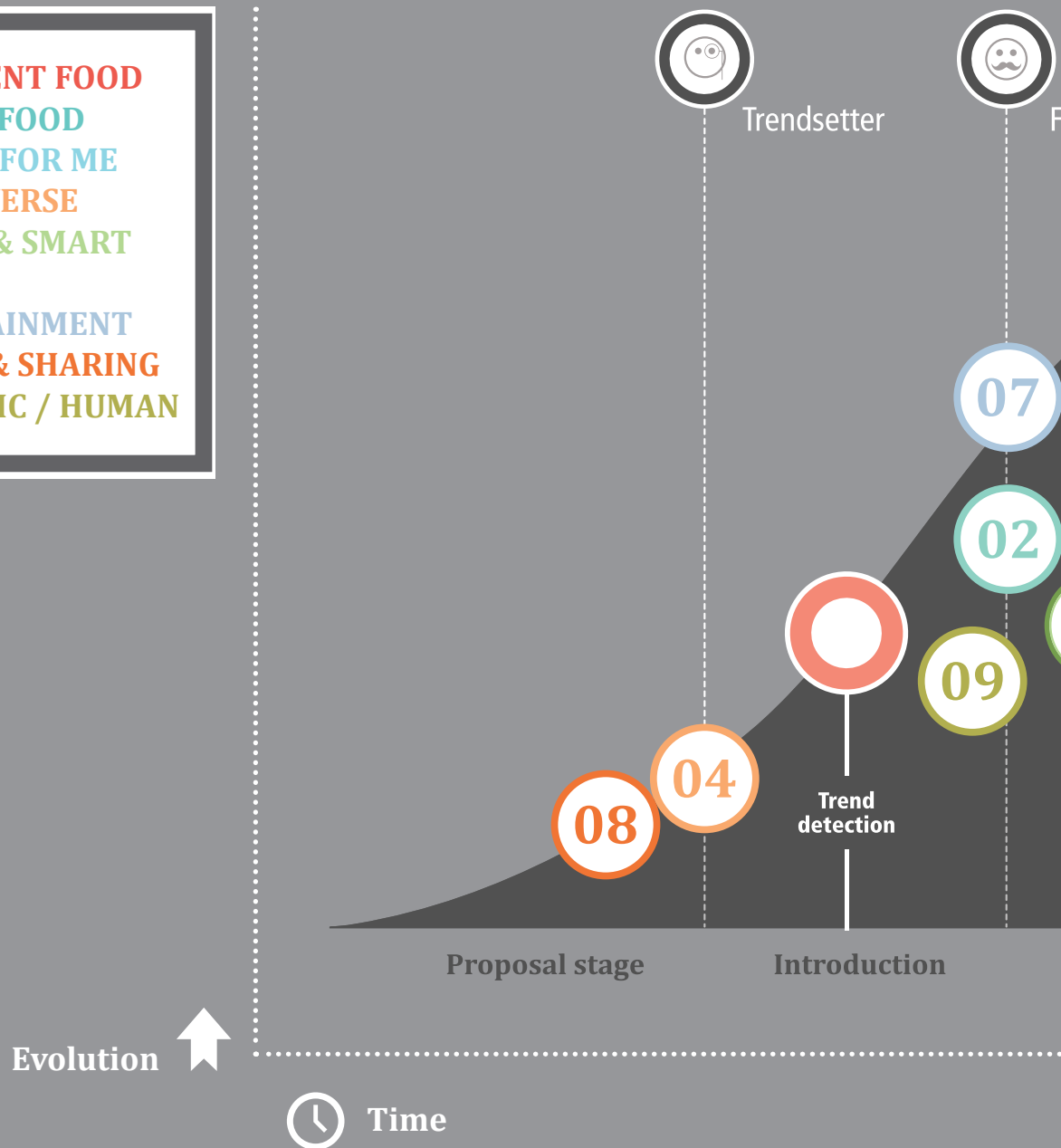


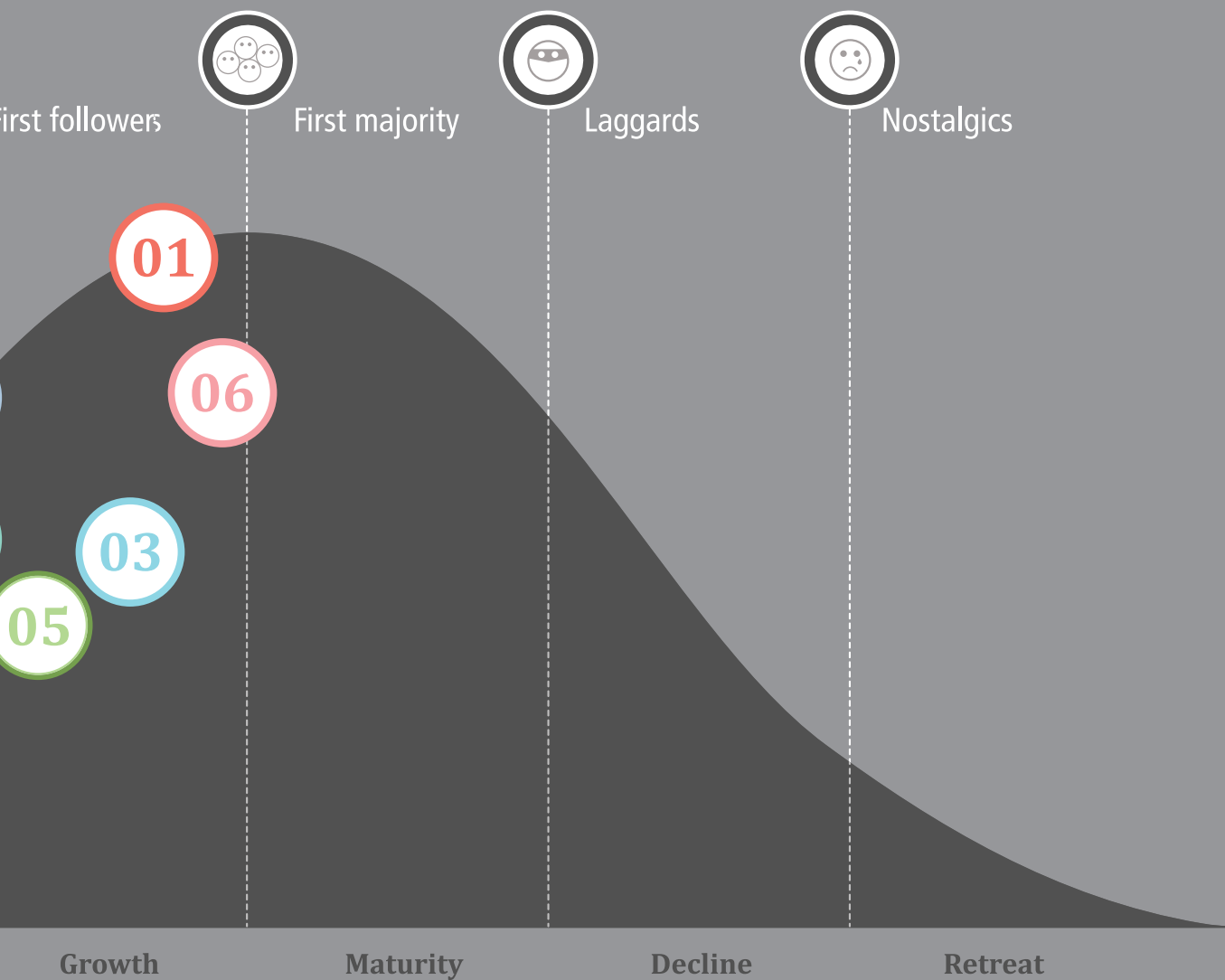
Trends are dynamic, evolving and can consolidate to become massive or remain in emerging stages as niches. The **degree of a trend following** will help to predict its potential future. The following chart shows the stage each food trend identified is at:

- **Emerging:** the trend is being introduced, starting to be detected
- **Growing:** gaining traction
- **Mature:** during the plateau phase, stable
- **Decreasing:** losing strength, fading away

Phases of each Trend

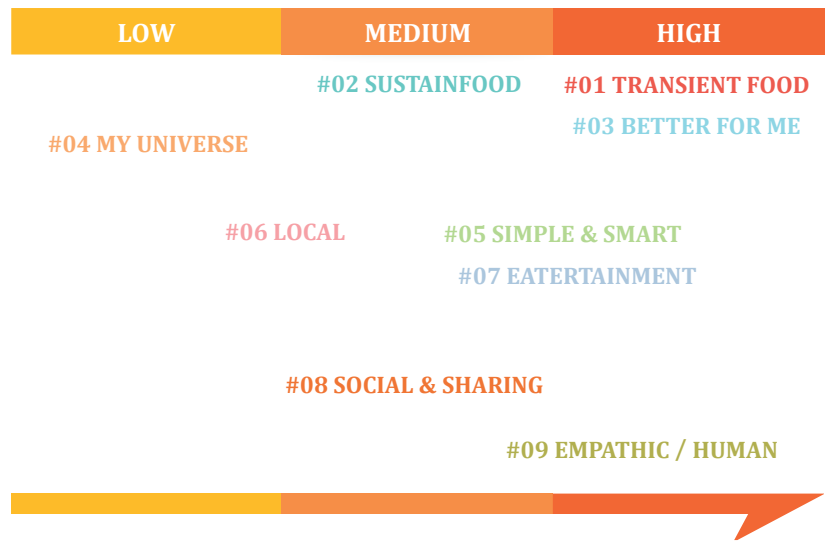
- #01 TRANSIENT FOOD
- #02 SUSTAINFOOD
- #03 BETTER FOR ME
- #04 MY UNIVERSE
- #05 SIMPLE & SMART
- #06 LOCAL
- #07 EATENTAINMENT
- #08 SOCIAL & SHARING
- #09 EMPATHIC / HUMAN





Source: Dakit

The following table shows **the consumption trend impact on the food environment** in relation to the opportunities and potential trends offer for the development of new products/ services/experiences or business models.



Trend studies provide a key part of market knowledge. The next step is to deepen and work on trends, identifying consumers connected to them and developing innovations to cover their needs and aspirations in an attractive, differential and interesting way.

What are trends for?

Food sector opportunities

Getting to know the most promising consumption trends today is a valuable guide which can help food industry professionals to devise and work out new innovative products, services and experiences.



Detect and make the most of the business opportunities which are being generated

To be up-to-date with market trends and changes in consumer behaviour may make the difference between a business success and failure. Getting to know EATrends can help us adapt to these changes and develop differentiating products and services suited to the new demands (some of them yet to be met).

**It enables us to identify innovation niches
and visualise solutions for consumer
needs not yet satisfied**



Source of inspiration for innovation

EATrends are a source of ideas and inspiration: for creativity, entrepreneurship, innovation (at product, brand, communication and distribution levels) to better understand consumer lifestyles, behaviour and expectations. Trends can help us reflect on new possibilities for our business and development of new products.

**Knowledge of future evolution in consumer
tastes and preferences is the key to identifying
entrepreneurship opportunities, re-focus our
business as well as define and implement
innovative, relevant and profitable solutions**



An input in business strategy.

Companies in the food sector can make these trends come to life and materialise in innovative products/sectors and improved communication of their characteristics and benefits, using them as a source of inspiration in strategic sessions.

2. EATRENDS

food innovation map

As a result of the work we have carried out in recent years we have transferred consumer trend research to a specific focus as the food sector. We present here existing trends and those set to change to the course of food innovation in forthcoming years. Each trend includes: an overview, associated key concepts, consumer motivation underpinning the trend and its manifestations, supported by representative innovation examples of that trend and market data.

Trends are not individual but acquire full meaning when they interact; therefore trends shall not be conceived separately as they are supported by common motivations which later materialise in different forms. These inter-connections are reflected in the **Food Trend Inter-relationship Map**.



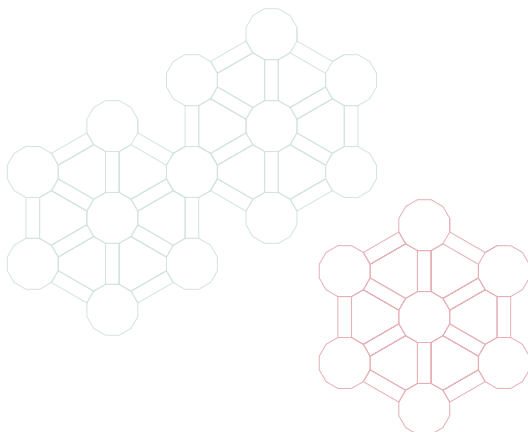
**EMPATHIC /
HUMAN**
awareness

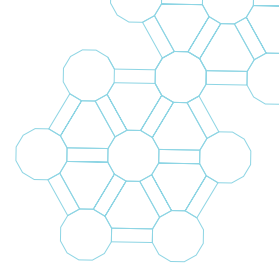
Food innovation map

**SOCIAL &
SHARING**
participation

EATERTAINMENT
food experience

LOCAL
source
matters





TRANSIENT FOOD

transient
food

01

SUSTAINFOOD

food
awareness

02

03

BETTER FOR ME

health
customised

04

MY UNIVERSE

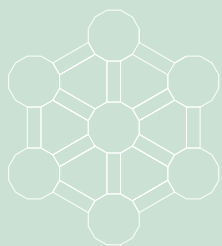
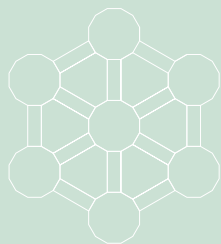
taylor made
for me

05

SIMPLE & SMART

simple
and smart



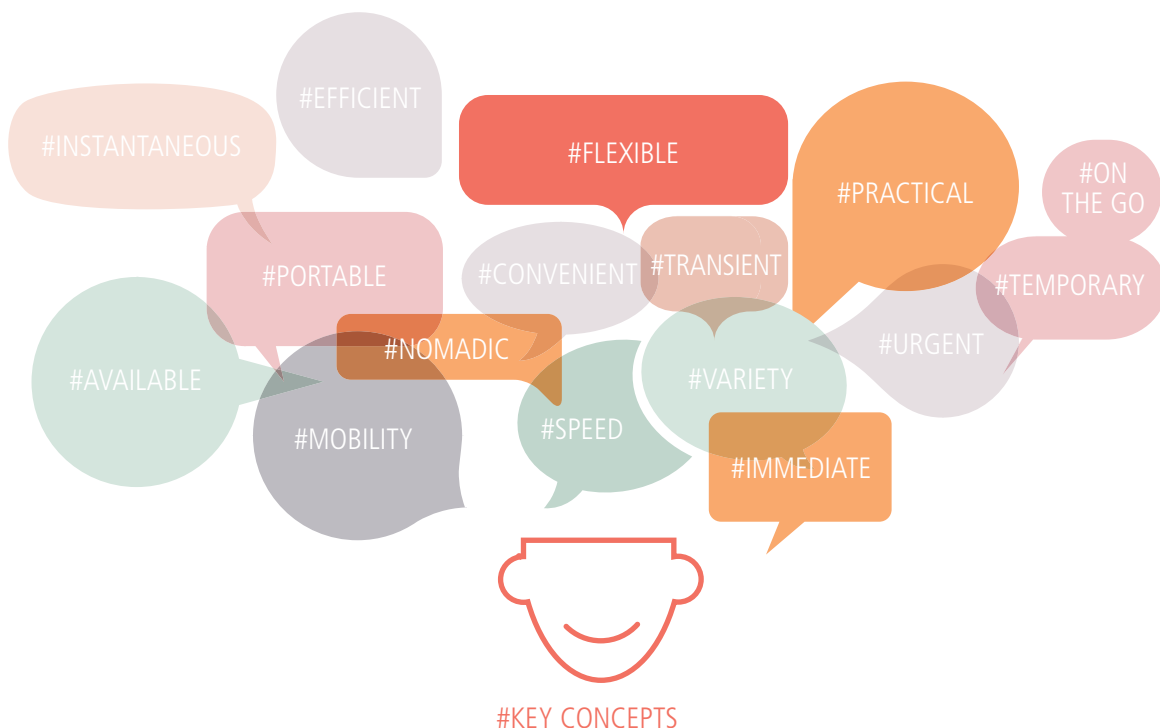




01 TRANSIENT FOOD

This is the result of the current nomadic city lifestyle and commuting (working in an office, at home, in cafeterias, etc.) which creates the need to adapt active lifestyle tasks to daily routine where time is more of the essence than ever.

This trend seeks to introduce flexibility in consumption opportunities, i.e. the practicality of efficiently meeting individual needs on the go. Favouring instant access to and almost immediate use of products and services provides added satisfaction for consumers.



TREND DRIVERS

TRANSIENT FOOD



FULFIL
needs in a precise,
comfortable, direct, quick
and effective manner

01

02

Search for
INSTANT
GRATIFICATION,
immediate
satisfaction



ACCESSIBILITY &
AVAILABILITY of products
and services anytime,
anywhere. Wide, quality
and sophisticated offer
expectations

03

04

Search for balance
between active and
healthy lifestyle:
FAST HEALTH



Optimising time
management.
RECONCILING leisure and
responsibilities plus
prioritising value provision

05

TRANSIENT FOOD



Trend manifestations

This trend materialises in convenient and efficient products and services to be consumed on the go. The snack culture is a clear manifestation of this trend whose identity traits are easiness of use and consumption on the go. Moreover, products are designed for specific consumption circumstances such as different types of breakfast *on the go*.

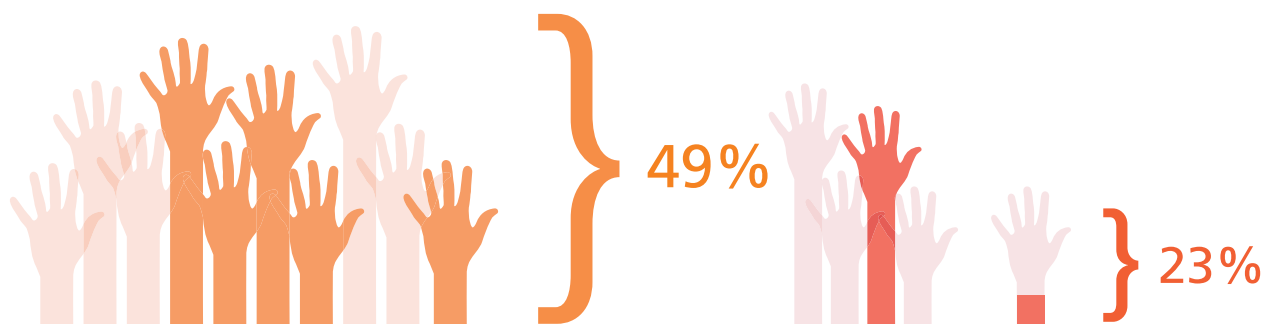
As consumers, retail becomes more nomadic. It disassociates from fixed locations and moves where consumers are. An example of this are *pop-up* vendors (itinerant and temporary) or increasingly sophisticated vending machines.



Street food provides offer diversity anytime, anywhere



Snacks in all categories, for different consumption times



49% of the Spanish population states they use vending machines. 23% of the population uses vending machines daily; peak usage times are breakfast, midday (elevenses) or tea time.

Professional Retail, 2014



Consumers spent \$347 billion on snacks per year in 2013 and 2014 worldwide

Nielsen

TREND DRIVERS

SUSTAINFOOD



Conscious and ethical consumption is the new status symbol of **RESPONSIBLE CONSUMPTION** positions in response to an excessively consumerist world

01



COMMITMENT to and **RESPONSIBILITY** for the environment and society are undertaken

03

02

The aspiration to ongoing personal improvement through the acquisition of greater knowledge and **AWARENESS** of the impact of our consumption habits and behaviour on the environment



04

Linking **ENVIRONMENTAL FRIENDLINESS** and **ANIMAL PROTECTION** to **FOOD HEALTH & SAFETY**



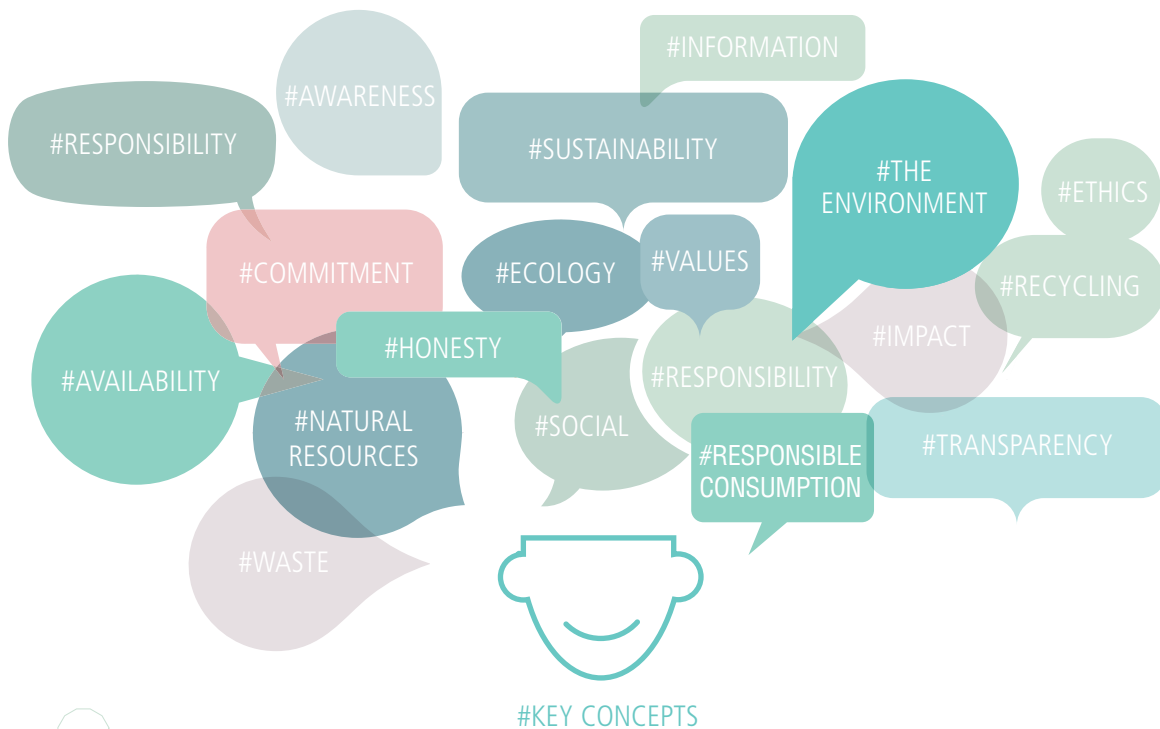
FOOD & SCIENCE

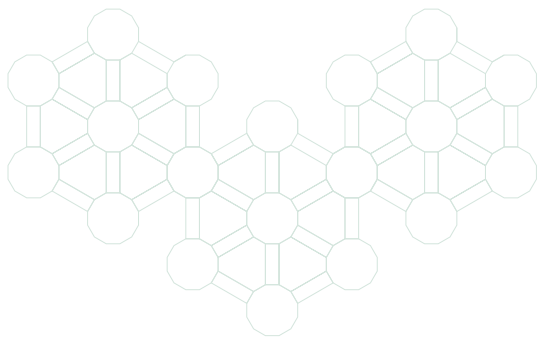
02

SUSTAINFOOD food & science

This is the result of growing consumer awareness about the direct impact of each activity (institutional, corporate or individual) on our environment. Thus the consumption background is loaded with values related to the preservation of natural resources, minimization of environmental impact from production to consumption or animal and social ethics.

This is translated into a greater demand for designing products and services which not only generate economic rewards but also benefits for society and for our planet.





Trend manifestations

Consumer demand for transparency is translated into providing information and evidence about impact on the environment and society, from production to consumption. This is expressed in the proliferation of logos and statements supporting sustainable credentials for products and services which pose a truthfulness, honesty and credibility challenge. Tracking-traceability systems have the same aim, generating the possibility of following up a product throughout the entire chain, up to consumption.

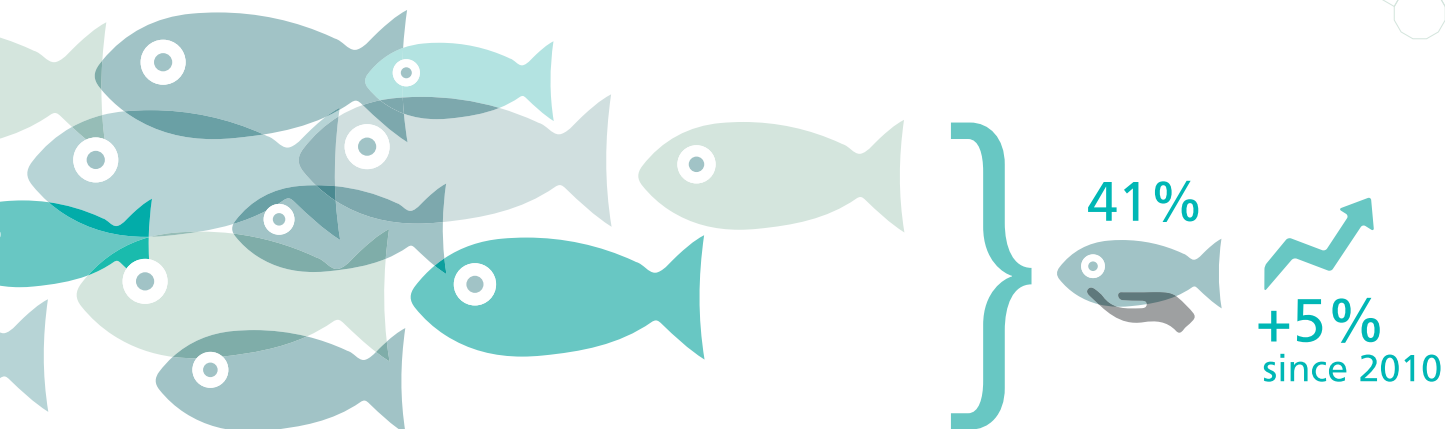
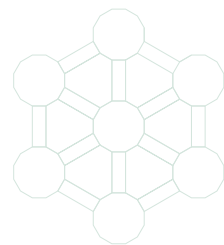
Movements around circular economy (a more regenerative vision of creating, using and providing products) materialise in waste recovery and recycling, second-hand or repair market, as some representative examples on this trend. More specifically in the food environment, the trend is expressed as a proliferation of initiatives around food waste and by-product recovery, increased number of vegans or flexitarians (who opt for products with smaller environmental footprint among other issues) or the return to bulk to minimise packaging consumption.



Snacks made from insect flour, the future sustainable protein?

From food waste to compost with social and local targets





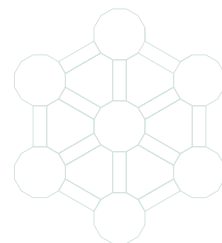
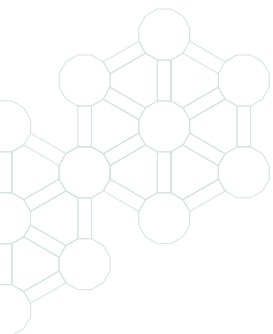
2 in 5 consumers worldwide (41%) actively search for fish produce from sustainable sources; this represents a 5% increase since 2010.

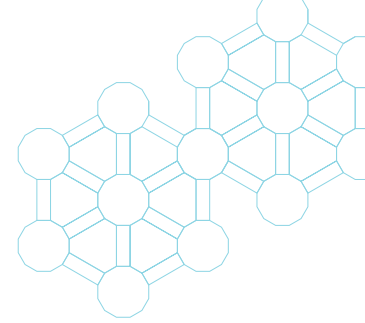
Marine Stewardship Council, 2014

Sustainable brands
have experienced
7% increase in 2014
which represents a growth
9 times greater than that of
non-sustainable ones

"Sustainable Brand Market in Spain"

ICAI-ICADE and Nielsen, 2014

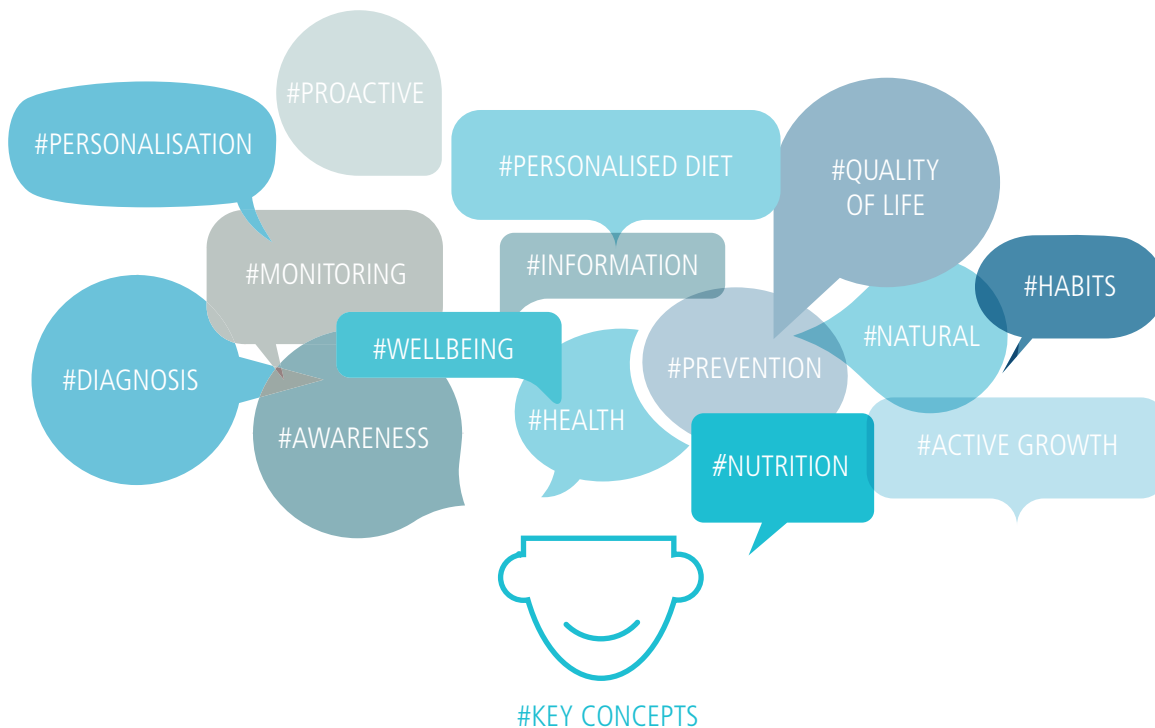




03

BETTER FOR ME personalised health

Quality of living with optimal health and wellness is one of the basic desires of human beings. Healthy and active growth is the major challenge in society today, which is translated into a desire to have greater knowledge and awareness regarding our state of health and boosting consumer proactivity towards individual health management, supported by higher technology and greater access to real time information. All of this with a clear focus on customising diet, lifestyle habits and consumption.



TREND DRIVERS

BETTER FOR ME



The desire to permanently live in **HEALTHY CONDITIONS** and wellness to have the lifestyle desired

01

02

PROACTIVE AND RESPONSIBLE ATTITUDE towards the promotion of health with food intake as the major role Search for diet patterns adapted to personal needs



Self **HEALTH-MANAGEMENT**: search for knowledge and a feeling of control in the prevention, preservation, improvement and monitoring of personal health

03

04

Achieve a balance between physical and psychological/emotional **WELLNESS**



PERSONALISED HEALTH



e-health

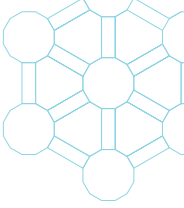
Health will be one of the **most** dynamic categories in **consumer expenditure** until 2030. The **e-health** market is expected to be worth about **€30 trillion** by 2020

European Commission



During the 2013-2014 period, global sales of health and wellness industry products increased by 6.5%, amounting to \$774 trillion. Main demands: natural and functional.

Euromonitor International, 2014



Trend manifestations

All high-consumption sectors are investing in the development of solutions designed to maintain quality of life through a healthy active lifestyle. Moreover, companies and institutions of different types are becoming increasingly involved in motivating and encouraging consumers to achieve that desired optimal state of health. All of this is added to the boom of “e-health” devices which are making the control and monitoring of individual health available to all.

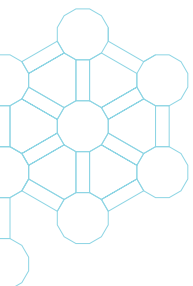


Image and food: products for consumers who look after themselves inside and out

Within the food scope, personalised diets focused on the design of food concepts that prevent and/or correct nutritional deficiencies in people during periods of growth and ageing are gaining momentum. Other strategies continue to be oriented towards the functionality supported by science-based health claims, “free from” formulations or the design of products with inherent and natural functionality.



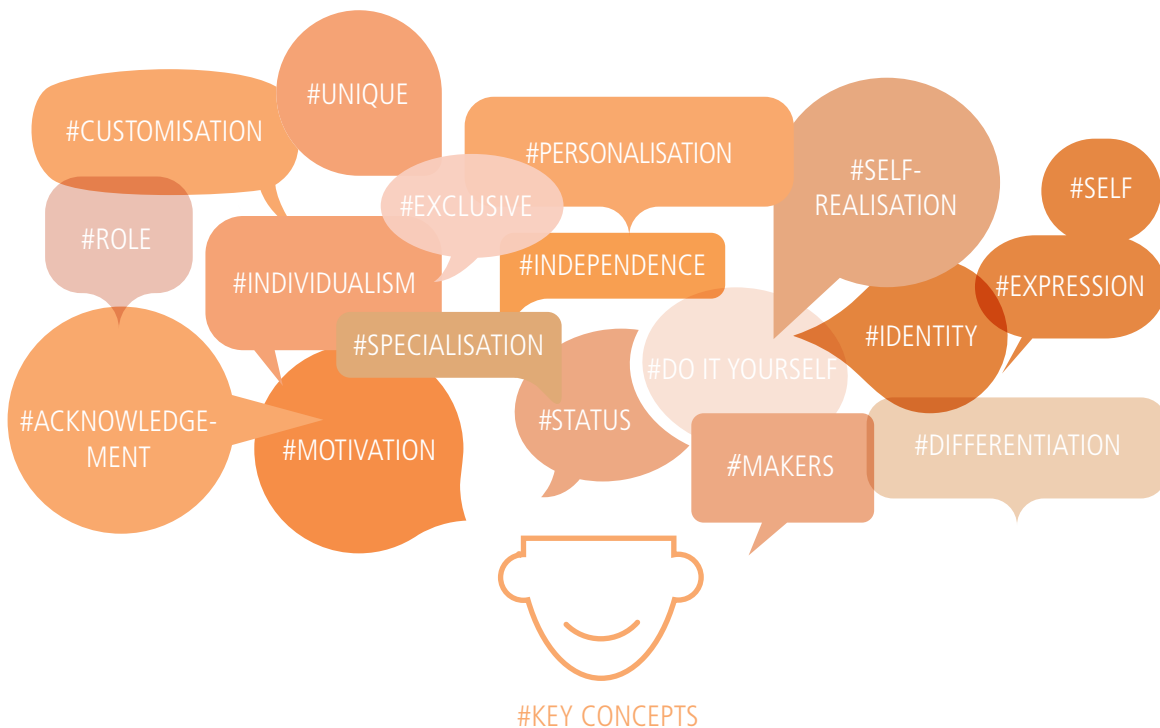
Range of digestive friendly products, for sensitive stomach-bowel consumers



04 MY UNIVERSE tailor-made for me

Each person is unique and we have the desire to express our identity as well as being acknowledged for the way we are together with our individual likes and dislikes. In sum, we pursue a space in the social sphere, a status. The consumption universe turns into a declaration of identity through the goods, services and experiences acquired.

Consumers are more proactive than ever to individuality and expression which results in the demand of personalised products, services and experiences in an easy and agile way. The online world is nurturing this trend where we are exposed, express ourselves and customisation is easy and accessible.



TREND DRIVERS

MY UNIVERSE



Show our OWN PERSONALITY (character, likes and values) in an increasingly global and impersonal world

01

02

WE LIKE what we feel is "OURS", fitting with my personality (as well as my needs) and with which I am identified



Be PRESCRIPTOR/PROSUMER: being proactive in consumer communities and even interacting with companies

03

04

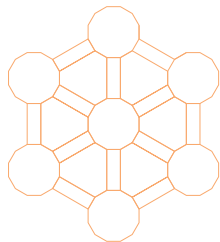
Personal improvement aspiration which translates into SEARCHING FOR KNOWLEDGE or developing new capacity and skills



We are SOCIAL BEINGS with the need to be acknowledged by others

05

TAILOR-MADE



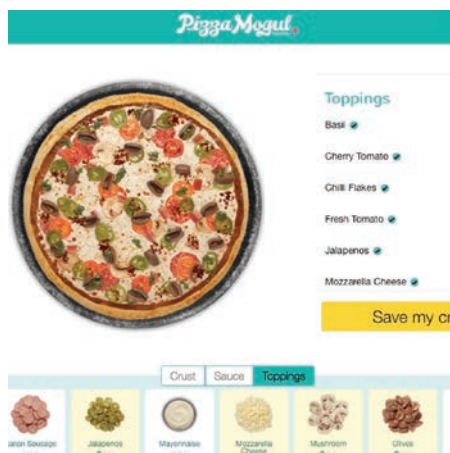
Trend manifestations

Products, services and experiences are moving towards more specialised offers: mass production is becoming mass customisation. Manufacturing technologies increasingly enable production line shortening and adaptation, as tools and platforms enabling post-production customisation arise. 3D printing is a clear example of technology evolving in the customisation field.

Furthermore, the online world offers a wide array of customisation possibilities in a participatory highly accessible way to consumers themselves who take control of their own products almost as if they were manufacturers, which in turn gives them freedom to experiment.

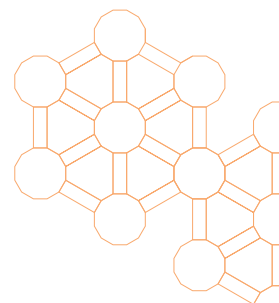


Colour and customise your biscuits before you eat them or give them as gifts



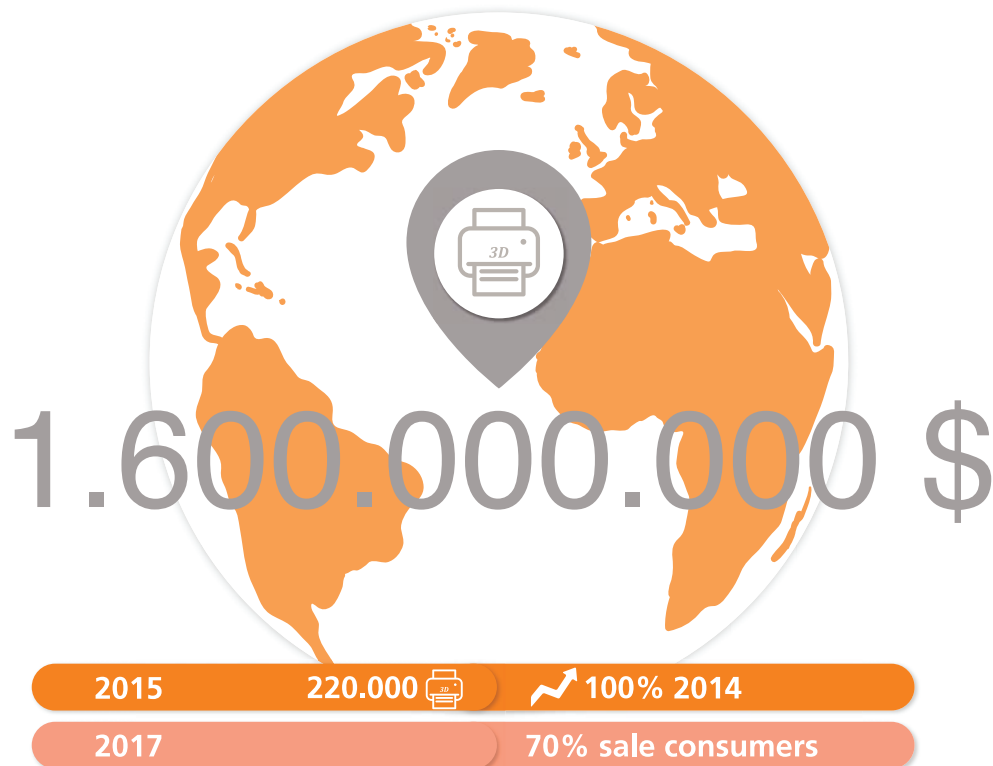
Design and even earn money with your new product proposals

Within the food scope, the *foodie* phenomenon associated to the growing interest for acquiring knowledge about the world of food and making one's own developments, is promoting the launch of products, services and experiences oriented to these consumers. Another relevant manifestation of this trend is the increase in *Kits* and devices to design and produce your own food and drink at home.



“Do It Yourself” opens the door to multiple appliances and devices at home, where consumers are turned into **small producers** and designers of their own food

“The Food Revolution” Lantern papers, 2014

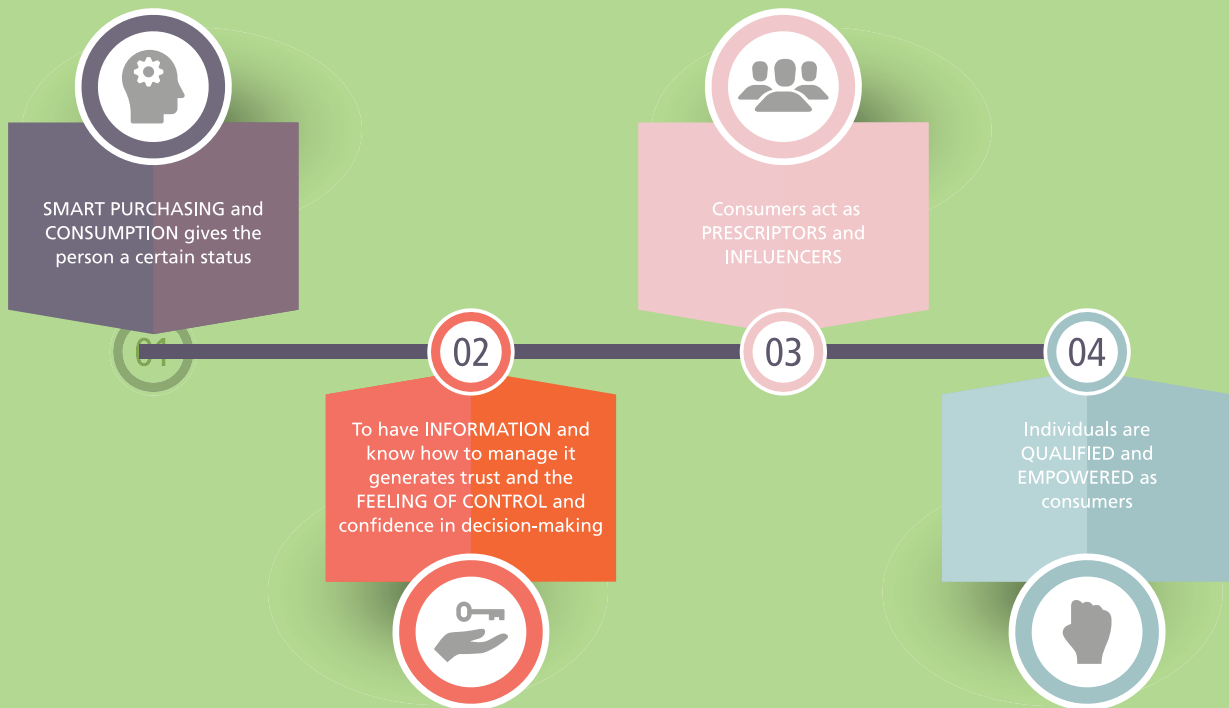


In 2015 almost 220,000 3D printers will be sold worldwide, for a value of \$1.6 billion which represents 100% growth in relation to 2014. By 2017, almost 70% of these units will be sold to consumers.

Deloitte

TREND DRIVERS

SIMPLE & SMART



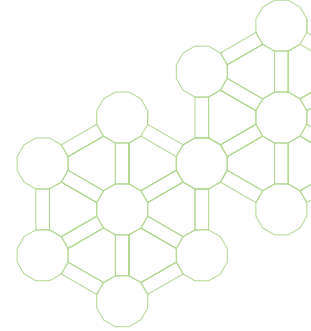
SIMPLE & SMART

05 SIMPLE & SMART

In view of the accessibility and over-exposure to products, services, experiences and information, the current challenge is to simplify and be effective, facilitating smart management for consumers to achieve the best option. The capacity to monitor and manage each aspect of our lives places consumers in a more demanding situation and empowers them for decision making. In this way, control and trust is returned to citizens to decide and act on what is convenient for them or of interest to them.

This is how the demand for flexible, smart, accessible solutions which save time and help the consumer to make their lives easier, is born.





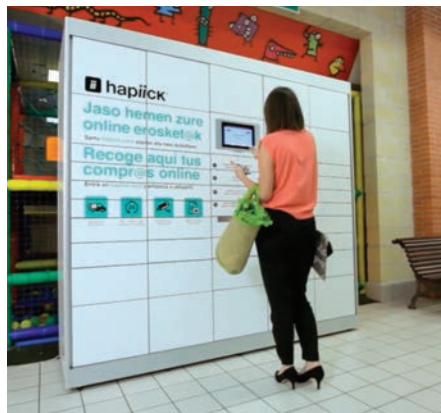
Trend manifestations

We will be increasingly connected to home appliances and any type of portable device which will be integrated in our lives. Devices enabling us to monitor and manage life from different perspectives will also equip us to select more customised products, services and experiences.

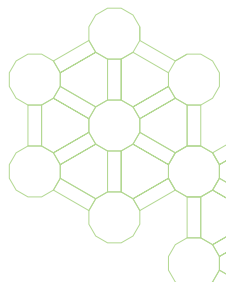
In addition, spaces (*online/offline*, home/outside home) are becoming more flexible and hybrid *retail* initiatives where food can be consumed and clothes can be bought on the same premises are also emerging.

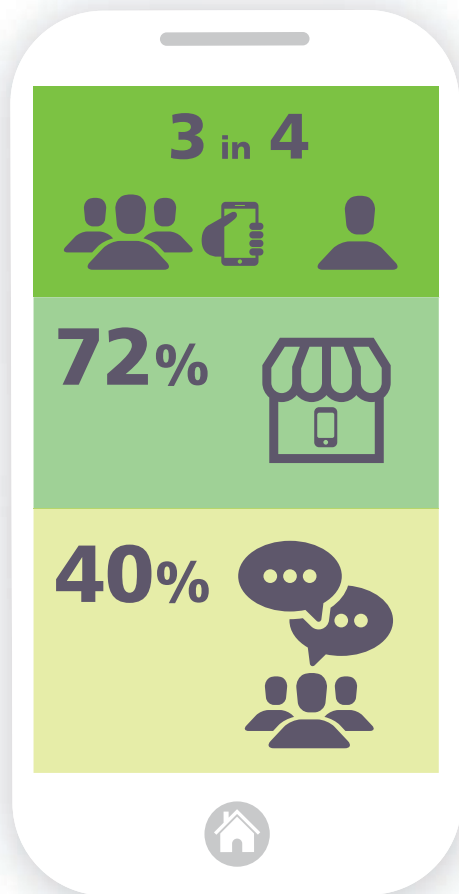
Collaborative platforms where citizens act as influencers of products, services and experiences are another clear manifestation of this trend.

In the food scope, the search for continuous convenience remains unstoppable, with products and services which make life easier or packaging bearing smart labels to provide fast, visual and intuitive information.



Freedom and flexibility to collect online shopping



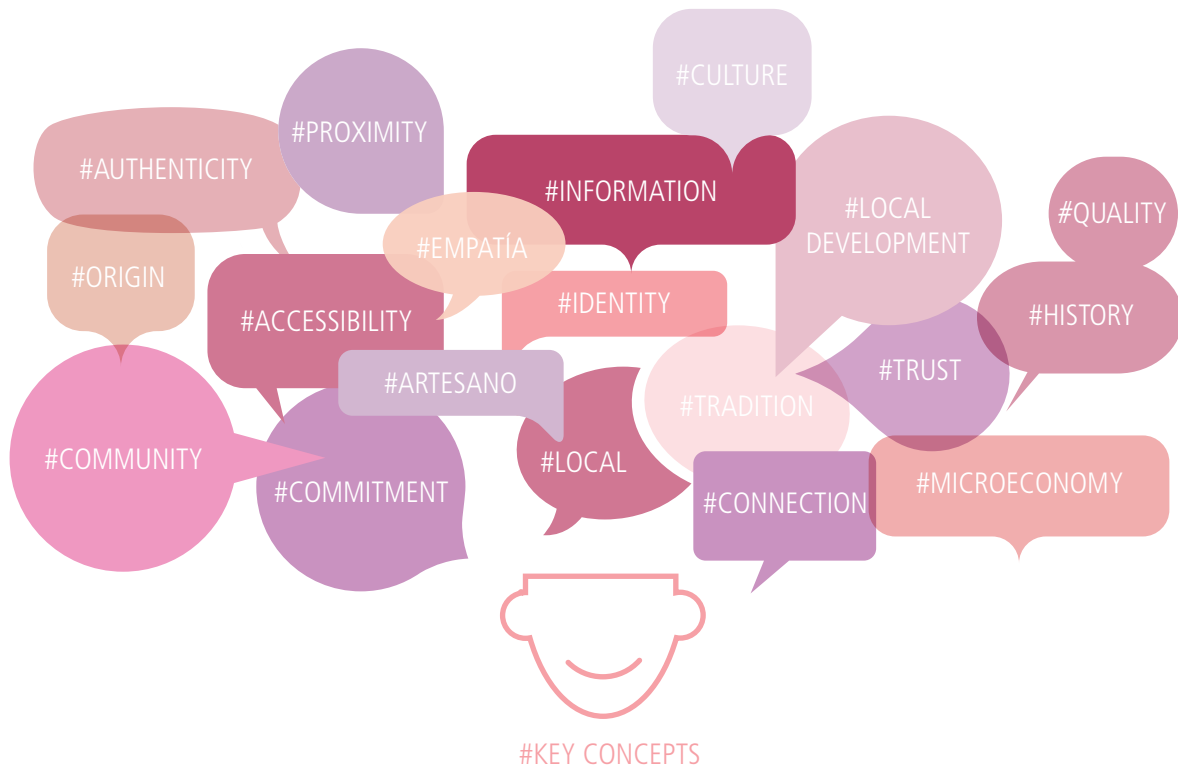


Nielsen 'Global consumer distribution channel preferences', 2014

06 LOCAL source matters

Despite globalisation, the online world or growing mobility, the local scope is emerging where source (city, region or territory) takes centre stage. The local scope has accessible, tangible and proximity connotations which call for a more emotional consumption and promotes a more transparent relationship between the consumer and the different food chain links.

The feeling of identity, authenticity, belonging to a community or ecological and social awareness underlie and converge in this trend.



TREND DRIVERS

LOCAL



Local consumption represents **STATUS** and **COMMITMENT** to social, economic and natural environment

01

02

The feeling of **IDENTITY**, belonging associated to origin



PROXIMITY and connection to food production

03

04

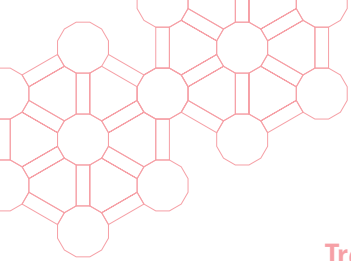
More **AUTHENTIC** consumption of more limited access providing **EXCLUSIVITY** to consumer experience



Search for **TRUST** and **SECURITY** in what is closer

05

SOURCE MATTERS



Trend manifestations

This trend is manifested in products, services and experiences which establish a more direct link between food consumers and those producing them. For example: local product consumption communities or co-operatives, the booming on local markets (both offline and online) or greater visibility of producers through own products (packaging and labelling). In this regard, tourist gastronomic initiatives linking territory-product-producers are also on the rise.

Most consumers purchasing food and beverage products in the USA, take two factors into consideration: product freshness and support for local economies

Mintel Report

"The Locavore: Attitudes Toward Locally-Sourced Foods – US", 2014

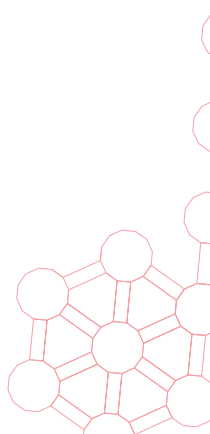
The seasonable nature of products is recovering value and all initiatives aimed at promoting more authentic and limited access consumption are ultimately generating a more exciting and desirable consumption experience.

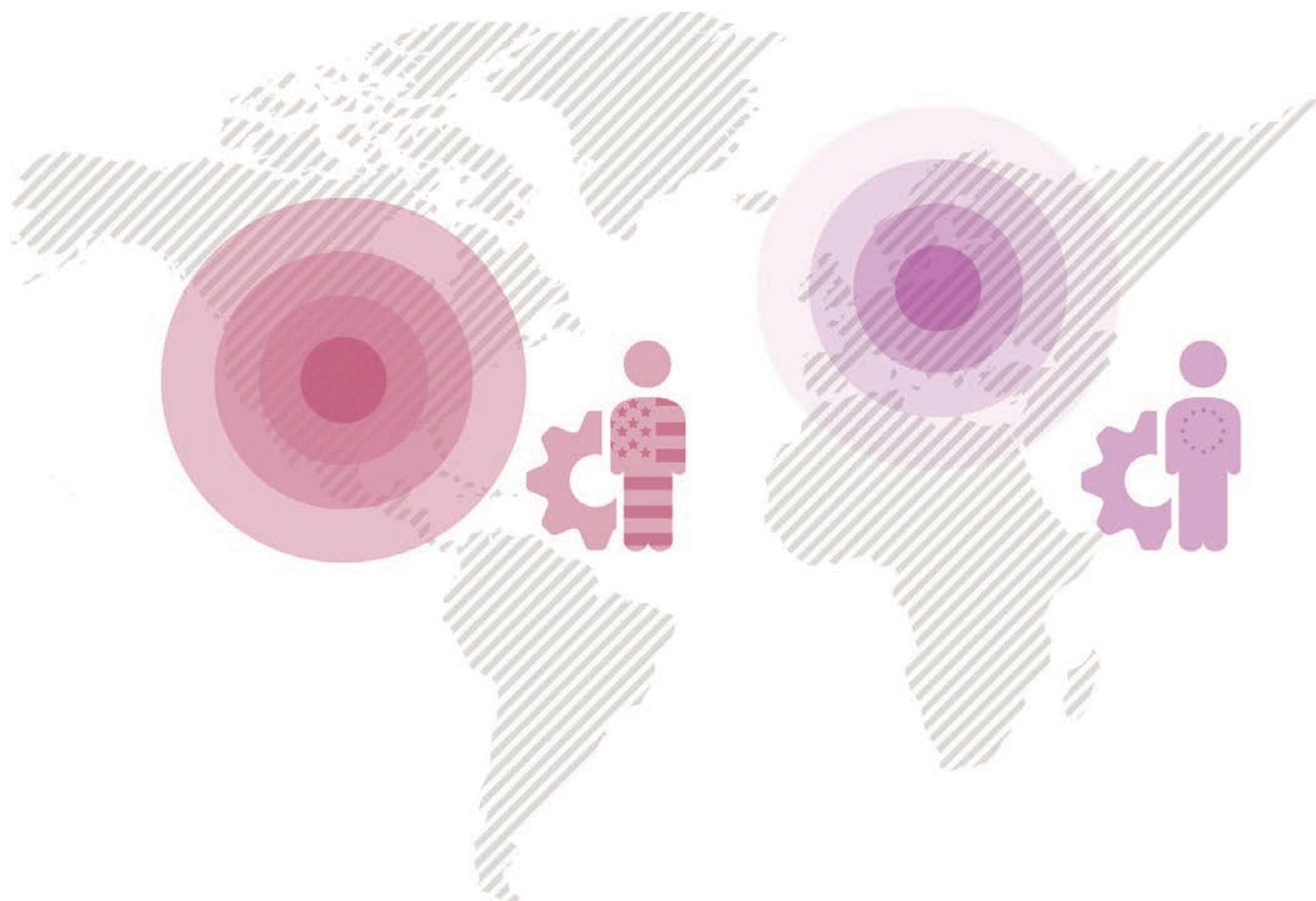


Homage to Alava (Basque Country region), through raw materials, producers, artisanal processes and local gastronomy



Mexican artisanal product of pre-Spanish inspiration





Customers in the USA and Europe in particular are increasingly looking for food made by local producers and artisans.

"The Food Revolution" Lantern papers, 2014

TREND DRIVERS

EATERTAINMENT



Break out of routine and
indulgence to ORIGINAL
and MEMORABLE
EXPERIENCES

01

02

INNATE ATTRACTION to
new and different
things



Fun, SURPRISE and
game get consumers
hooked

03

04

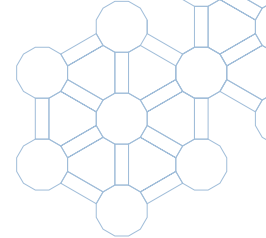
Searching for an
EMOTIONAL FEELING of
happiness, relaxation and
excitement



Food becomes more
ASPIRATIONAL, related
to our more hedonistic
side

05

FOOD EXPERIENCE



07

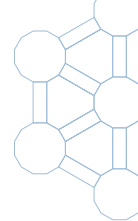
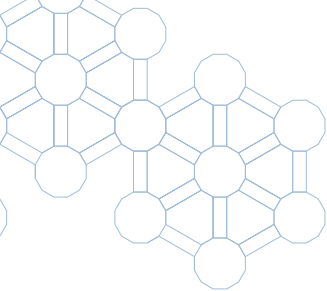
EATERTAINMENT

food experience

As human beings are by nature explorers, attraction to novelty is innate for us. However, playing enables consumers to build more emotional links with products and services as it connects to core needs and desires such as feeling realised by the achievements made, interaction and competitiveness, reward satisfaction, etc.

If we take into account that we live in the 'experience economy' the challenge consists of creating unique and memorable experiences rather than "products and services". Exploring and playing become part of consumer experiences to make them more pleasurable, enjoyable and fun.





Trend manifestations

This trend materialises in creating experiences beyond a mere product or service but aiming at involving the consumer in a more playful, shocking and emotional way. The unexpected, a surprise, fun, entertainment and active participation by consumers in the experience will be the winning features.



Sweets which explode as you put them in your mouth or your beverage

This trend merges initiatives from encouraging action and experimenting ("do it yourself"), to *pop-up* premises which add surprise, urgency and exclusive access, creating more exciting consumption experiences.

In the food scope, senses take centre stage. Stimulating and playing with senses creating sensorial experiences with products, tastes or textures which are not what they look like, both through the product itself as well as via increasingly interactive packaging with multiple uses, customised or even edible.



Hybrid perfume/drink concept: drinkable perfume, a beverage designed by a perfumer



75% of Spanish consumers said they like trying new products and 70% are willing to pay more for products they find attractive. The most interested consumers are those aged between 35 and 44.

IRI, "Gran Premio a la Innovación" (Innovation Awards) study, 2014

TREND DRIVERS

SOCIAL & SHARING



The FEELING of
BELONGING to a
community also rewards
us as individuals

01

02

People as SOCIAL
BEINGS look to be
respected and
acknowledged by others



SHARE KNOWLEDGE
in the common
interest to be a
prescriptor and
influencer

03

04

PERSONAL FULFILMENT:
to feel useful, participate
and act



Demanding a change in
the traditional order
system: consumer
EMPOWERMENT

05

PARTICIPATION

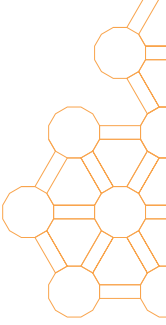
08

SOCIAL & SHARING participation

We progress towards participatory culture largely encouraged by the crisis of values and existing social disenchantment but also because human beings are ultimately social creatures. Technology has taken this phenomenon to a more globally agile and accessible scale, with more options than ever for sharing and connecting experiences and knowledge. Connect, express an opinion, participate, discover, offer, learn and develop new abilities, both among friends and with unknown people, underlie this trend.

New ways of involvement, expression and citizen collaboration make a more gratifying democratic alternative in the consumer sphere, giving more voice, capacity to act and power to consumers to change things for common improvement.





Trend manifestations

This trend materialises in multiple initiatives where consumers are increasingly entering more and more aspects related to business, corporate and brand spheres. The traditional gap between those consuming and those producing is closing due to new tools, platforms and products being developed.

New business models where consumers “create” are the hub for *start-ups* booming as well as other business models focused on community participation culture and cooperation innovation (*crowd-sourcing* and *crowd-funding platforms*).

Furthermore, collaborative consumption initiatives implying changes to purchasing habits and ways of accessing goods and services based on sharing, renting, and other means of removing the middle man, are another clear manifestation of this trend.



1 in 4 Spanish consumers feels aversion for large companies and corporations leading the market economy and part of the capitalist system. The citizen looks for solutions in society and as a result collaborative consumption has emerged

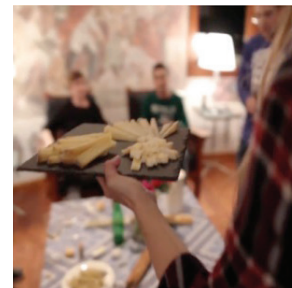
MyWord, Mikroskopia, 2015

Profit generated by collaborative consumption platforms will exceed \$3,500 million in 2015, with an annual growth of 25 %

Forbes



Community for the exchange of food waste before is thrown away



Local ambassadors, socialisation
tourism through food culture

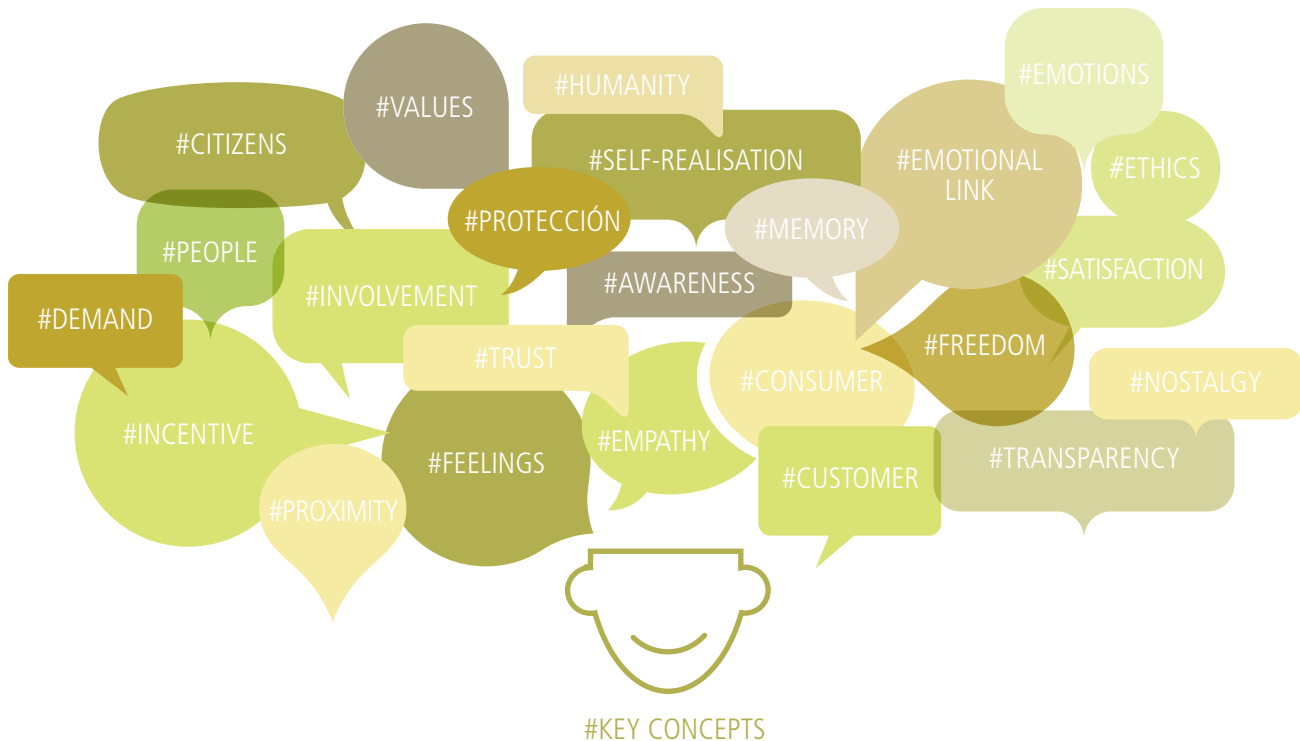
09

EMPATHIC / HUMAN awareness

Every day more and more people want their more emotional and human side, aspirations and needs to be taken into account as first and foremost we are people and then consumers. Individuals look for more empathy and humanity in brands and companies, greater closeness and connection to their reality, something they can feel and identify with. The traditional rigid and strict corporate world is failing to cater for those searching for something genuine, more natural, spontaneous and flexible,

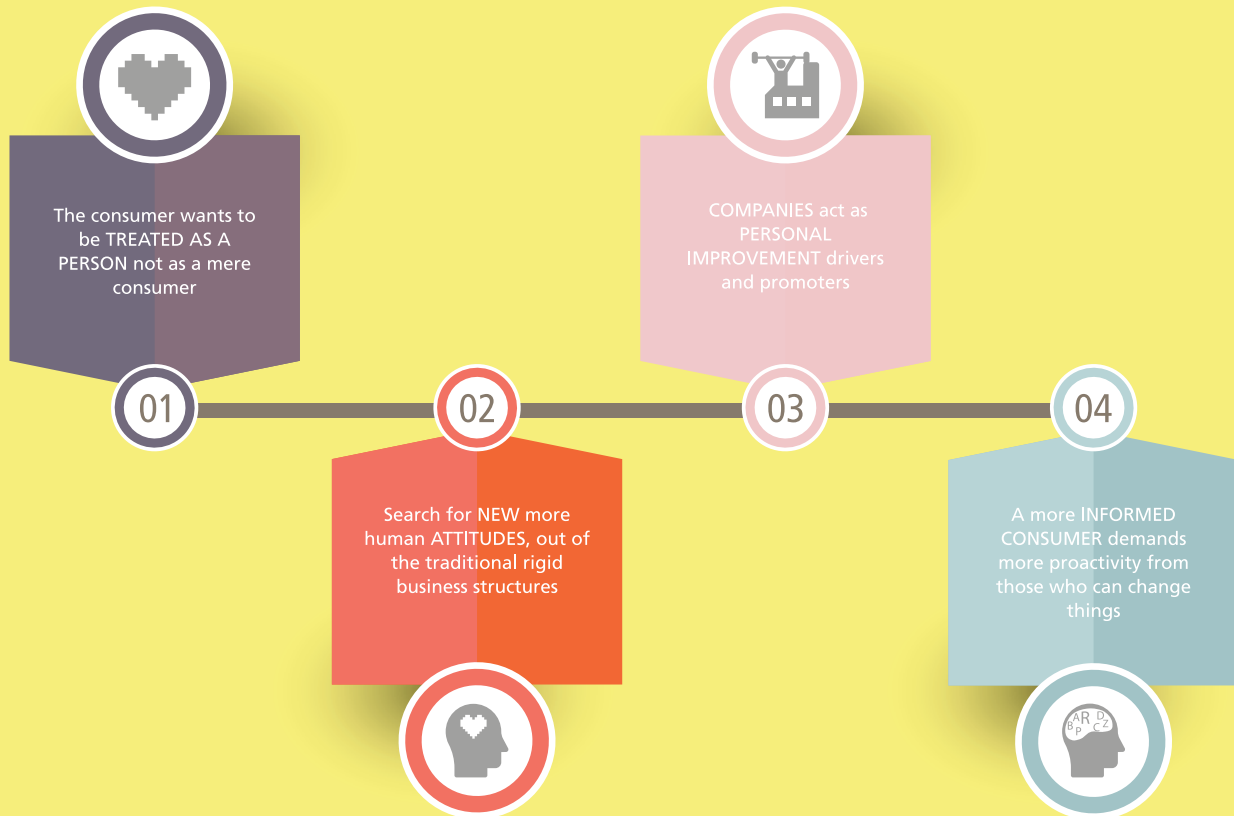
Therefore this trend looks for new links between citizens and companies generating transparency and trust, and even moving and encouraging them towards their personal development or to acquiring new knowledge and skills. Thus, consumers demand greater involvement from governments, institutions and companies within a collaboration framework with society to foster positive change.

Consumers will support open, honest, empathic, generous, involved (and even more fun) companies and brands.

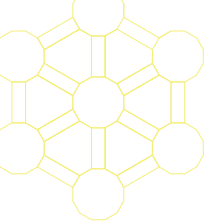


TREND DRIVERS

EMPATHIC/HUMAN



AWARENESS



Trend manifestations

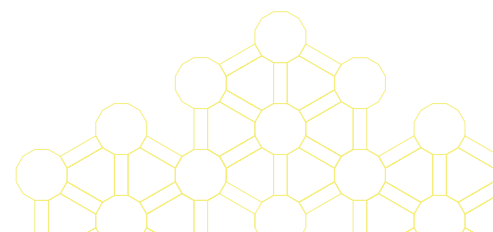


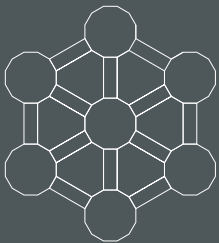
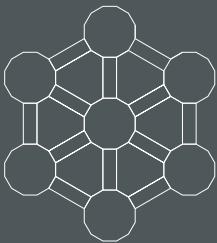
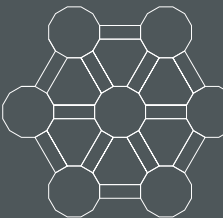
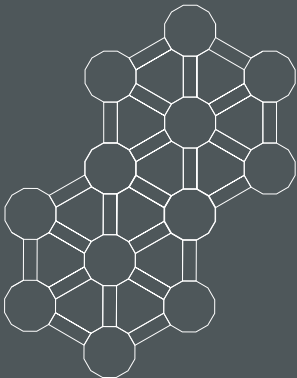
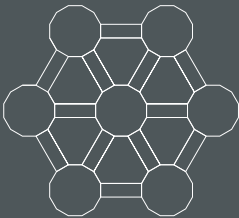
Brands and companies are making efforts to connect to their personality and build customer loyalty in more human terms: speaking the same language and generating trust.

The link between consumers and brands/companies through stories provide added value to products, services and experiences. More 'friendly' services contributing to knowledge improvement and generating trust or involving consumers in a closer manner, will provide further gratification consumers will be unable to turn down.



More social friendlier banks

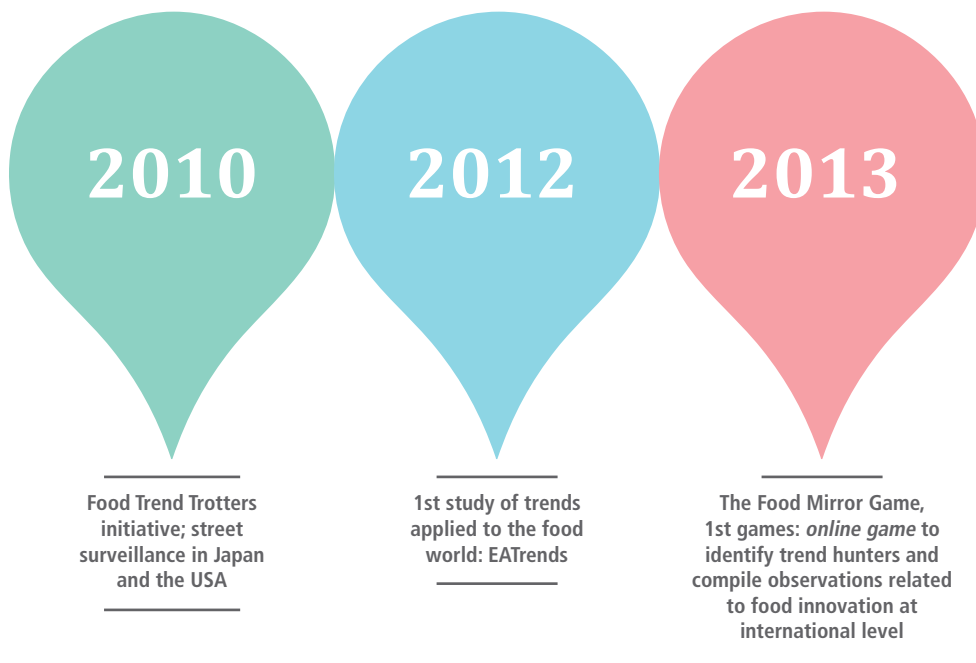




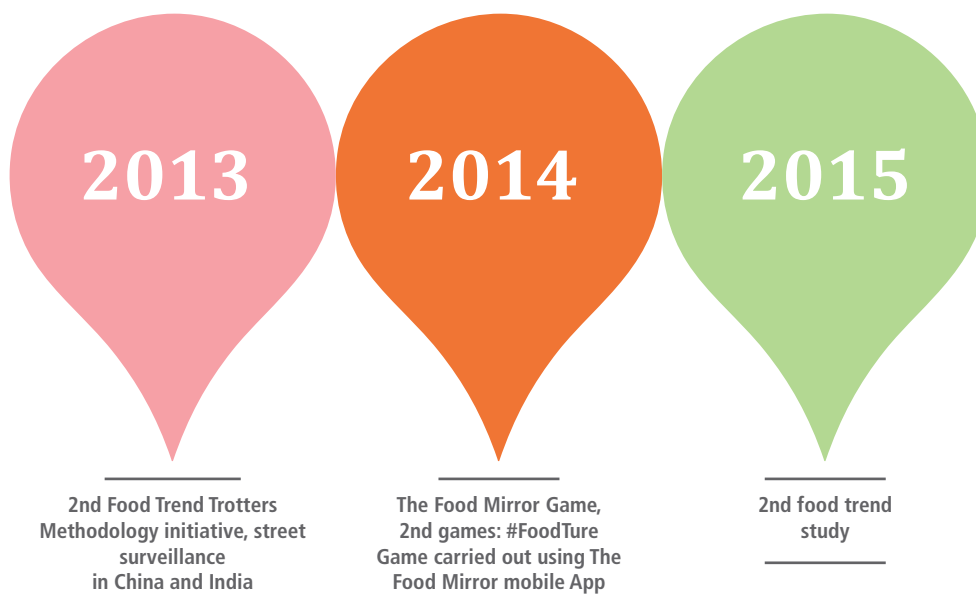
3. STORYTELLING: EATrends making-of

Food trend identification study starts with market research activity (*desk-research*) where compiling information (data) is the main activity and observation (*coolhunting/trendhunting*), and surveillance as well as active listening take centre stage. Many of these tasks are carried out within the framework of street surveillance projects *Food Trend Trotters*, our internal AZTI *Spotters* (trend hunters) and two “*The Food Mirror Game*” games for food innovation collection.

The next phase involved the analysis **and interpretation** of data collected during research to achieve the first formulation of trends. Finally, the **contrast or validation phase**, where pre-defined trends are placed in context while evidence and data supporting those trends are found, takes place. To validate EATrends, work sessions were held with AZTI experts in different disciplines, as well as a team of outsourced contrast.



Since monitoring during recent years, some of the EATrends identified in 2012 essentially remain unchanged, although some of their manifestations have evolved more powerfully while some have merged and reformulated, and others have emerged. The second trend exercise complies with trends which are and will be critical for the food sector in forthcoming years.



4. ACKNOWLEDGEMENTS

EATrends are the result of strategic applied research work by AZTI, an expert organisation in marine and food research, to provide their customers with integral and innovative solutions.

The project was led by Sonia Riesco, expert in Business Intelligence at AZTI who for the last five years has been in charge of the Observatory of Trends and Innovation at this centre. Within this framework, research projects regarding consumption trends are designed, applied and integrated in food innovation processes.

However, EATrends would not have been possible without an ecosystem of co-operators who have been involved in the process, feeding it and making it greater. Throughout our journey, the following have been our travel companions:

The original *Trend Trottersteam*, which are part of MIK (*Mondragón Innovation & Knowledge*): Asier López and Iván Marcos, who along with our communication experts David Martínez and Raúl López de Gereñu helped make the first Food Trend Trotters steps come true.

Part of former *Bilbao Design Academy* team: Leire Gandarias and Jeroen Duijvestijn (currently Trendlab), who guided us through the first journey towards the study of trends.

Our students undertaking the Entrepreneurship and Innovation Leadership *degree* at the University of Mondragón: Jon Ander Musatadi and Patrizia Vitelli, who brought us closer to Chindia.

Nagore Picaza, at the Trend Observatory of AZTI, who co-operated throughout the EATrends research process.

Our internal team at AZTI *Spotters* (trend hunters): Eneka Labriska, Josune Ayo, Begoña Prieto, Carlos Bald, Begoña Alfaro, Monica Ibargüen, Mikel Orive, Irene Peral, Sandra Rainieri, Yolanda Ríos, Itziar Tueros, Begoña Pérez Villareal, Kepa Escuredo, Clara Talens; and AZTI-Mugaritz R&D research team: Gema Serrano, Igor Cantabrana and Tatsuya Iwasaki. Everyone made an effort to go out day after with their senses keened to food innovation capture and sharing.

Our splendid winners in both games *The Food Mirror Game*: Isabel Hormaeche, Helena Vaello, Beatriz Sánchez, Ruby Garroville, Fabiola de Goribar and Elena Ubeda. Fantastic foodies and loyal followers of the project.

The entire community which takes part through The Food Mirror mobile App. sending us food trends from every corner of the world and sharing their findings.

Our outsourced contrast team who have given us different visions in the final contrast and validation stage: Marce Masa (Adimen Investigación), Dani Lasa (Mugaritz), Oskar Santamaría and Ainara Atorrasagasti (Dakit Design), Ana Roquero and Thibault Paoulou (Cookplay), Helena Vaello (Guía Repsol), Susana Perez, Alberto Espinel, Isabel Lazaro and Jorge Martínez (Calidad Pascual), Carolina Najjar (Eroski), Eduardo Sanfilippo (Grupo Consorcio), Iñaki Vidaurrezaga (Café Fortaleza), Santiago Sala (Grupo Apex), M^a Soledad Aguirre and Andrés Araujo (University of the Basque Country) and Olga Gómez (Innobasque).

**Thanks you all very much for your patience, involvement and excitement
at each step along the way.**





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