

Flavor Chase: 2025's Most Disruptive Food & Beverage Trends



Letter from the CEO



As we step into 2025, I'm inspired by the forward-thinking work of our clients. The brands that feed the world are making bold decisions in the face of unprecedented change; they are not just staying ahead of the curve—they're defining it.

At Tastewise, we're proud to support these efforts with AI-driven solutions that allow brands to act quickly and with precision, understanding not just what consumers want, but **why** they want it.

The food and beverage trends ahead of us reflect a rapidly changing landscape.

Personalized nutrition has taken on new urgency in the post-COVID era. Innovations like GLP-1 drugs are shifting how we think about what we put into our bodies, and new health considerations are impacting decisions around sustainability.

Hydration is gaining importance as consumers prioritize functional, wellness-driven choices. And global flavors are more accessible than ever, bringing a rich diversity of tastes to everyday eating.

At the core of these trends is a more educated and demanding consumer base; today's consumers expect brands to understand their deeper motivations and deliver products that align with their values.

This report is designed to help you do just that, leveraging the speed and scale of AI to anticipate what's next and deliver solutions that matter.

I am excited to share our 2025 Trend Predictions report, and look forward to continuing this journey of innovation together.

All the best for 2025,

Alon Chen

CEO & Co-founder, Tastewise



2025's food & beverage trends

Versatile ingredients

- Hawaii upgrades coffee culture
- Black lime powers up condiments




Sustainability

- Transparent carbon labelling
- Wine, soil health, and the gourmet experience



Hyper-personalized Nutrition


- Hormone regulation finds a new audience
- The post GLP-1 era





Cuisines

- Gen Z meets Filipino cuisine
- Asian street snacks at the office



Hydration Heroes

- All night hydration power plays
- Celtic salt beyond TikTok

Our methodology

What people want on their plates changes fast. To stay ahead, we dive into the deeper motivations behind emerging trends to explore the “why” behind consumer decisions. This allows us to confidently identify the dishes, concepts, or ingredients that resonate with tomorrow's consumers.

Understanding this "why" empowers you to spot (and even create) the next "what" – a strategy that anchors the daily practices of our customers leveraging Tastewise SaaS solutions.

We track billions of consumption moments across home cooking, and foodservice to identify trends at the root. To do so, our criteria for trends are as follows.

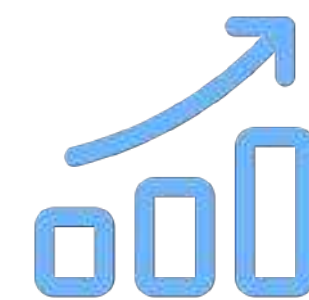
Trends must:

- Surpass a critical 'consumer interest' threshold; tiny trends with low engagement aren't highlighted.
- Have shown consistent growth in consumer interest over the past two years.
- Demonstrate growth and engagement across multiple data sources, including foodservice, home cooking, and beyond.

Powered by food-specific data, deep industry expertise, and cutting-edge GenAI, Tastewise AI leveraged datasets of 7.14M consumers, 45M social media posts, 6.3M recipes, and 168M dishes across 1.1M restaurants to inform the insights in this US-focused report.



Our suite of solutions includes:



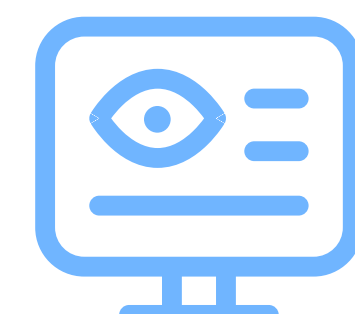
Real-time consumer insights and enhanced market presence



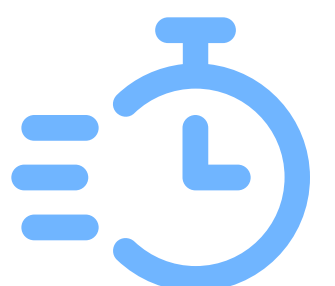
Rapidly-generated, personalized content for today's consumer



AI-powered insights on claims, trends, & consumers through self-serve Gen AI and AI surveys



Efficient collaboration and insights democratization



Streamlined workflows to save time and boost productivity

Questions? Reach out to info@tastewise.io

In review: Tastewise's 2024 trend predictions

For the past five years, our trend predictions have hit the mark. Let's review 2024's top trends, setting the stage for what's coming in 2025.

Trend 1:

AI dominates 2024's marketing scene

Trend 2:

Indulgent and affordable dishes, including offal, rise as consumers tire of limits

Trend 3:

Late night snacking gets a rebrand with cottage cheese

Trend 4:

Digital and pop culture redefine food communities

Trend 5:

Get ready for the 'guajillo' pepper craze

Trend 6:

Natural sugars and women's health

Trend 7:

South/East Asian flavors take center stage

Trend 8:

Ozempic and the shifting weight loss narrative

AI in F&B in 2024

74%

of marketers use at least one AI tool at work; OpenAI's paid business model hits 1M paid users¹

¹ - Source

Affordable indulgence

+78%

more restaurants serve offal than in 2023 as affordable indulgence meets foodservice cost cutting

Late night protein snacking

+46%

more occasions of late night snacking take place in consumer kitchens; cottage cheese grows 32.6% in consumer interest

Digital pop-culture

100

bottles of limited edition "Ketchup and Seemingly Ranch Sauce" produced by Kraft Heinz sold out almost immediately after a viral Taylor Swift moment, attracting huge social media attention

Global peppers

+8%

more menu mentions of guajillo peppers show up in restaurants in the last year

Natural sugar and women's health

+70%

more discussions of F&B for hormone balance happen on social media, plus 48% more discussions about role of sweeteners

South/east asian flavors

+10%

more mentions of Korean desserts show up on US menus this year

Ozempic shifts

+212%

more consumer conversations about weight loss drugs and food and beverage take place on social media

Our global customers trust Tastewise AI to make decisions and execute at unprecedented speed and scale

1 Trillion

Data Points

In-Home & eRetail

72B

Observed F&B moments

Social Media

4M+

locations and best-selling menu items

Restaurants & Food Delivery

Our customers:

Versatility unveiled

Meet 2025's must have spices: **Hawaij & Black Lime**

Consumer interest in authentic spices has grown by 26% in the last year, driven by a desire for unique, traditional, and creative flavors. Enter Hawaij and Black Lime—two Middle Eastern staples set to dominate American kitchens in 2025. These versatile ingredients pack both flavor and functional health benefits, making them must-haves for consumers looking to level up their palate.



Hawaij, a classic Yemeni spice blend with versions for coffee and soups, shines in sweet, savory, and beverage applications alike. Meanwhile, black lime offers a tangy, smoky twist, perfect for stews, marinades and beyond. Brands that introduce these spices in familiar formats—think hawaij lattes or black lime rubs—will lead the way in making global flavors more accessible.

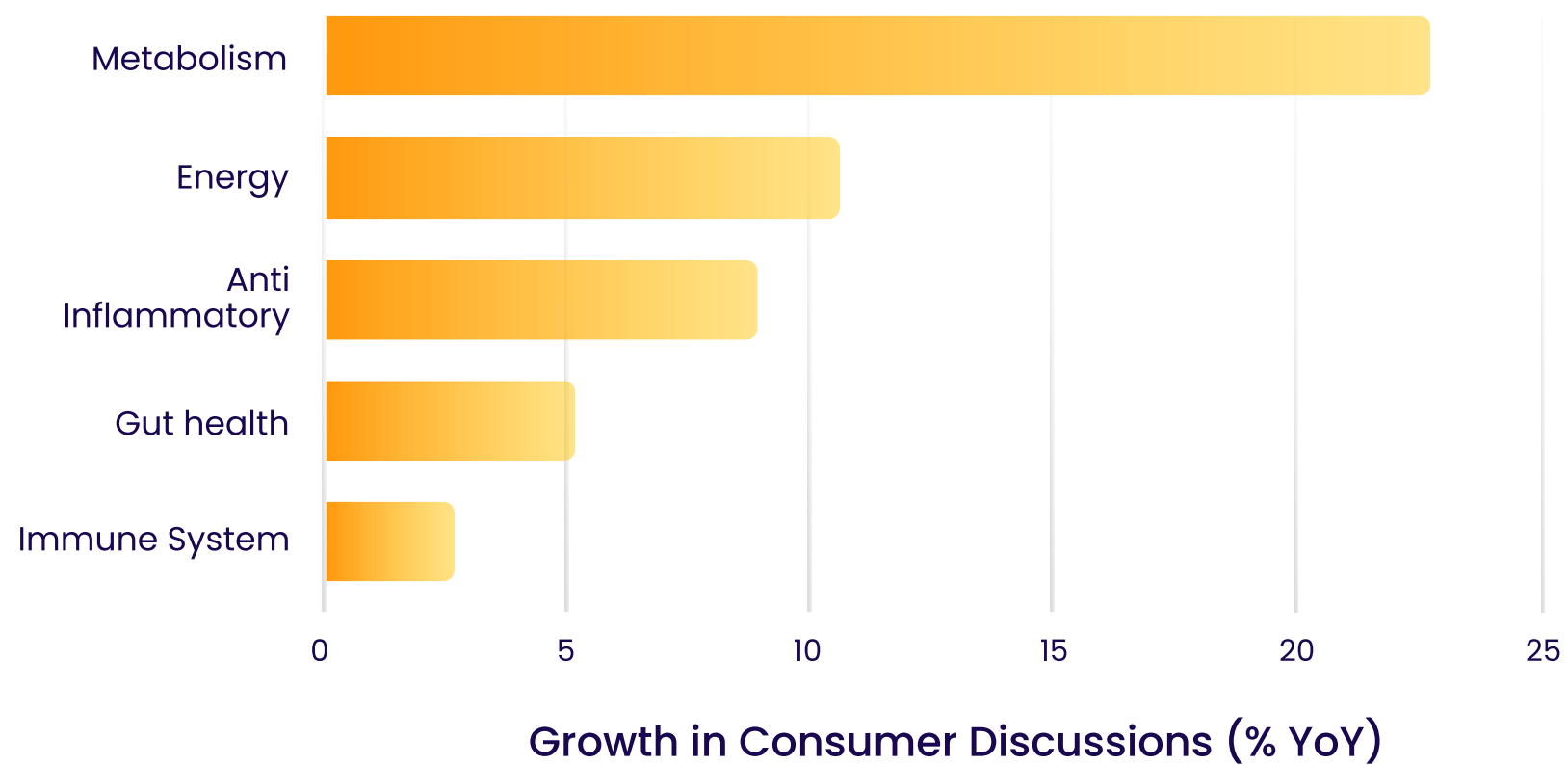
These ingredients can do a lot, so we're focusing our recommendations for you. Here, we'll be exploring why hawaij will drive the US's next coffee craze, and how black lime is set to spice up condiments. As consumers continue to explore culturally significant spices, expect hawaij and black lime to become pantry staples for home cooks in the year ahead.

Hawaij

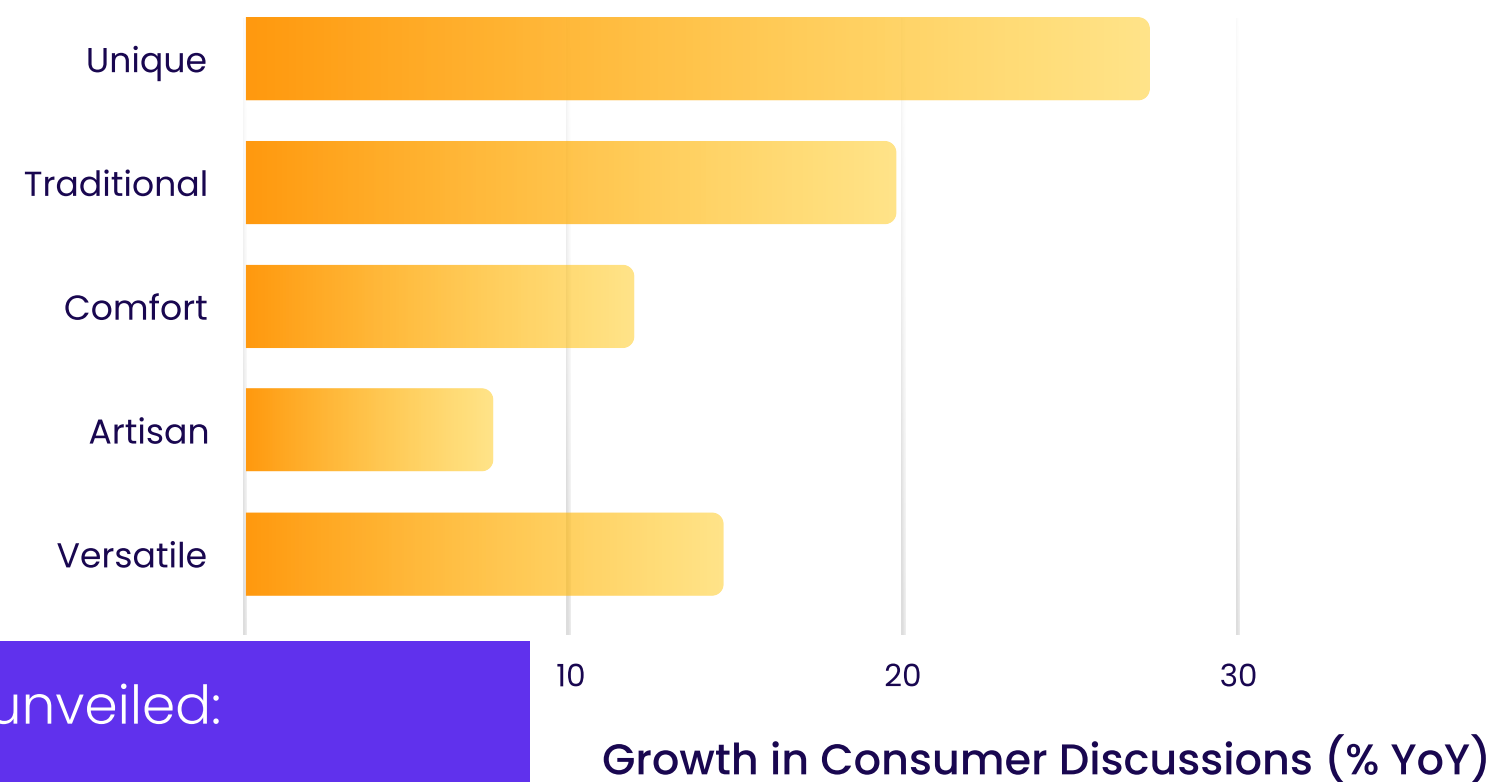
Versatility unveiled

Hawaij is the new pumpkin spice: The flavor trend taking over American palates

Interest in functional health claims for spices over time



Interest in experiential claims for spices over time



Versatility unveiled:
Hawaij



Traditional and comfort-driven spice experiences are seeing significant traction, signaling a balance between innovation and familiarity in spice choices. At the same time, consumers increasingly look to spices to stimulate the metabolic, energy, anti-inflammatory, gut health, and immunity benefits of what they eat and drink.

Enter: Yemeni spices, up

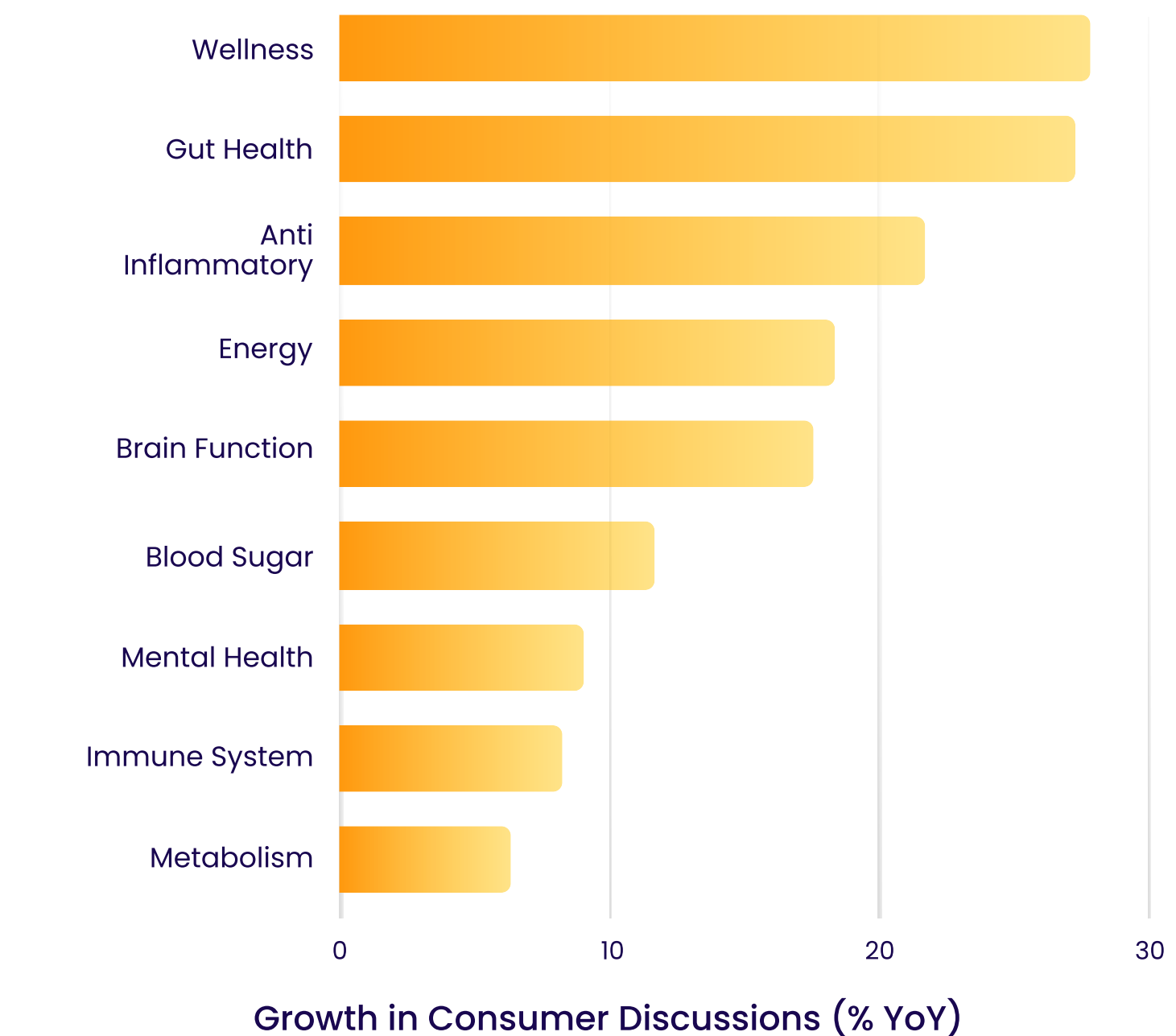
+39.7% YoY

in consumer interest.

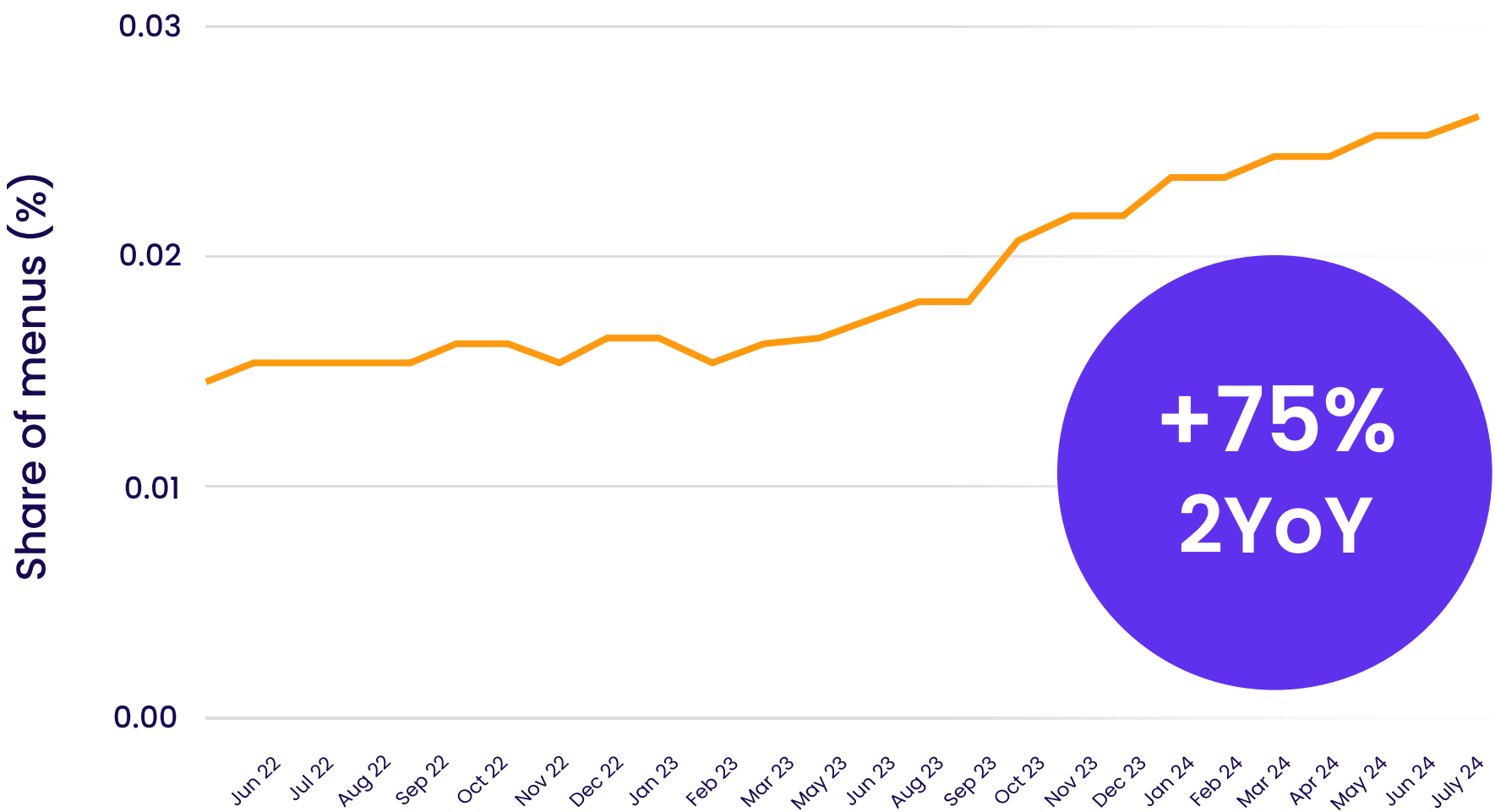
Hawaij, warm, healthy, comforting with traditional Yemeni roots and versatile variations for coffee and soup, will be 2025’s darling.

Spice meets wellness: Why hawaij is poised to transform coffee for U.S. consumers at home and away-from-home

Interest in established and trending functional health claims for coffee, over time



Menu mentions of Yemeni coffee



Best of both worlds: hawaij for coffee combines popular, comforting flavors in a unique way (cinnamon and ginger account for **6.7%** and **4.4%** of American spice consumption), and its functional health benefits – antioxidants, digestion, immunity, anti-inflammation and more – align with trending health demands in both spices *and* coffee. A win win.

Take advantage of versatile hawaij in foodservice *and* home cooking. Call out hawaij’s Yemeni roots, and offer it alongside traditional Yemeni coffee varieties to capture growing menu trends, where Yemeni coffee is on the rise

75% 2YoY

At home, enliven an oversaturated pumpkin spice recipe landscape (recipes for PSL dropped 8% in the last 2 years, indicating fatigue!) with creative recipes for hawaij lattes, hot chocolates, cocktails, granolas, and more. Spice it up!



Versatility unveiled:
Hawaij

Hawaij in the glass: Emerging mainstream applications

@sanajaverikadri



2,230

BTS of making a spice blend with my fam!! I think we can all agree that @nadir.nahdi is THE BEST food culture storyteller of our time. I feel so damn lucky that he put his whole heart and that wild creative genius brain into creating this DELICIOUS Hawaij Masala with us 🤗 ... When I started @diasporaco 7 years ago, I knew that we were investing in South Asia's BEST spice farmers, but we were also investing in telling stories of food, culture, migration and politics through each spice and its origins... we're telling the story of how spices and cuisine has travelled between Indonesia, South Asia and Yemen for thousands of years...

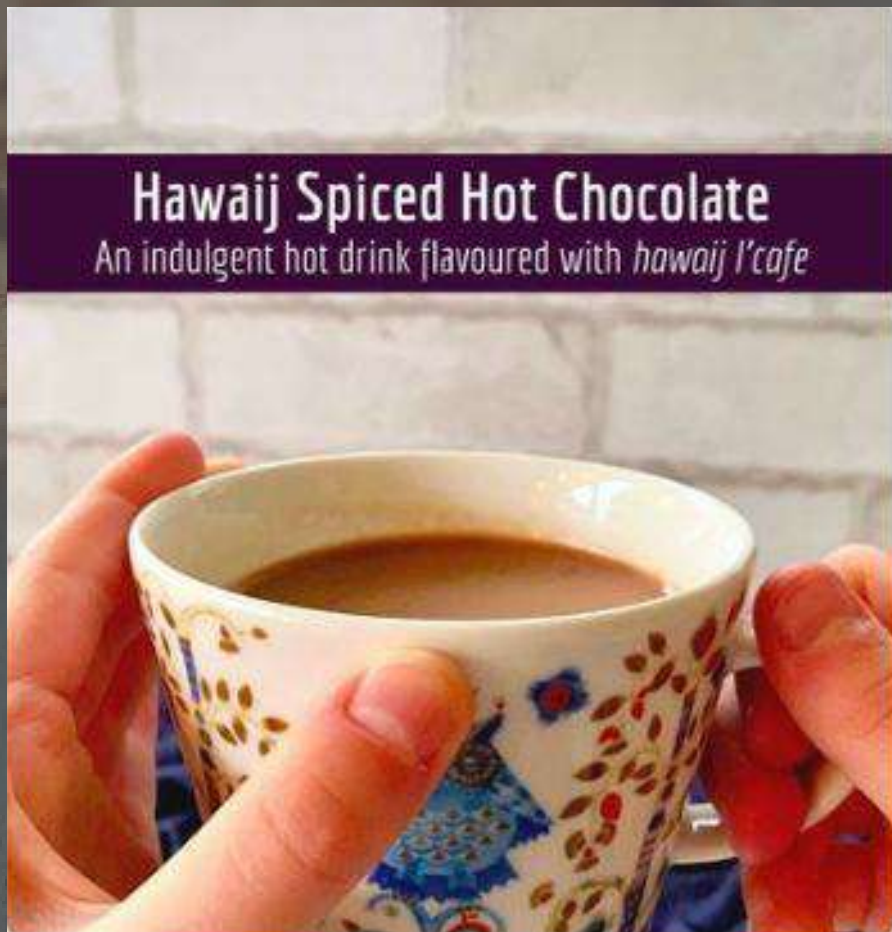
@busyinbrooklyn



302

I don't know what I'm loving more these days, my HAWAIJ GINGERBREAD ICED LATTE or the ice inside!! I'm legit obsessed with this GE nugget ice machine with a side tank that I got at @yudinsappliances! On sale now! Makes a great Chanukah gift! GINGERBREAD ICED LATTE 2 shots espresso 3/4 tsp TK Hawaij for coffee (link in profile) 1 tbsp silan (or to taste) 1 tbsp brown sugar Ice 1/2 cup milk of choice #partner #coffee #latte #icecoffee #icelatte #gingerbread

Family-Friends-Food



48

Easy spiced hot chocolate mix with hawaij for coffee spices - warming cloves, fragrant cardamon & lip-tingling ginger. Just add hot milk!

Jaime Geller



29

Homemade pumpkin chai hawaij latte: Skip the line at the local coffee shop and make your own pumpkin-chai latte with real pumpkin!

Capture the trend with ideas from Tastewise's AI-driven Content Agency:

Concept



Espresso martini with hawaii-infused vodka

Positioning

Hawaij Gourmet - The Foodie's Spice Blend



Foodies, gourmet

Foodies are always on the lookout for new and exciting flavors to incorporate into their dishes. The unique blend of spices in Hawaij would be a great addition to their culinary adventures. With a YoY growth of 19.68% and a relevance of 1.40X more than average, the claim 'gourmet' is a perfect fit for this audience. Hawaij can be marketed as a gourmet spice blend that can elevate any dish, appealing to the sophisticated palate of foodies. This spice blend can be used in a variety of dishes, offering a gourmet culinary experience that foodies would appreciate.

Recipe

AI Recipe
Hawaij Coffee Cake

This is a delightful coffee cake that incorporates the warm, aromatic flavors of Hawaij spice blend. The cake is moist and fluffy, with a rich coffee flavor that is perfectly complemented by the sweet and spicy notes of the Hawaij. It's a perfect treat for breakfast or dessert, and pairs wonderfully with a cup of coffee or tea.

Serving size
This recipe makes one 9-inch cake, which should serve 8-10 people.

Duration
The total cooking time is approximately 90 minutes, with 30 minutes of active cooking and 60 minutes of baking time.

Difficulty
medium

Potential Engagement
1480



Versatility unveiled:
Hawaij

Black lime

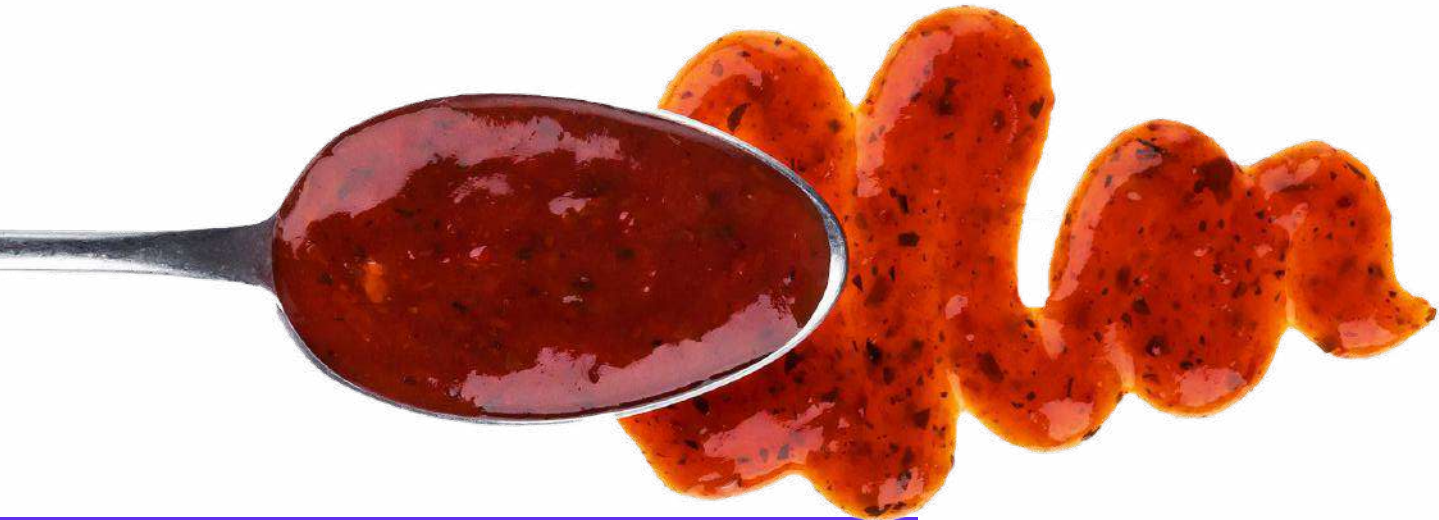
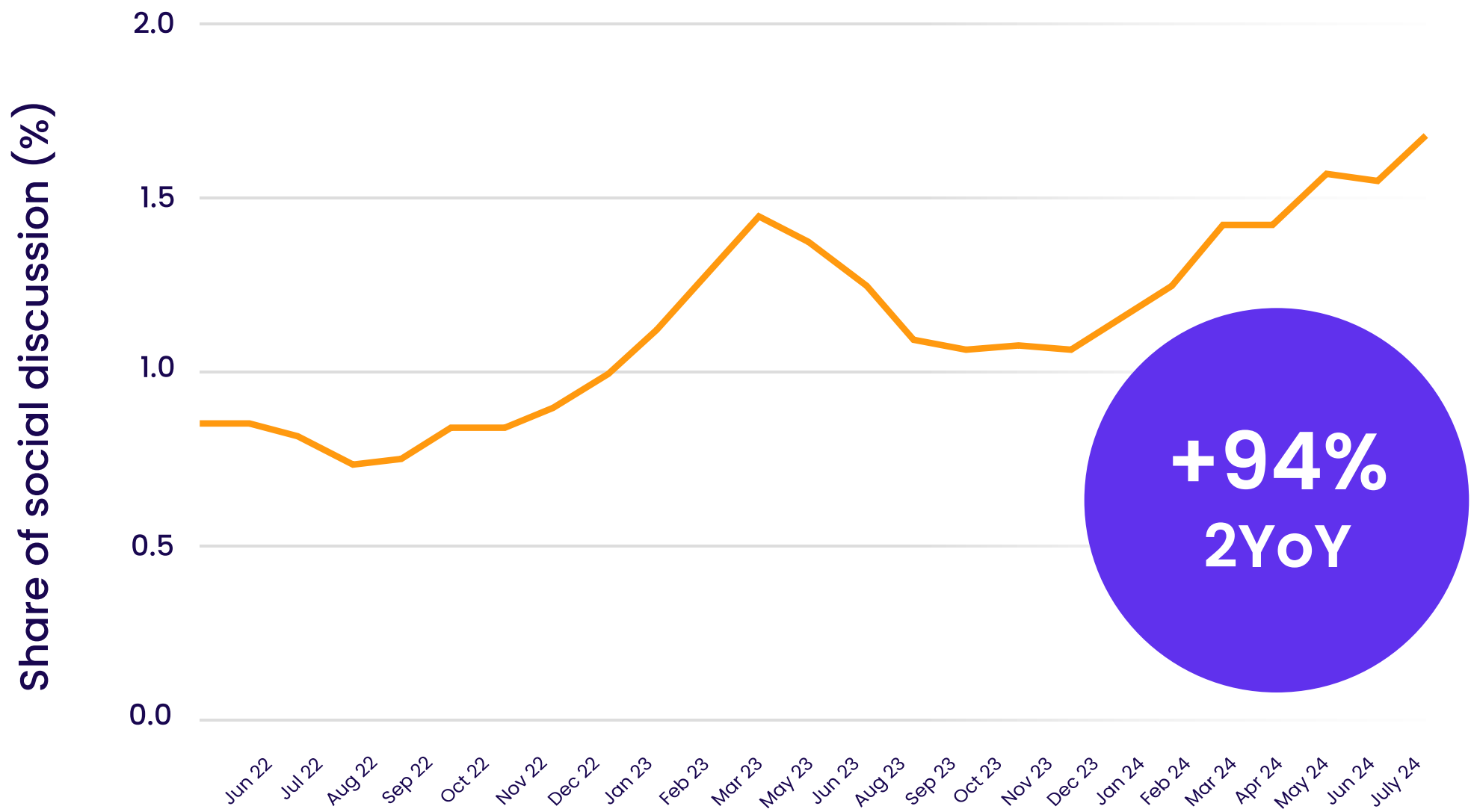
Versatility unveiled



Tangy black lime is the next hot honey

Bold sauce flavors are reshaping the way consumers experiment with flavor and health on the plate

Consumer interest in tangy sauces over time



Versatility unveiled:
Black lime

Popular examples of tangy condiments across home cooking, social media, and foodservice

Greek Marinated Chicken



1,424,423

A tangy lemon and garlic marinade makes this Greek Marinated Chicken super fast and flavorful. Cook it in the oven or on a grill. Step by step photos.

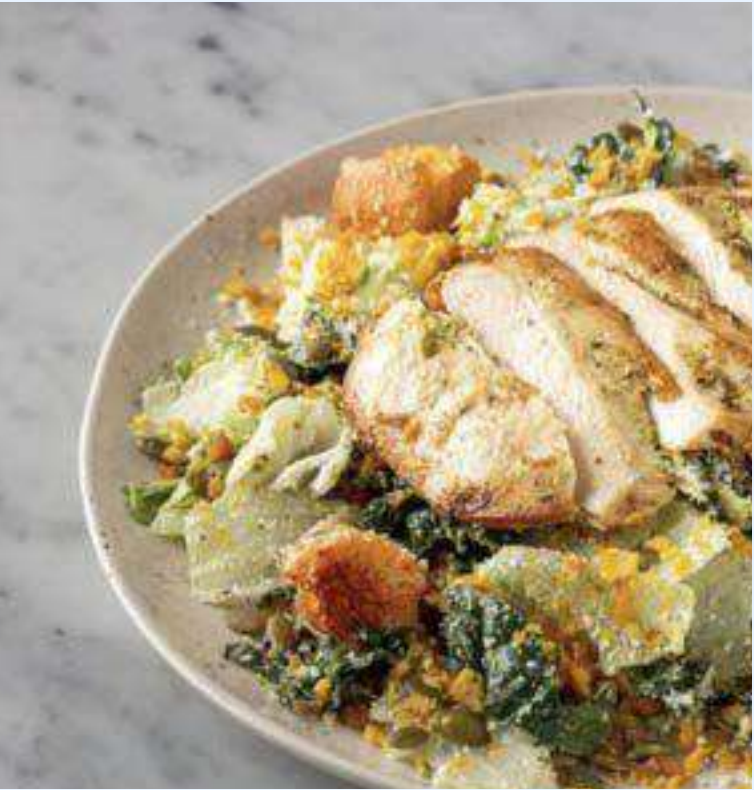
@giallolovesitaly



270,577

Get ready to spice up your burger night! 🍔🔥 These homemade Chicken Burgers with a tangy kick of Spicy Sweet Sauce are the ultimate flavor explosion! Who's hungry? 🍴🌶️ Ingredients: 400g ...

Grilled chicken cilantro caesar salad



\$13.19

Iceberg lettuce, Tuscan kale, grilled and marinated, chicken breast, from multigenerational family farms, with cotija cheese, roasted pepitas, crushed Mariquitas, and tangy, cilantro Caesar dressing

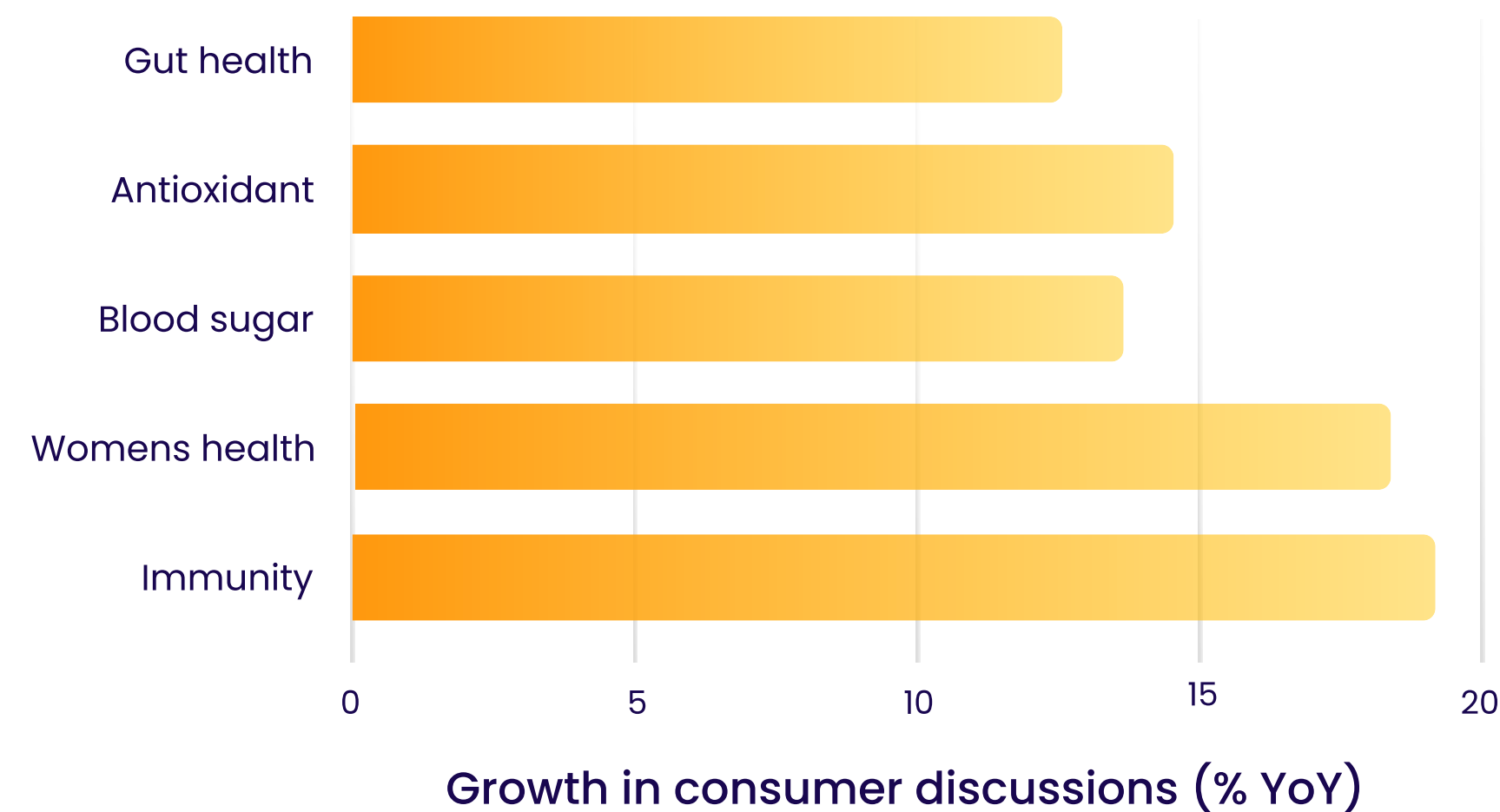
Tangy condiments are having a moment, with consumer interest skyrocketing **+94%** over the last two years. Once tied to summer dishes as tangy barbecue sauces, tangy condiments are now breaking seasonality boundaries with increased consumer interest. As the final touch on the plate, condiments are the go-to for consumers looking to experiment with bold, unexpected flavor pairings, reflecting a shift toward playful, adventurous eating with minimal risk.

Black lime packs flavor and functional punches, capturing 42% more use for health needs over the last year

+15.4%

Growth in consumer interest in black lime over the last two years

Consumer interest in functional health claims within condiments



Versatility unveiled:
Black lime



Black lime, a dried citrus with a tangy, sweet, and smoky profile, is emerging as a key ingredient in condiments. Traditionally used in Middle Eastern and Gulf cuisines (it's also called Persian lime) in stews and teas, it's now driving American consumer interest in bold, tangy flavors. Black lime-based condiments are called out for tanginess

2.5x

more often than average

making it a powerful tool for brands looking to meet today's flavor demands.

Beyond its flavor, black lime offers trending functional health benefits; rich in vitamin C and antioxidants, it aligns with the growing consumer focus on wellness. Health claims like immunity, gut health, and blood sugar management have seen significant year-over-year growth in interest in the condiment category, with

immunity up nearly
18% YoY

Food and beverage brands can leverage black lime to not only satisfy flavor expectations, but to meet rising demands for functional, health-forward condiments.

Black lime adds a tangy, functional last touch to savory dishes

@libraebakery



2,504

Sandwich Alert Sandwiches are now available daily! Menu below: 🥑 Librae Caprese with fresh mozzarella, tomato ginger chutney, preserved lemon, and basil on a demi baguette 🐟 Smoked Salmon Sandwich with labneh, cucumbers, pickled onions, cucumbers, dill, and **black lime** on an everything pretzel roll 🥞 Croissant Sandwich with soft boiled eggs, Red Hawk washed rind cheese, dressed greens on a butter croissant 🐟 Tuna Sandwich with olive oil herb tuna, sumac onions, dressed kale, and mayo-mustard on house sourdough *Please note egg sandwiches are available Friday-Sunday only.

@christopherastrm



2,083

Blackened Flap Steak with Tomatoes and **Black Lime** and Maple Butter Serves 4 Steak: 500g flap steak, portioned into 3 3 tbsp olive oil 2 tsp ground black lime 1 Urfa Chile flakes 50 twists of ground black pepper 1 tsp sea salt Sauce: 50g butter, browned 1 tbsp soy sauce 2 tsp maple syrup 1 tsp ground black lime 1 tsp Urfa Chile flakes 1/2 garlic clove, grated To serve: 300g of a variety of ripe tomatoes, sliced 1 red onion, thinly sliced Sea salt Lemon wedges Good breadd. Inspired by: Ixta Belfrage

@flamingo_estate



583

We still have a few vegetable boxes, mushroom boxes and avocado boxes available for delivery this Friday (anywhere in LA). This week we're including some Spicy Citrus Seasoning as a gift. Originally we set out to make a simple guacamole seasoning to go with our weekly avocado box...It's great on veggies, fish, popcorn, salad, the options are endless. The final recipe is an incredibly aromatic blend of Lemon Zest, **Black Lime**, Cilantro, Jalapeno, Caramelized Onions, Garlic, Black Pepper and Sea Salt. I hope you all love it as much as we do x Richard

Noor's black tofu, Ottolenghi



102

This dish is an Ottolenghi favourite and best served with steamed rice or flatbread, the **black lime** brings out a fresh, sharp flavour to the dish.

Capture the trend with ideas from Tastewise’s AI-driven Content Agency:

Concept

Tangy Persian Lime Sauce with Blood Orange

This Persian Lime Sauce is innovated with the addition of blood orange from our data, which has a 16.8% YoY social change. The 'tangy' claim, with a YoY growth of 38.64%, is also incorporated into this sauce. The tangy flavor of blood orange enhances the lime, creating a sauce with a vibrant citrus punch.



Black Lime Rub - The Foodie's New Favorite



Foodies, refreshing

Foodies are always on the lookout for new and unique flavors to try. The black lime rub, with its unique taste, would be an exciting addition to their culinary adventures. The refreshing flavor of our black lime rub will be a delightful surprise for foodies. Its unique blend of flavors will provide a refreshing twist to their usual meals, making it a must-try for those who are always on the lookout for new and exciting flavors to try.

Concept

Persian Lime Honey Lemon Twist

This innovative condiment combines the tangy freshness of lemon, which has seen a 52.4% YoY social change, with the sweetness of honey and the unique flavor of Persian lime. The condiment is perfect for those who love sweet flavors, a claim that has seen a 14.29 YoY growth. This condiment can be used in a variety of dishes, adding a sweet and tangy twist.



Concept

Versatility unveiled:
Black lime

Ethical provenance

Sustainability gets specific: **Carbon labelling & soil health**

Consumer demand for sustainability in food and beverage has grown significantly since 2019, with a sharp focus on aligning planetary health with personal well-being. As consumers increasingly view these two priorities as interconnected, the desire for *specific* health benefits in products is now echoed by interest in targeted sustainability claims.



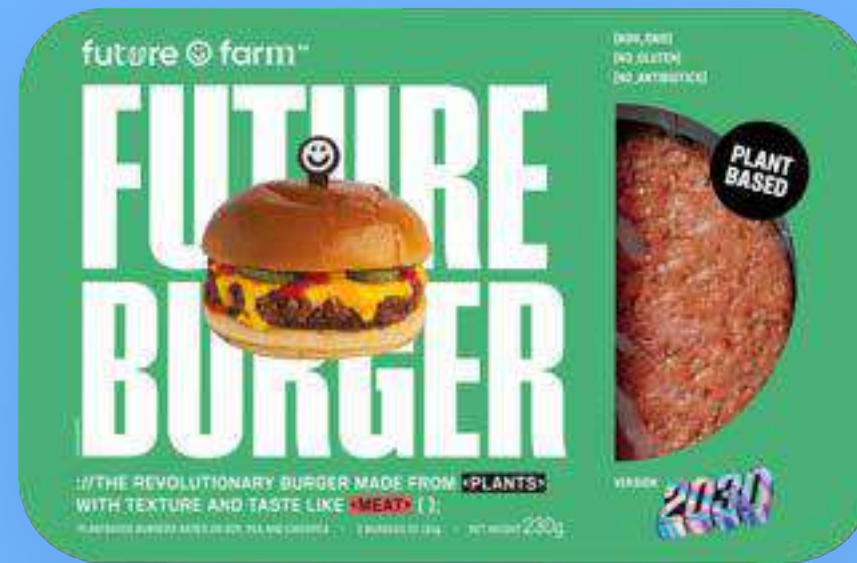
Today, consumers expect brands to address sustainability through reduced carbon emissions, improved ethical practices, and regenerative agriculture.

In this section, we explore carbon labeling as a natural consequence of this shift towards specificity, and how sustainability can enhance the experiential aspects of food – like the gourmet appeal of wine. From brands with the capacity to redesign production systems to those looking to tap into sustainability without a major overhaul yet, there's a role for all in improving planetary health.

Transparency, traceability, and carbon neutrality are key drivers for 2025, with implications for marketing, business strategy, product development, and supply chains.

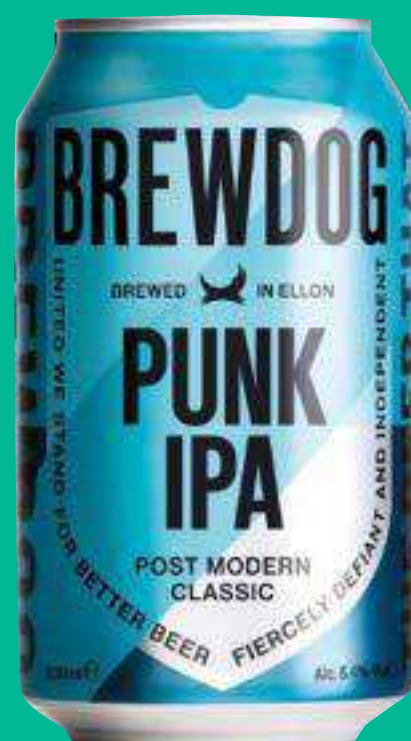
With an **18.4% growth in consumer interest in sustainable food & beverage** over the last 2 years, companies must meet these evolving expectations, aligning health, experience, and sustainability in their offerings.





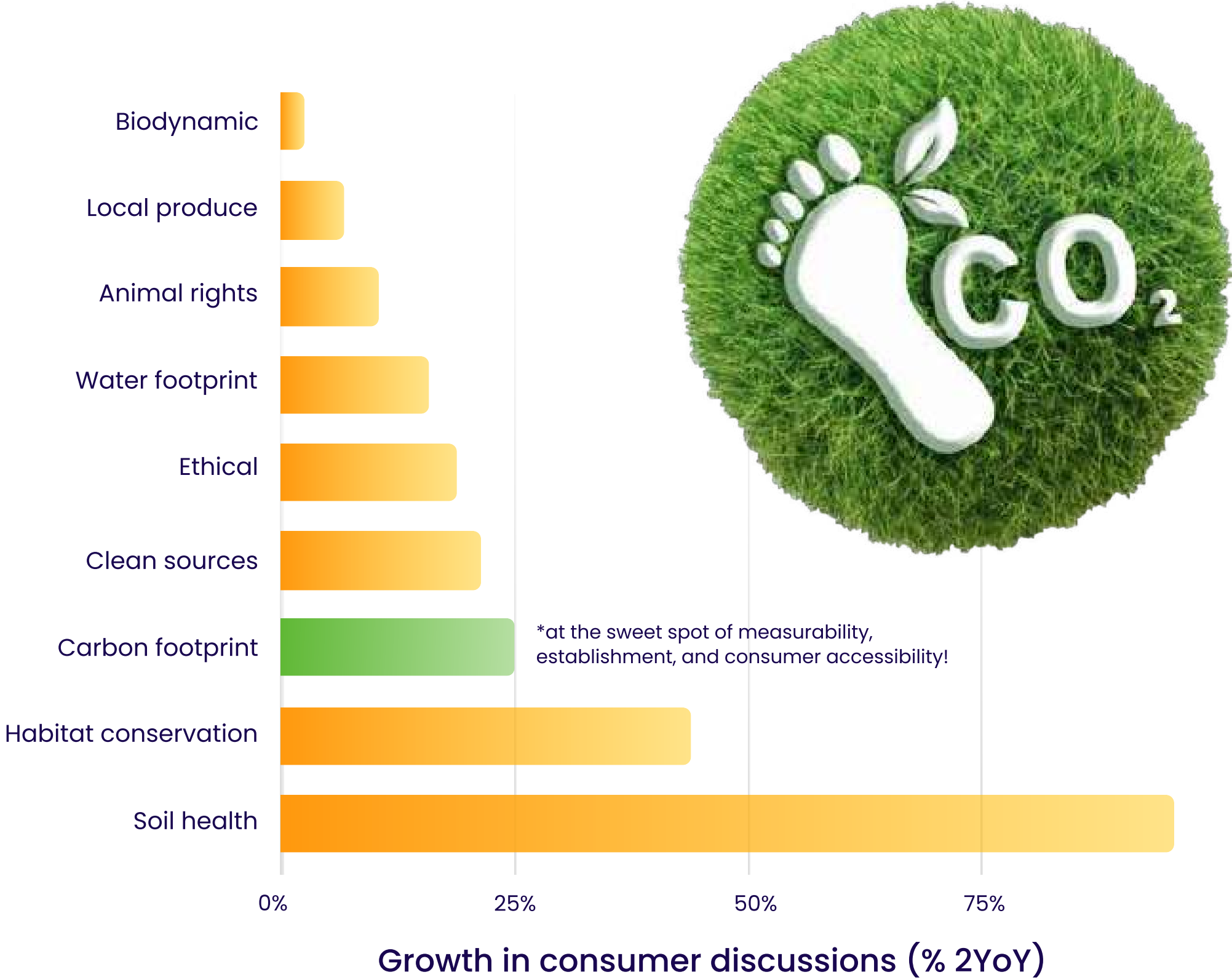
Carbon labelling

Ethical provenance



Carbon labelling: Meeting consumer demand for instant transparency and climate accountability

Trending ethical claims within sustainability discussions



Discussions of carbon footprint are up

+25%
2YoY

Clear labelling empowers climate-focused buying decisions in real time.

For brands, carbon labelling is an immediate opportunity to build trust and deliver on the climate accountability consumers now expect.

Consumer demand for transparency around food’s environmental impact is rising, with discussions of carbon footprint **up 25%** in the last two years. Consumers globally want real climate accountability, not greenwashing, and the industry is responding: European legislation set for 2026 will ban brands from claiming carbon neutrality through offsets alone, underscoring the need for genuine systemic change.

Despite concerns, **55%** of consumers are willing to pay a premium for truly eco-friendly brands; a recent study by PwC found that many consumers are willing to pay nearly **10% more** for products with clear sustainability impacts. The industry may struggle to meet demand, however; most sectors, including consumer goods, are off track to meet decarbonization goals. Companies like Upfield, aiming to label 500 million product packs by 2025 with clearly communicated action plans, are setting an example of how to do it right.



Ethical provenance:
Carbon labelling

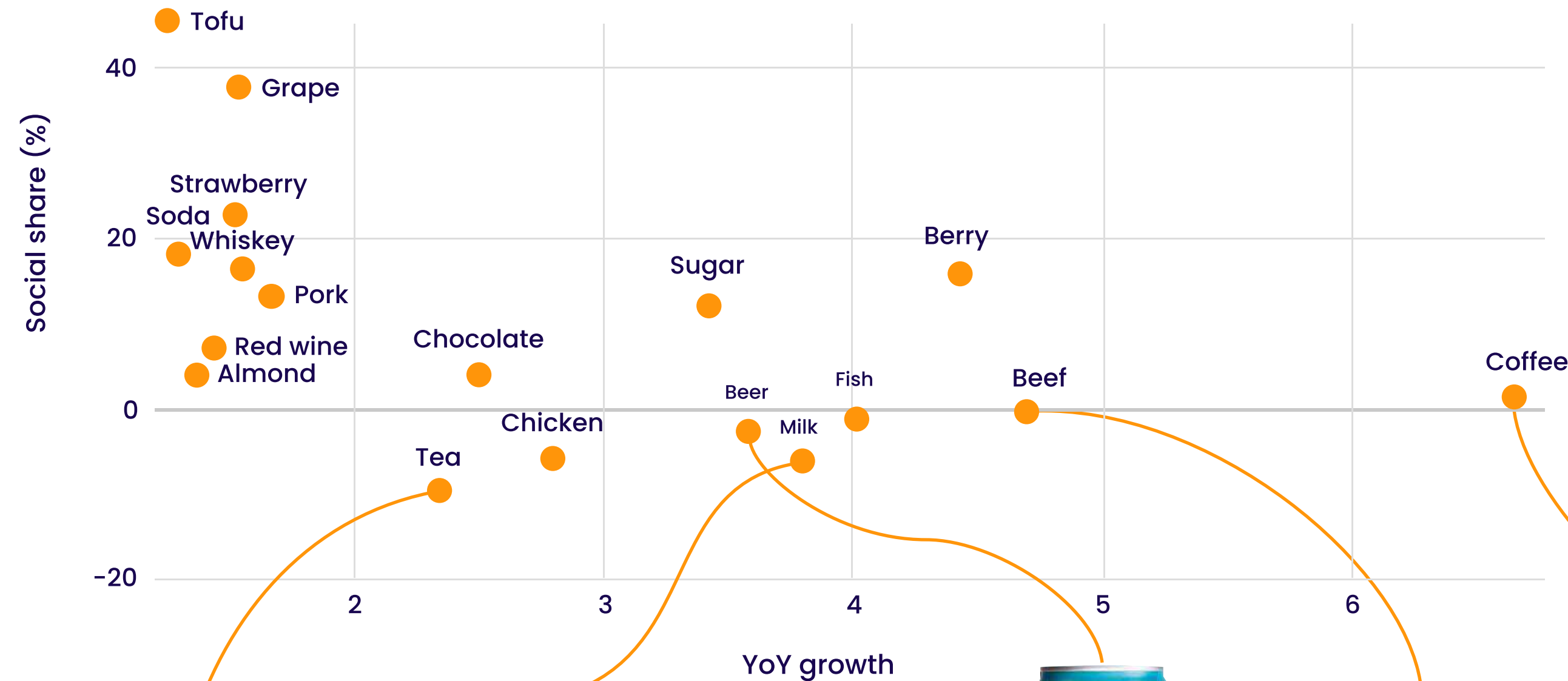
Consumer-driven carbon labels: Aligning transparency with ingredient impact

A variety of options exist for carbon transparency, from offsets (a temporary step) to the more ambitious goal of system redesign across supply chains: costly, time-consuming, but crucial for long-term impact.

Companies like [Carbon Trust](#) and [Carbon Neutral](#) offer certifications, while some brands choose to label independently. No matter the pathway, carbon labelling requires time and investment. Currently, there's no federally-mandated regulation in the U.S. for carbon labelling.

Note: several of these brands currently only exist in European markets"

Top ingredients in consumer discussions of carbon footprint



However, consumers increasingly want this back-end work clearly displayed on packaging—much like calorie counts—so they can make quick, informed decisions in the grocery aisle without second-guessing.

2025 will see more commitments (and restructured existing commitments) from more brands than ever as consumer attention heightens.



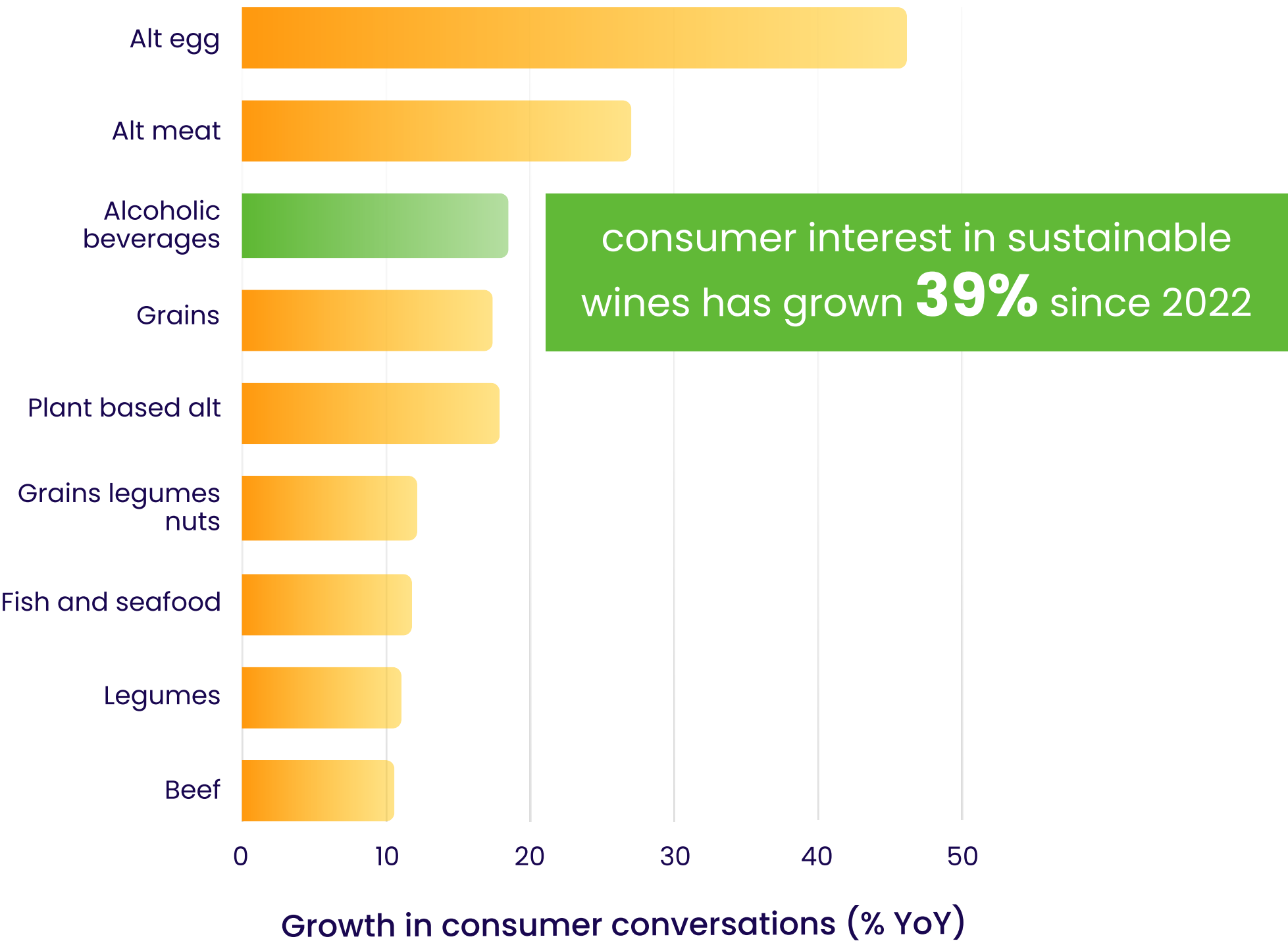
Ethical provenance:
Carbon labelling

Sustainable wine

Ethical provenance

Sustainable wines grow +39% in consumer interest, redefining gourmet experience

Top categories for trending interest in sustainability



Ethical provenance:
Sustainable wine



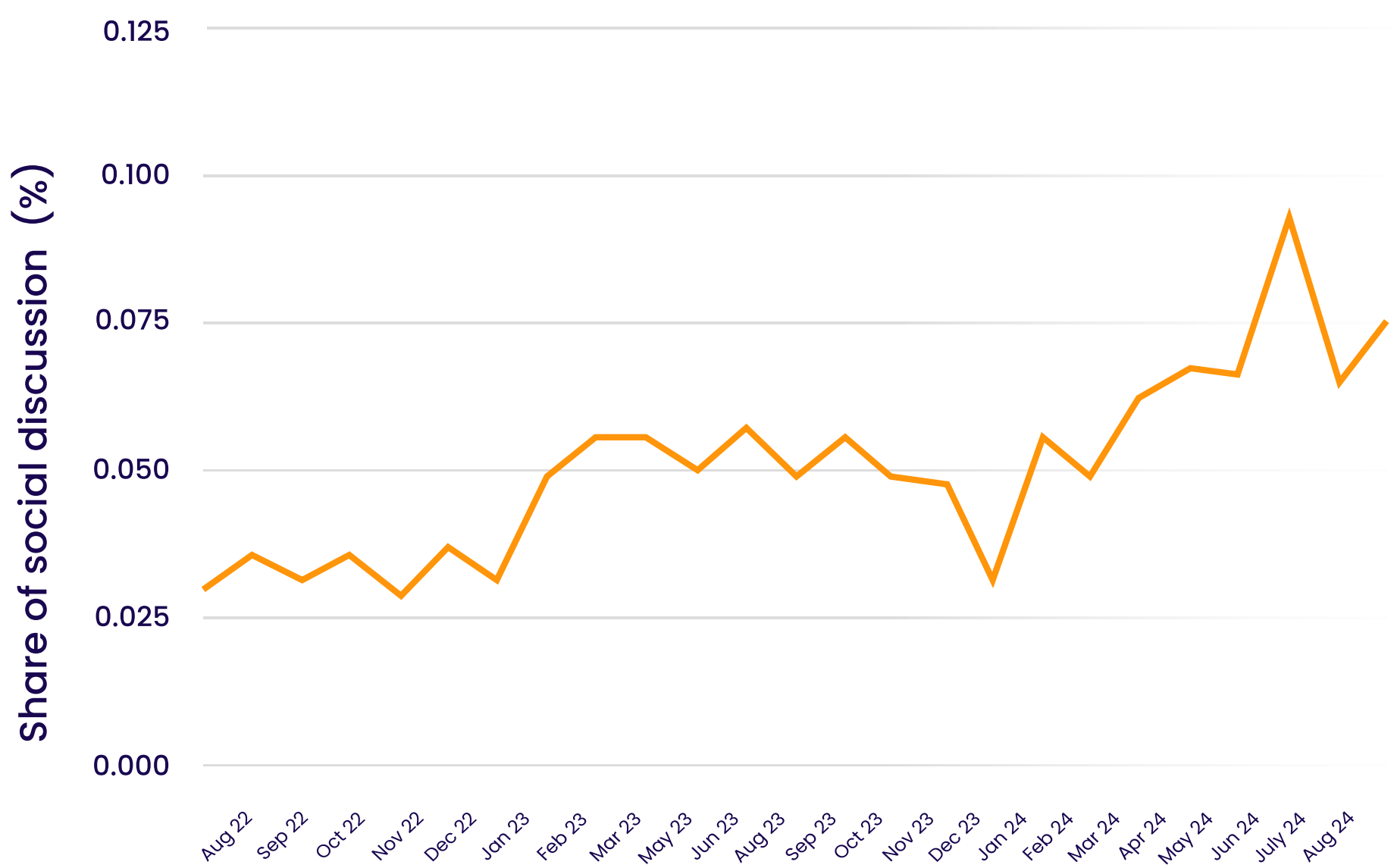
The alcoholic beverage category is undergoing a major shift toward sustainability; it’s now the third fastest-growing sector in consumer interest in sustainability, after alt-eggs and alt-meat. Leading brands are making significant strides: Diageo is targeting net-zero emissions by 2030, AB InBev is pushing for 100% renewable electricity by 2025, and Bacardi is working to eliminate single-use plastics.

While these commitments can transform the entire industry, it’s in the wine space that sustainability is getting a luxurious new image. The concept of *terroir*—traditionally defined by the unique climate, soil, and topography that influence a wine’s character—finds mainstream alignment with soil health and modern sustainability practices.

Sustainable wines are becoming a symbol of how sustainability can impact not only the environment but the experience of drinking.

Rooted and resilient: Soil health fuses traditional *terroir* with the urgency of sustainability in the mainstream

Consumer interest in terroir + sustainability within wine over time



Wine drinkers are increasingly linking quality, terroir, and eco-friendly practices

+39.6% YoY

Consumer interest in soil health within beverage production has grown by **80%** over the past two years. This trend is particularly pronounced in the wine industry, where soil quality has always been integral to *terroir*. Now, modern sustainability is entering the conversation.

Soil health is no longer just for sommeliers – it’s becoming a choice factor for consumers who crave not just **tradition** (+37% YoY in discussions of wine) and **gourmet indulgence** (+25% YoY) but eco-consciousness in their wine choices. **Sustainability** already appears in 5% of *terroir*-related discussions, and those conversations are growing +39.6% YoY.

The bottom line? Highlighting the role of soil health specifically within *terroir* and sustainability can capture an audience segment that may have been overlooked by the funkiness of natural wines – traditional, gourmet indulgence tells a different story. Brands and restaurants should incorporate soil health into their marketing, labeling, and experiential storytelling to capture this rising interest, making sustainability a core part of the wine experience.



Ethical provenance:
Sustainable wine

Hyper-personalized nutrition

Hormone balancing and the post-GLP-1 era

In 2024, hormones and menopause took center stage, sparking important conversations about previously overlooked audience segments with urgent functional health needs. As we move into 2025, the conversation continues, with a new focus on the fact that hormones affect **everyone**—not “just” women. Personalized nutrition is proving to be a powerful tool for consumers to meet their lifestyle and fitness goals, from managing hormone regulation to optimizing overall well-being.



At the same time, the rise of GLP-1 drugs like Ozempic in 2024 introduced a complex conversation around wellness, diet culture, and the role of celebrity influence on body image. While GLP-1 drugs offer big benefits, they also raise questions about long-term solutions and the high costs associated with them. As consumers look ahead to life post-GLP-1 drugs, brands have an opportunity to step in and provide hyper-personalized nutritional support that fills the gap, ensuring long-term health and wellness solutions.

In 2025, the opportunity lies in aligning personalized nutrition with real consumer goals, addressing both hormonal health and the next phase of the GLP-1 conversation. This trend offers implications for product innovation, marketing, and creating personalized pathways to support a wide range of consumers in their wellness journeys.



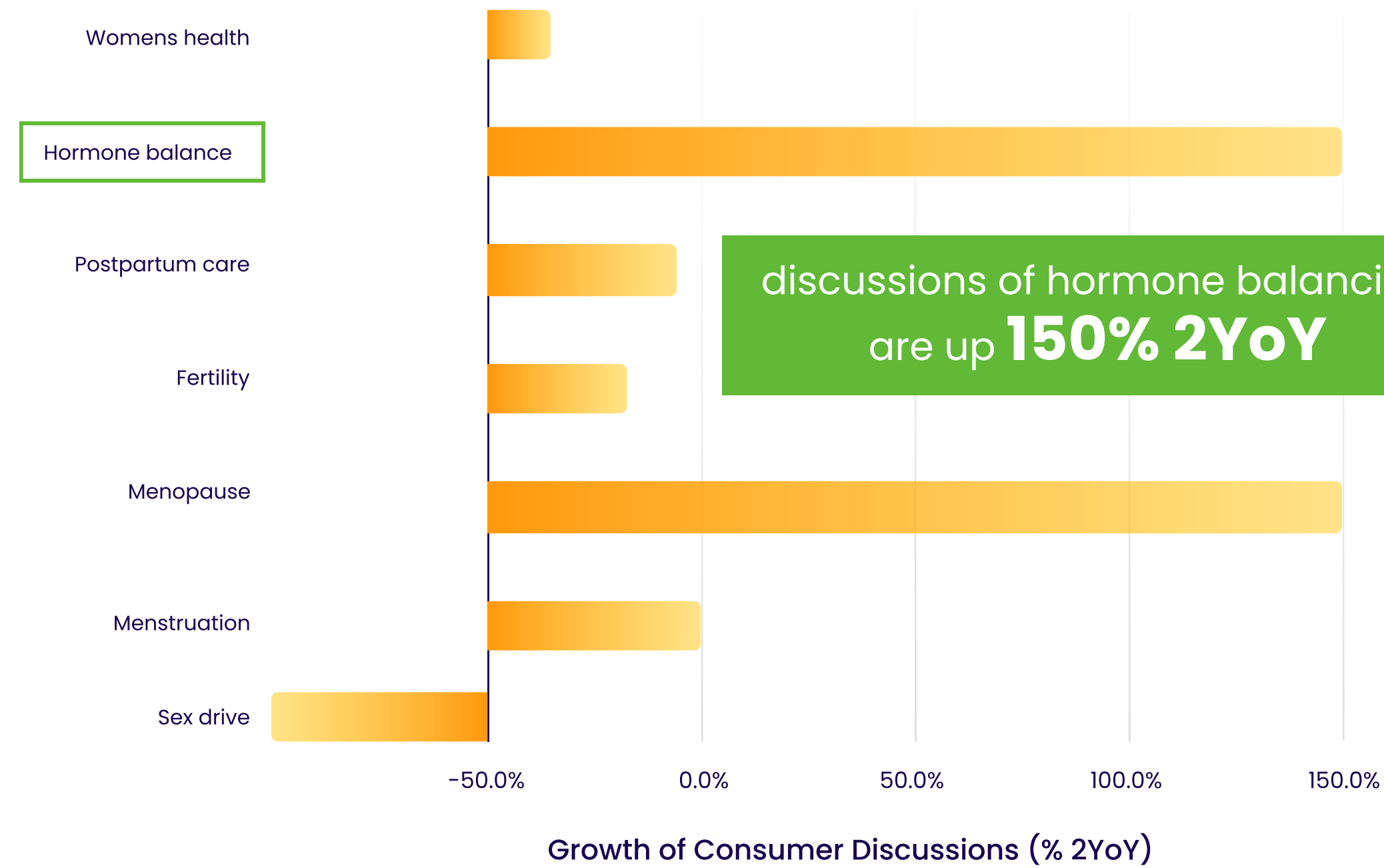
Hormone regulation

Hyper-personalized nutrition



Fit for your hormones: How hyper-personal nutrition plans are the new Peloton

Consumer Discussions of Select Functional Health Claims



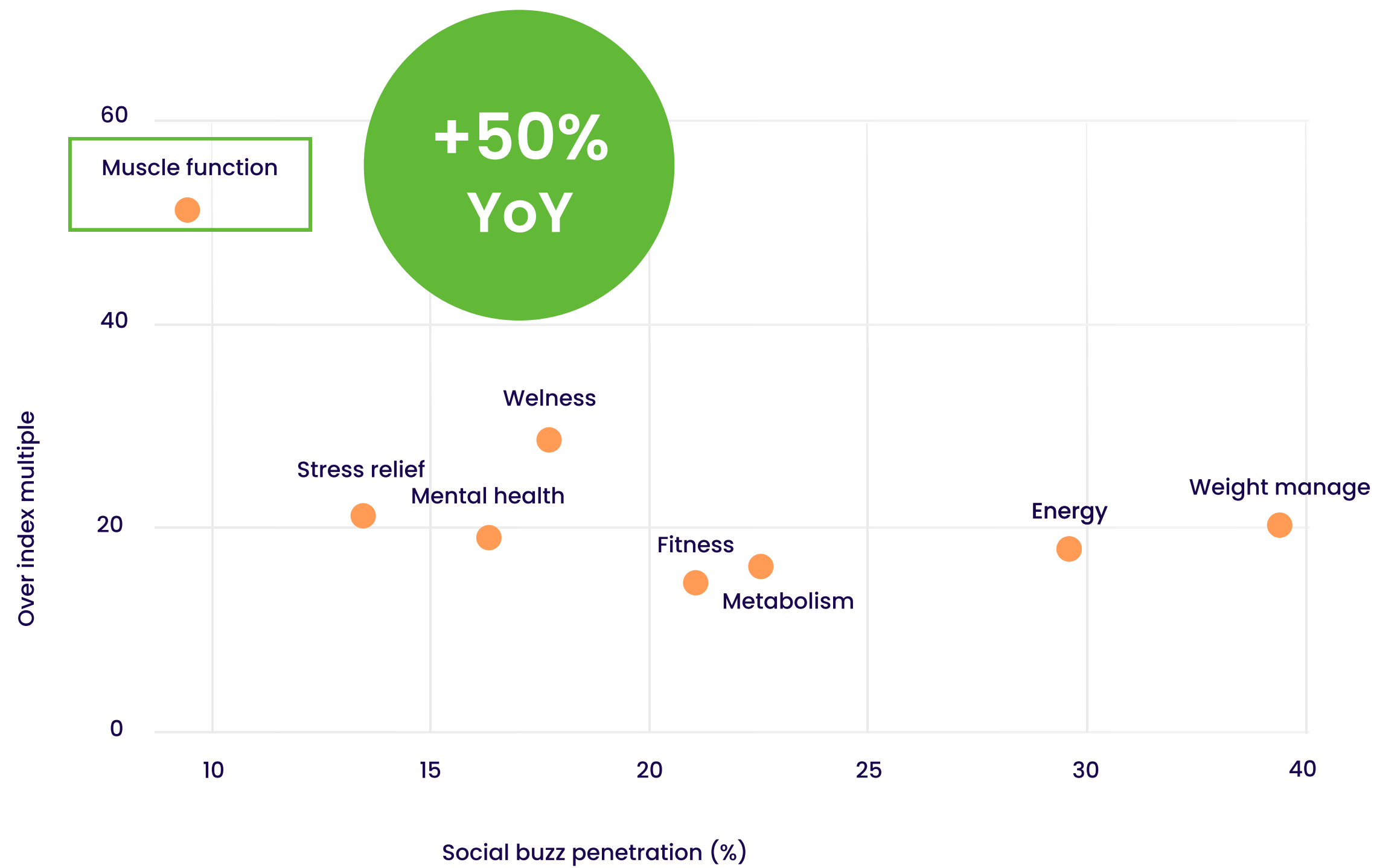
Consumer interest in hormone balancing has surged by **150%** since 2022; people are increasingly aware of the significant impact hormones have on whole-body wellness. Much like how gut health has become linked to crucial areas like sleep, mood, depression, focus, and libido, hormones are now being recognized as key drivers of overall well-being.

Following 2024’s rise in conversations around menopause and its influence on food and beverage choices, hormone balancing is taking on a new dimension—fitness. In 2025, we’ll see hyper-personalized recommendations in the gym, on social media, and in the grocery aisle for hormone-guided fitness journeys.

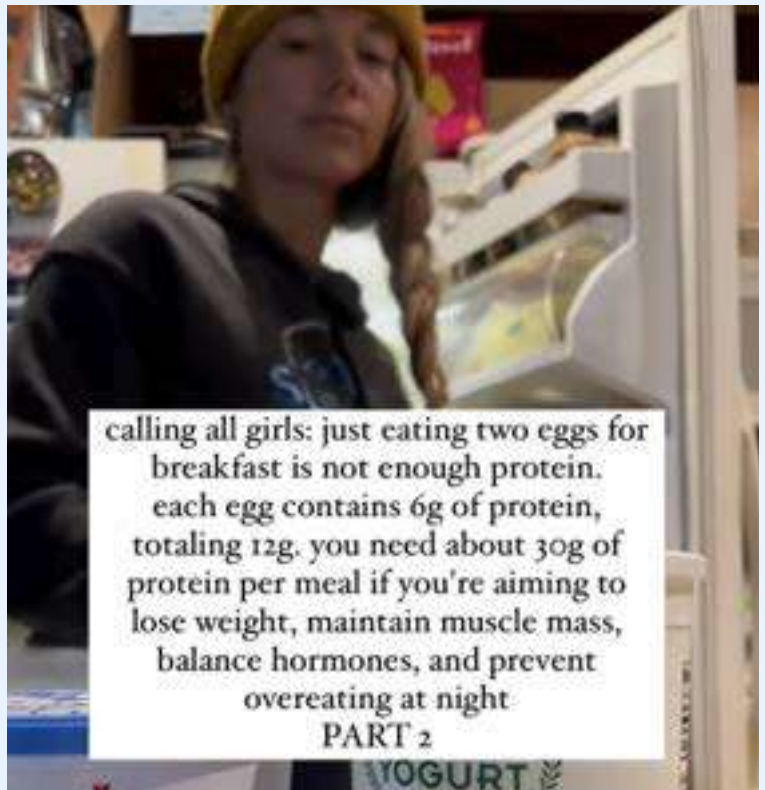
Personalized nutrition:
Hormone regulation

Cortisol, insulin, testosterone, GH, estrogen: Consumers take a closer look at hormones and muscle recovery

Trending functional health claims for hormone balancing



@lookbeneath_thesurface



270,577

The National Academy of Sports Medicine (NASM) and various peer-reviewed studies typically advocate for increased protein intake during weight loss to help maintain muscle mass. This approach is based on the understanding that protein has a high thermic effect, can increase satiety, and is essential for muscle repair and growth. Don't worry, I'll share some egg and dairy-free options in my upcoming posts. What's your go-to breakfast with 30 G protein? 1. Greek Yogurt and Nutty Berry Mix - ...#hormonehealth #weightlosstips #inflammationrelief #highproteinmeals #proteinpacked

Muscle function is an emerging trend for hormone balancing food and beverage. Call out ingredients that are high in protein with positive hormone impact to capture emerging interest in 2025.

Personalized nutrition:
Hormone regulation

The post GLP-1 era

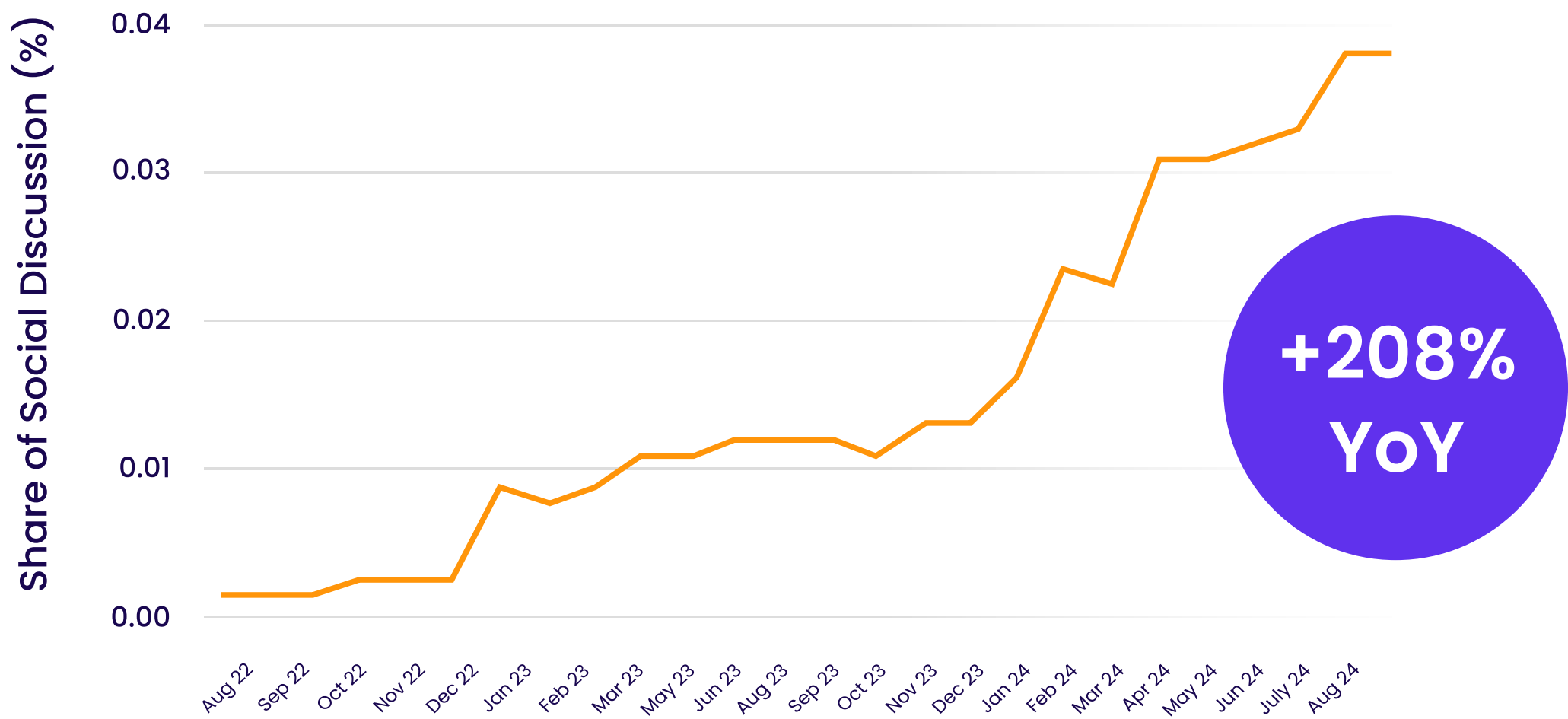
Hyper-personalized nutrition



Beyond GLP1: Why personalized nutrition will be the next health revolution

The future of health is customized, from diet to DNA, as discussions of weight loss drugs and F&B grow **+208% YoY**

Interest in F&B and weight loss drugs



24 million Americans may be on GLP-1 drugs by 2035¹



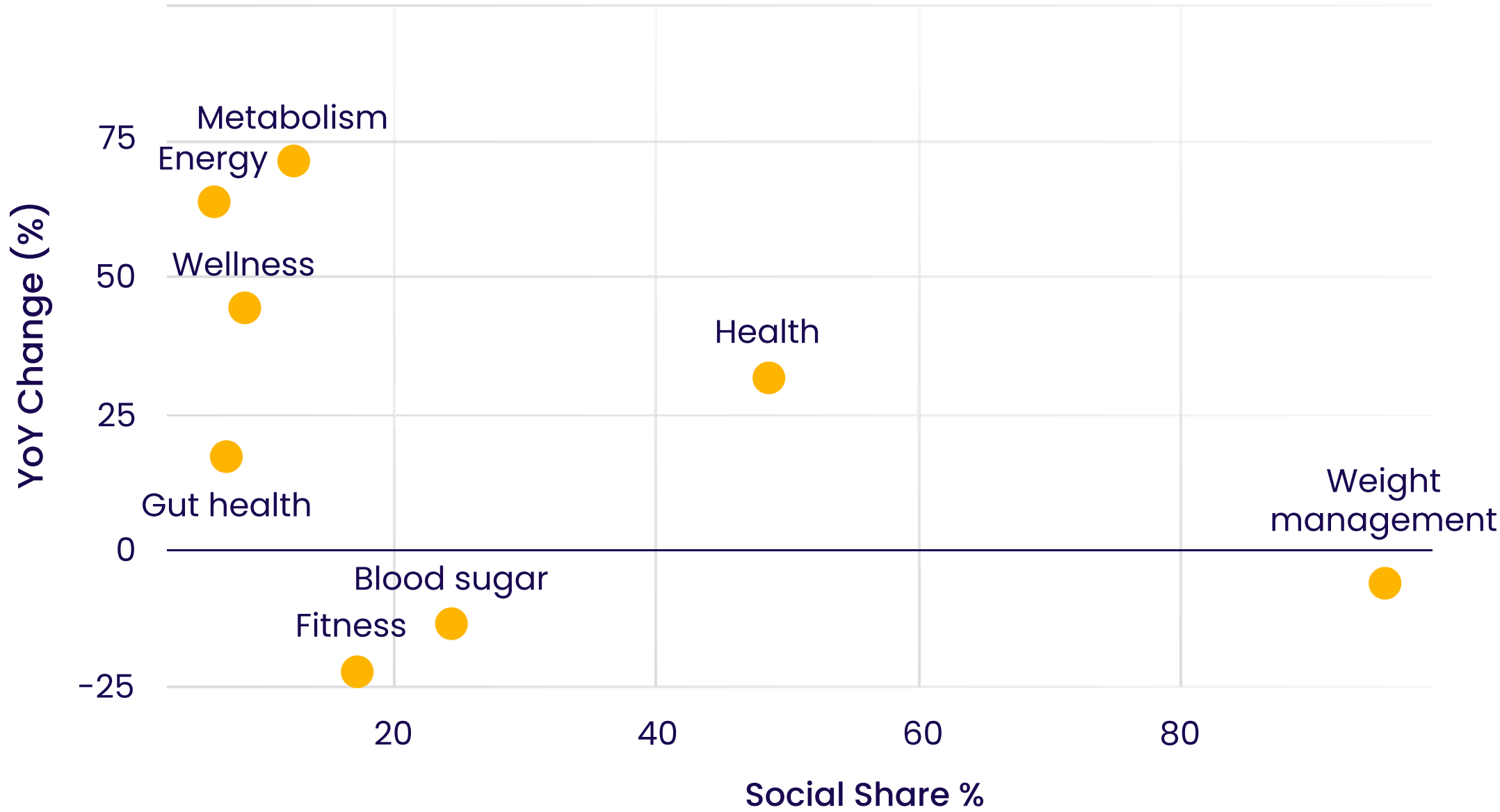
In our 2024 trend report, we explored the rise of GLP-1 drugs like Ozempic and their impact on consumption behavior, challenging brands to capture a smaller piece of the “pie.” Key opportunities still exist for brands to hyper-target the functional health and dietary goals of their consumers. Creating and marketing GLP1-specific product lines with clear labeling that addresses the functional health impacts of their ingredients will be critical for brands to stay relevant and cater to the evolving needs of this audience.

In 2025, new questions emerge as discussions around weight loss drugs in the food and beverage space have surged by **208%** year-over-year. While GLP-1 drugs show promise beyond diabetes and weight loss—addressing memory loss, and heart health—their high cost and potential side effects pose challenges. Many users struggle with adherence, and weight often returns once the medication is stopped; some medical experts claim that only <10% of former users will be able to keep off the weight lost. In personal post-GLP1 eras, brands can step in to support consumers with nutrition plans that help maintain results and fill the gaps left by the medications, ultimately capturing market share.

Hyper-personalized nutrition:
The post GLP-1 era

From weight loss to whole health: Evolving consumer demands around GLP-1 drugs

Top functional health demands in conversation about weight loss drugs



*Note: none of the insights in this report constitute medical advice, and solely reflect consumer perception

Though chronic conditions like diabetes or obesity require medications taken over long periods of time to address, long term adherence is often not possible. Brands must step up to the plate to find more sustainable solutions for audiences who are in their Ozempic season or beyond it, and are looking for sustainable ways to address whole-person health - including weight loss.

Case in point: discussions of the actual weight loss effects of weight loss drugs, comprising 93% of the conversation, are *declining* YoY, while **metabolism**, **energy** impact, and overall **wellness** are all increasing in discussions of GLP-1 drugs. Brands like **Supergut** have positioned themselves for the moment, offering products to boost the natural effectiveness of GLP-1, supporting weight loss and whole-person health through prebiotic fiber.



Hyper-personalized nutrition:
The post GLP-1 era

Next gen flavor: Gen Z and bold office bites

The rise of **Filipino** cuisine and Asian **street food** dishes

As American consumers embrace adventurous food experiences 29% more than last year, Southeast Asian cuisines are stepping into the spotlight with their bold, healthy flavors.



These vibrant culinary traditions meet demands for cost-awareness and convenience, making them ideal for the many Americans returning to in-person workdays. The desk lunch is being reinvented, with Asian street foods offering exciting, delicious options.

For Gen Z, the quest for affordable-but-adventurous experiences has led to a growing interest in Filipino cuisine, which offers flavorful, satisfying meals that fit the bill. Filipino stews and coffees each cater to different elements of today's Gen Z experience(s).

These bold culinary options are set to make a significant impact on everyday meals, catering to both budget-conscious and flavor-seeking consumers.

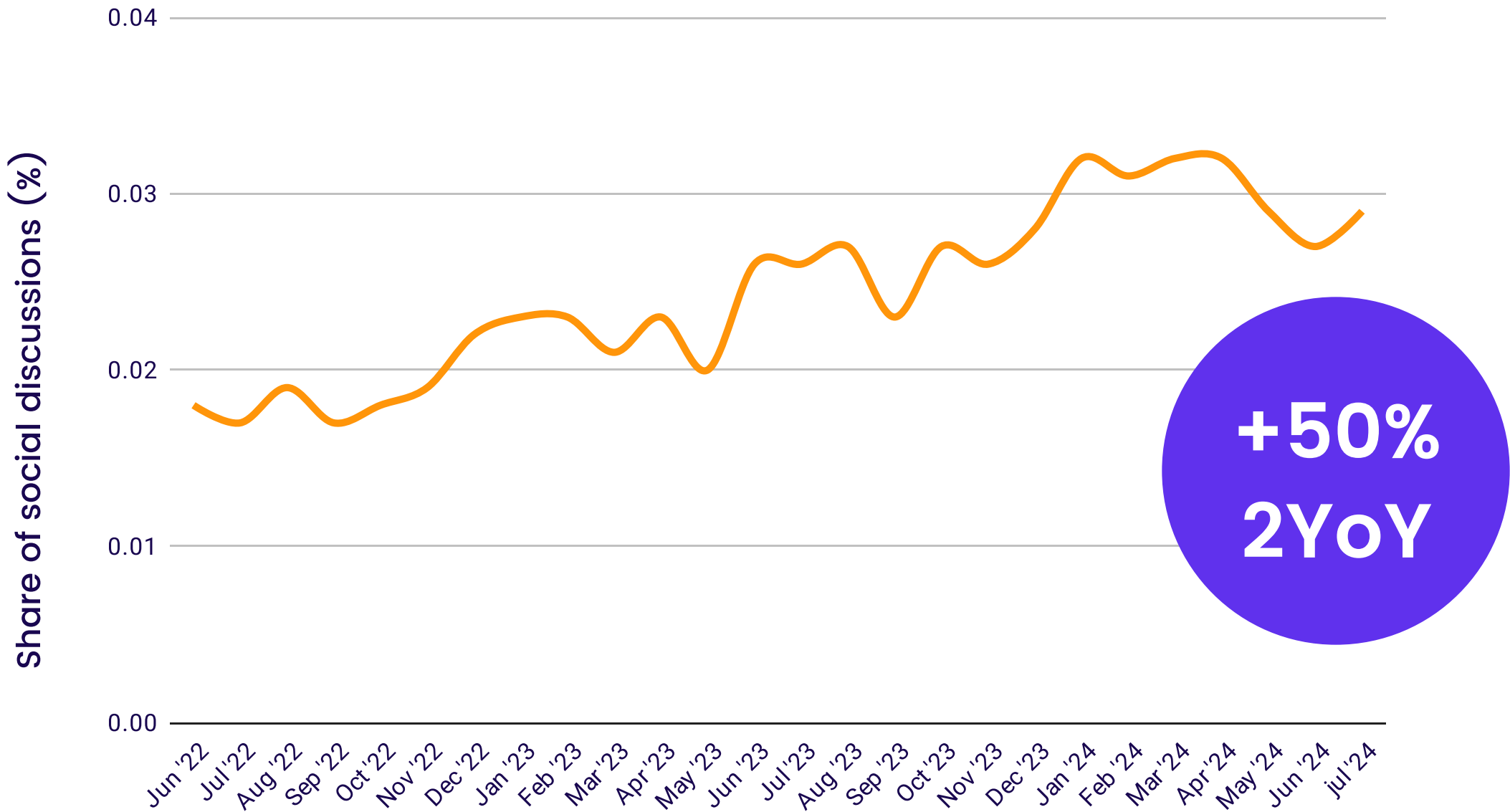
Filipino cuisine + Gen Z

Next gen flavor

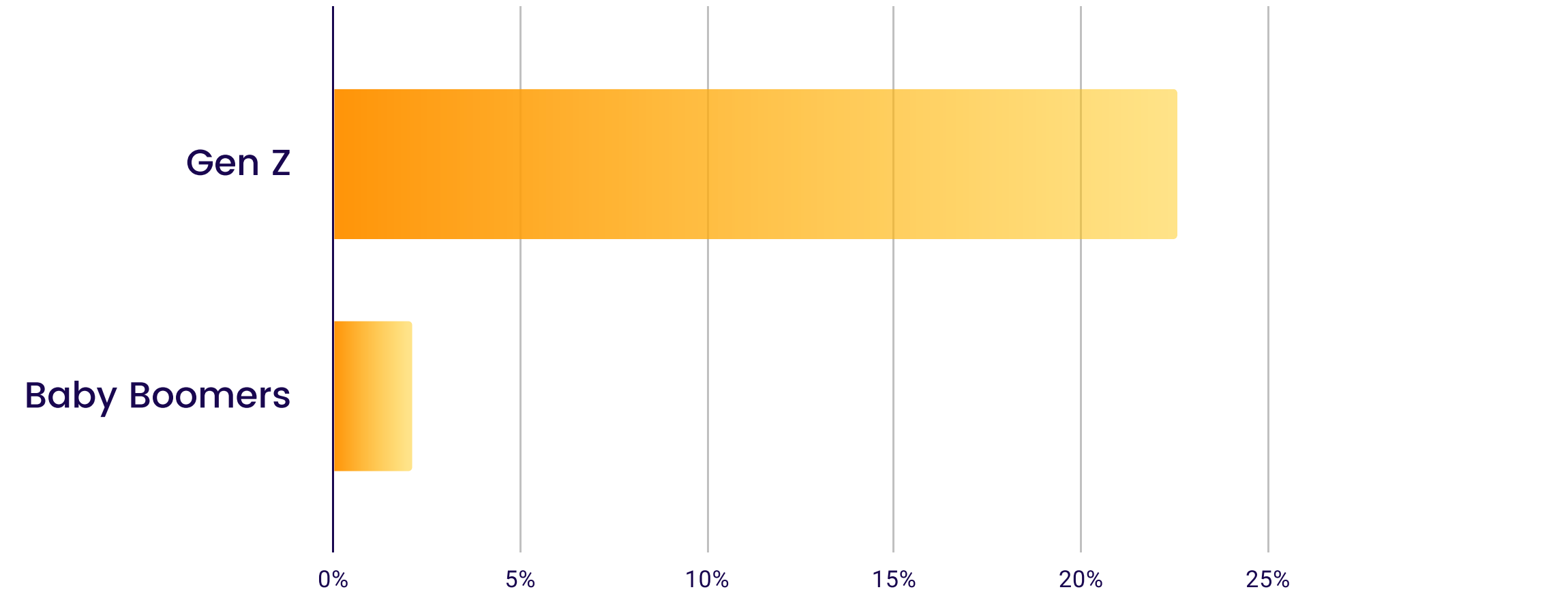


Interest in affordable, indulgent food and beverage is on the rise +50% YoY

Consumer interest in affordable and indulgent F&B over time



Growth in interest in affordable F&B (YoY)



89% of US consumption moments are at home. And in the long wake of the pandemic-fueled rise in home cooking, consumers have become accustomed to higher quality, more indulgent meals that fit their budget.

American consumers discuss affordable food and beverage 19% more this year than last. This indicates a longer-term cultural shift towards normalizing talking about cost-saving efforts in the mainstream.

Leading the way are Gen Zers, who are more willing to publicly discuss and creatively pursue affordable food and beverage than older generations.

This renewed focus on affordable eating has consumers searching for that perfect midpoint between affordability and indulgence.

Enter: Filipino cuisines!

89% of US consumption moments are at home

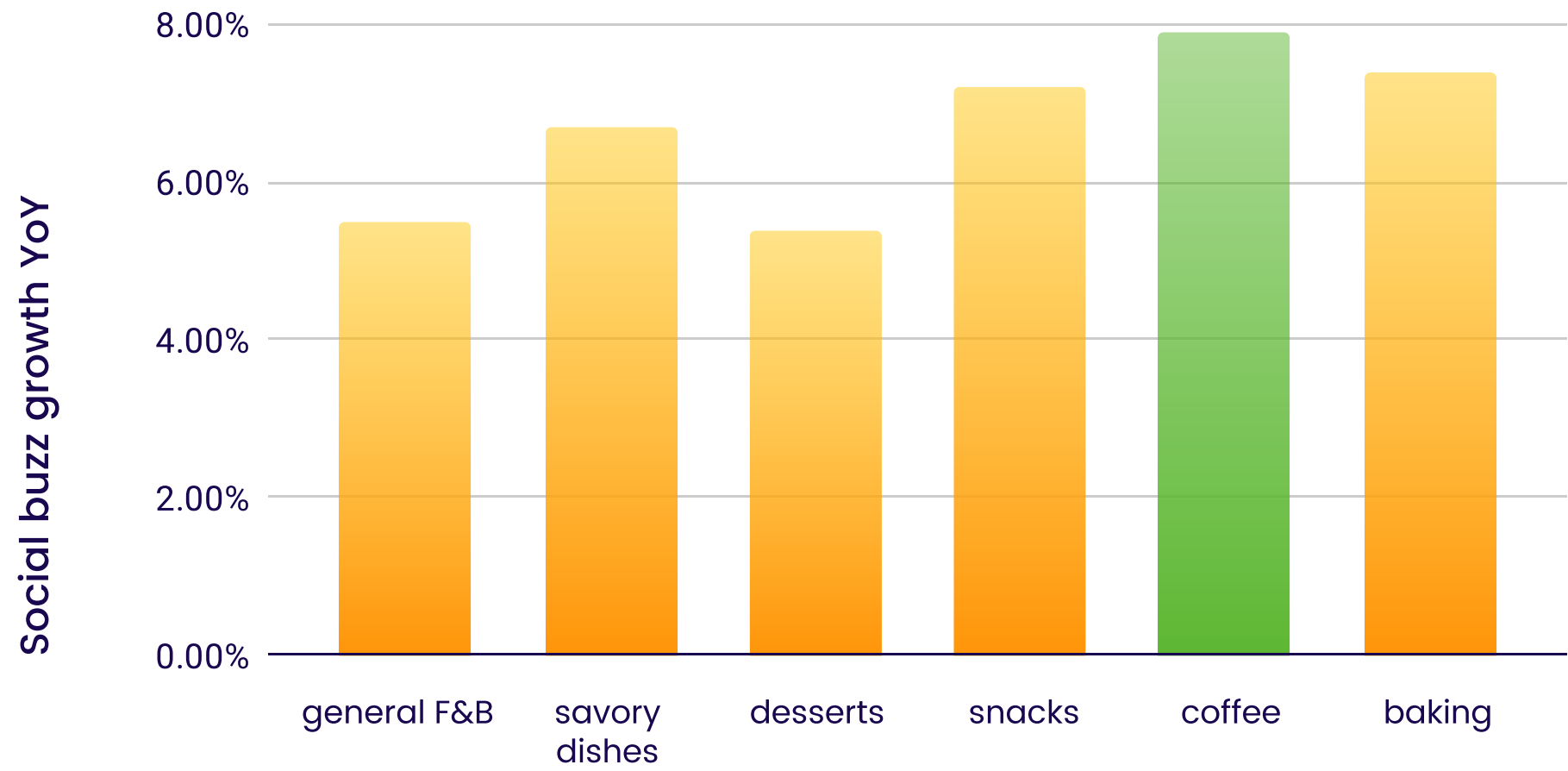


Next gen flavor:
Filipino cuisine + Gen Z

Filipino cuisine: Gen Z's new favorite comfort foods that are indulgent and budget-friendly

Filipino coffees hit the spot for delicious, affordable, and aesthetic adventure; interest grows **26%** in two years

Interest in Filipino cuisine across categories (YoY %)



Gen Z is diving deep into the world of Filipino coffee, but they're well beyond just ube lattes. This generation is experimenting with bold new flavors at home while also exploring local Filipino restaurants for the latest fusion concepts.


Coffee Jelly



48,795

Coffee Jelly is a delicious coffee-based dessert made of coffee-flavored jelly cubes in a thick and delightful coffee-infused cream.

@allthingsubedesserts




BEST SELLER

\$7.5

Iced Coffee Ube Cold Foam
Iced coffee topped off with our ube cold foam inside a cup with an ube halaya (jam) swirl.

@neighborhoodsea



2,335

NEW Filipino fusion brunch cafe in Redmond, WA!
I was excited to finally try Neighborhood Cafe's COFFEE FLIGHT ❤️ My favorite drinks were the Mint Mojito and Black Sesame Latte © So happy they...

They're drinking options like coffee jelly sago, pandan iced coffee, and coconut milk coffee with pandan foam. The beverage format allows Gen Zers to experiment with indulgent and exciting new flavors without breaking the bank, making it an affordable way to explore global influences.

Next gen flavor:
Filipino cuisine + Gen Z



Street food at the office

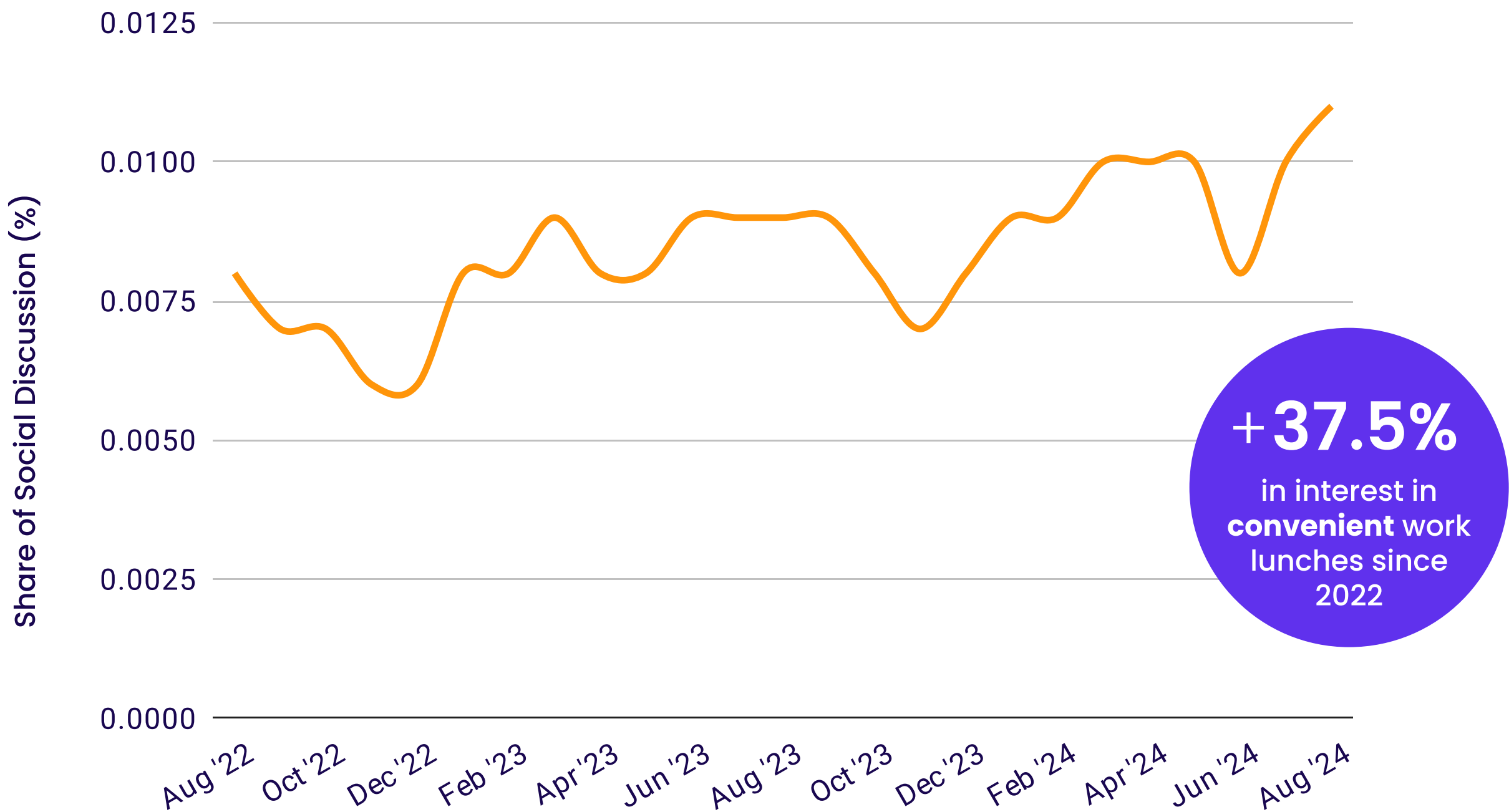
Next gen flavor



From the streets of Asia to your desk: Snacks that make the office exciting again

Bold, street-inspired snacks blend convenience with adventure

Discussions of desk lunches over time



Next gen flavor:
Street food at the office



With up to 75% of the American workforce anticipated to be back in the office in some capacity by 2025, office lunches are worth paying attention to.

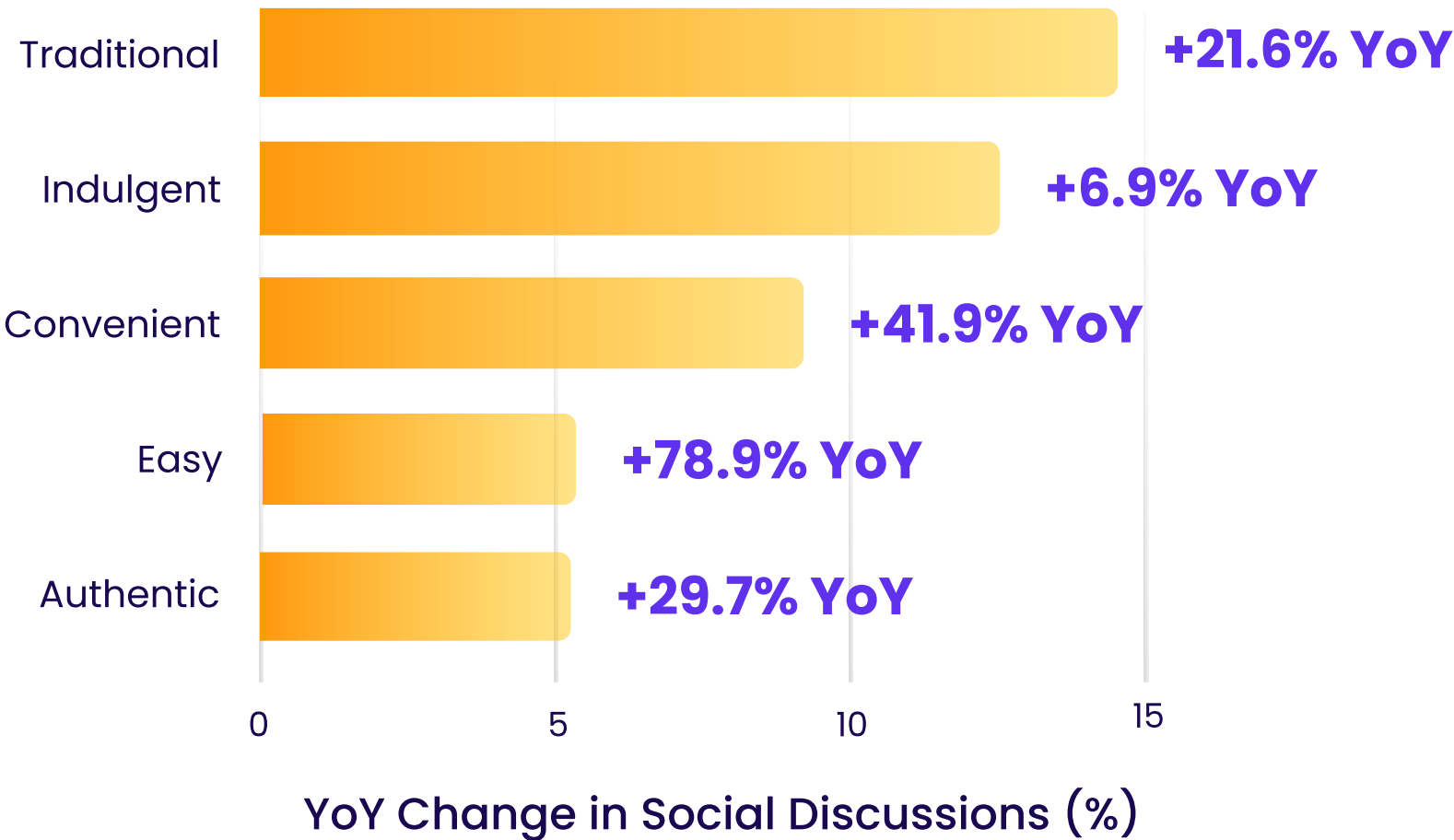
Today, **10%** of employees eating at work call out the **convenience** of their lunch, with demand for convenience growing almost **38%** since 2022. The fastest growing associated claim is **indulgence**, up **+42% YoY** in consumer interest for desk lunches.

This dual demand presents a unique opportunity for retailers to create new, indulgent choices that customers can easily eat at their desks - whether in an office building or a home office.

In 2025, Asian street snacks will provide indulgent, convenient solutions for the American workforce.

Interest in Asian street snacks has grown 32%, reshaping grab-and-go options with bold Asian flavors in convenient, easy-to-eat formats

Trending experiential claims for Asian street snacks



Consumer interest in Asian street food snacks has risen **32.4% YoY** in consumer discussions and **50%** in menu mentions, reflecting a growing appetite for bold, global flavors.

However, homemade versions of these snacks are declining, as people increasingly seek out retail or premade options for convenience.

Offering office-friendly, ready-to-eat street snacks with authentic flavors meets the demand for indulgent flavors while catering to consumers' need for convenience in their busy lifestyles.

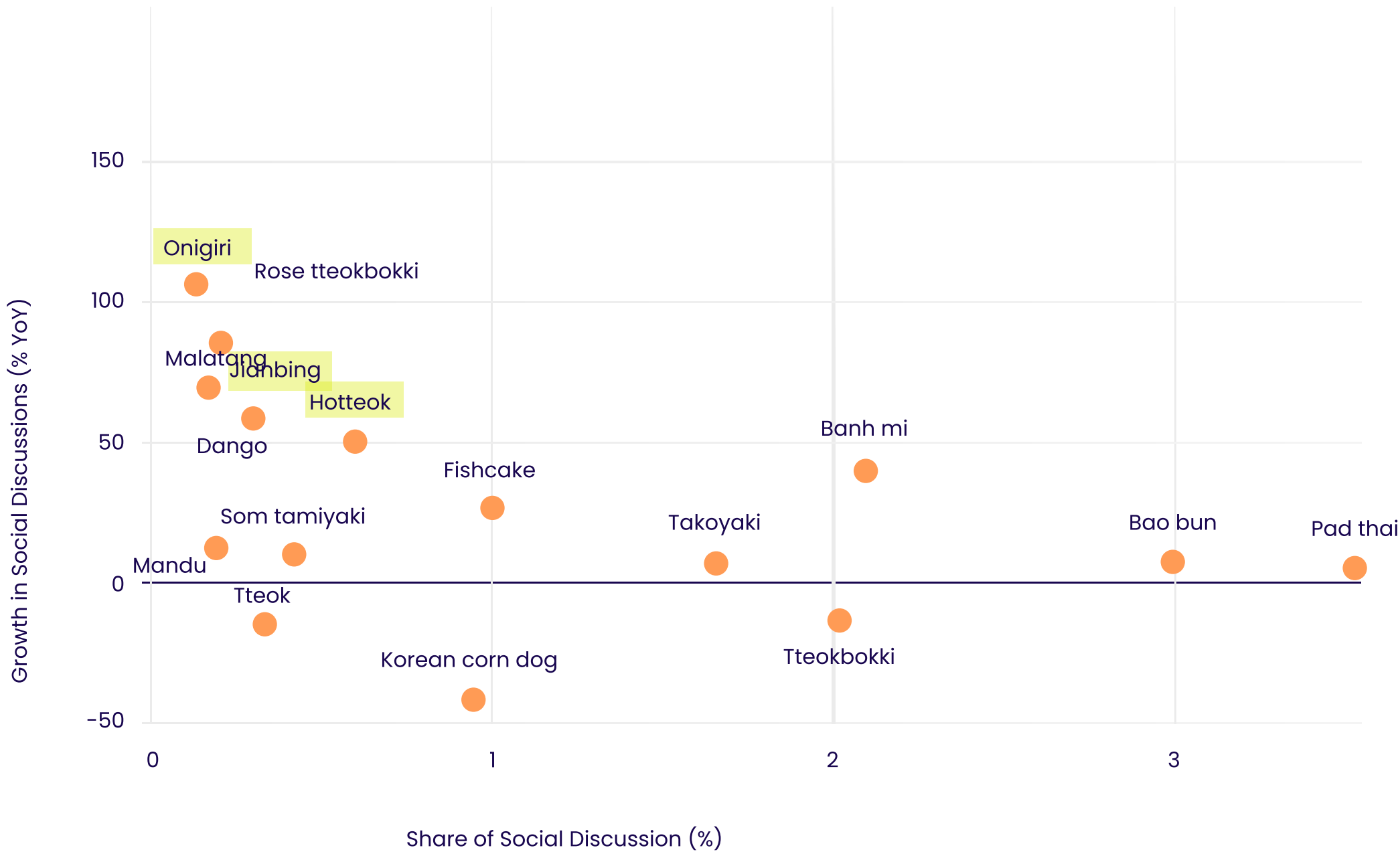


Next gen flavor:
Street food at the office

You can take me HOTTEOK-GO!

Americans crave pan-Asian street foods in snackable contexts in 2025

Consumer interest in selected Asian street food dishes



Korean hotteok? Double click into that. **Vietnamese banh mi?** That’s in the pipeline. **Japanese onigiri,** **Chinese jianbing?** Circling back to confirm—green light all around.

American consumers are getting regional with emerging interest in street snacks from across Asia, offering a new opportunity for office dining. Established favorites like pad thai and bao buns are stagnating; capture emerging tastes by offering trending **traditional** dishes in **accessible formats** with familiar ingredients.

Want to explore an untapped opportunity? **Cambodian** cuisine is up 10% YoY in interest and offer new flavors for the mainstream American palate.

Next gen flavor:
Street food at the office

Tailor classic global dishes for American audiences to capture emerging tastes with AI

Avocado onigiri

Concept



Bite sized and plant-based friendly (+26% in interest for onigiri), a simple avocado onigiri can cater to workday snack cravings.

Sesame paste hotteok

Concept



For a morning option, consider a twist on a classic hotteok (stuffed pancake): sesame paste, growing +73% YoY

Chicken jianbing

Concept



Cater to trending high protein demands (+15% YoY in interest) by adding chicken to the traditional egg-based stuffed crepe

Next gen flavor:
Street food at the office

Hydration heroes

All night hydration power plays, and Celtic salt beyond TikTok

Interest in hydrating foods and beverages has grown **12.8%** in the last year, with new ingredients stepping up to meet consumer demand. In 2025, new versions of the "sleepy girl" mocktail will be put to work as consumers view nighttime as the next frontier for hydration-boosted wellness. Hydrating beverages that offer additional functional health boosts will be the new, sober-curious-friendly buzz. Hydration is the new nightcap.

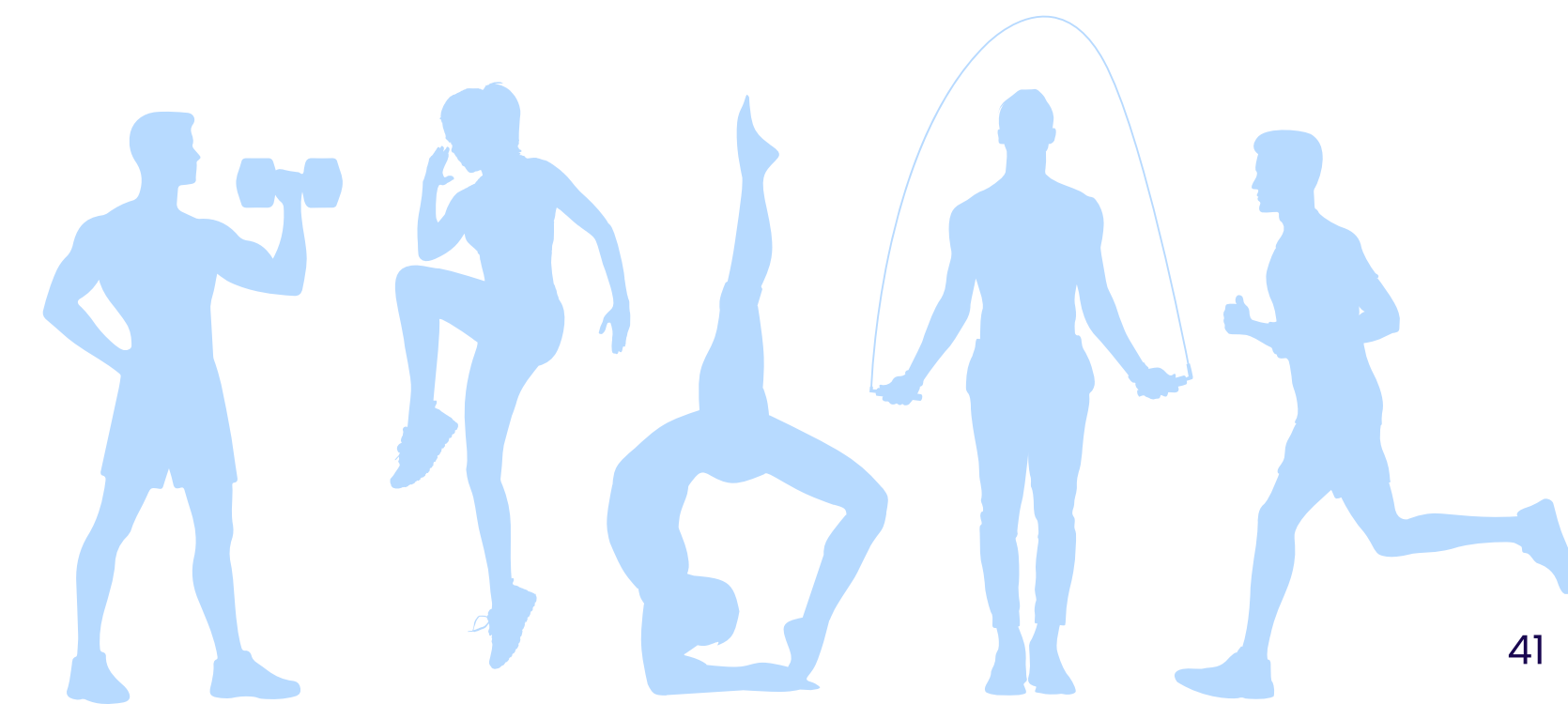


A rising hydration star is Celtic salt, a nutrient-rich variety that has long been popular in fitness circles but is now moving into the mainstream, thanks to TikTok. With its ability to promote water retention, Celtic salt will be a key ingredient in functional beverages designed for lifestyle moments.

As consumers continue seeking hydration solutions that serve multiple purposes, these ingredients are ready to define the next wave of wellness drinks in 2025.



Hydration:
The New Frontier
in Functional
Wellness



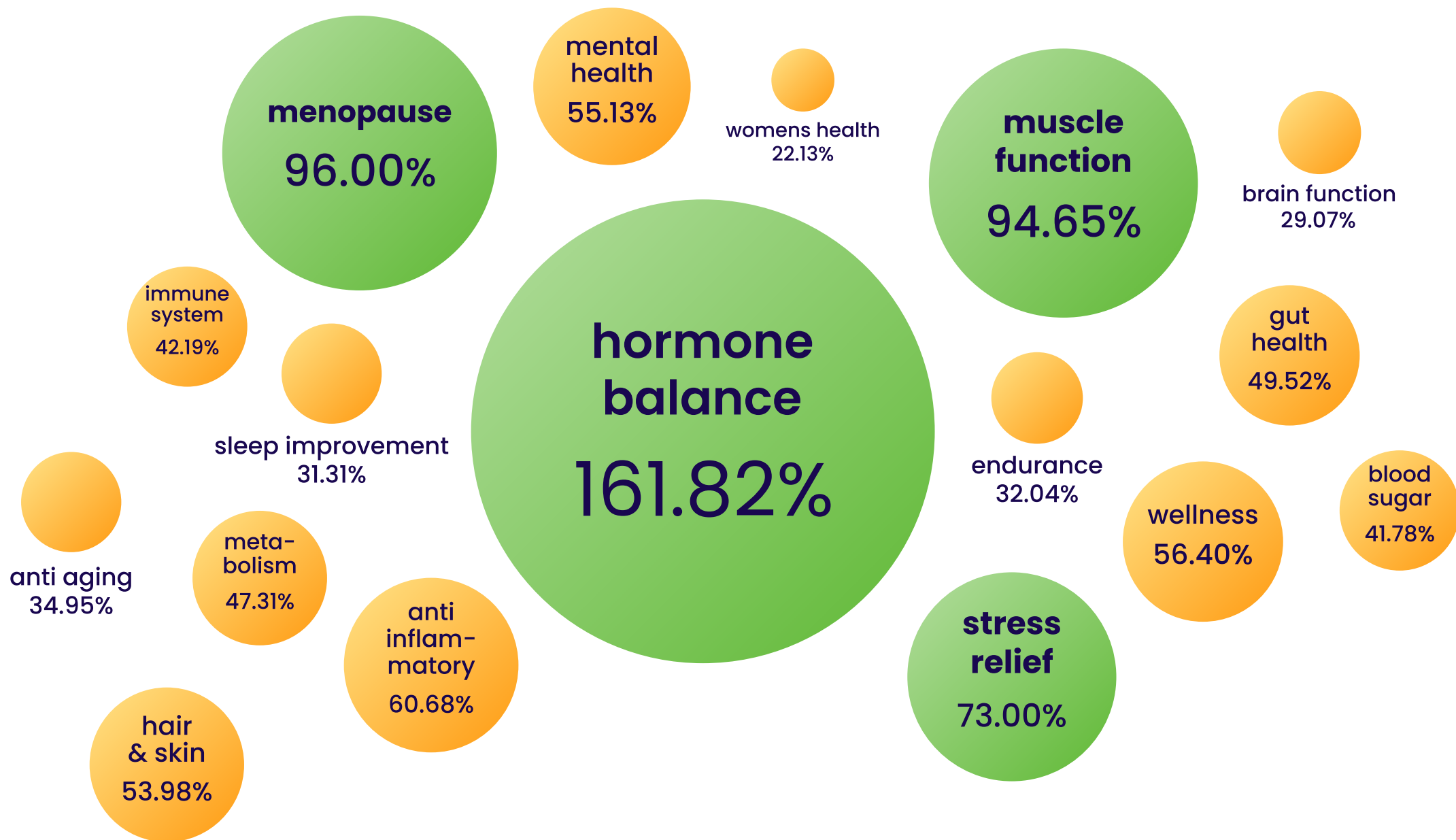
Nightly hydration power plays

Hydration Heroes



Nighttime hydration mocktails: The 2025 nightcaps that'll boost your mornings, sober-curious approved

Growth in consumer associations with hydration, YoY



41.7% YoY
Conversations of nighttime hydration

How can you make sure consumers will get the most from their shuteye?

In 2025, the average person will spend about **114 days asleep** (that's **2,738 hours!**). Interest in non-alcoholic beverages that promote both **sleep and hydration** is rising fast, and opens the door to a whole new world. Hydration is more than just quenching thirst—it's the gateway to a range of functional benefits.

- Leading trends within the realm of hydration include:
- **hormone balance** (+162% YoY in consumer discussions of hydration);
 - **menopause support** (+96%);
 - **muscle function** (+94.7%);
 - **stress relief** (+73%).

Multi-functional beverages to support whole-person health overnight are set to trend in 2025.

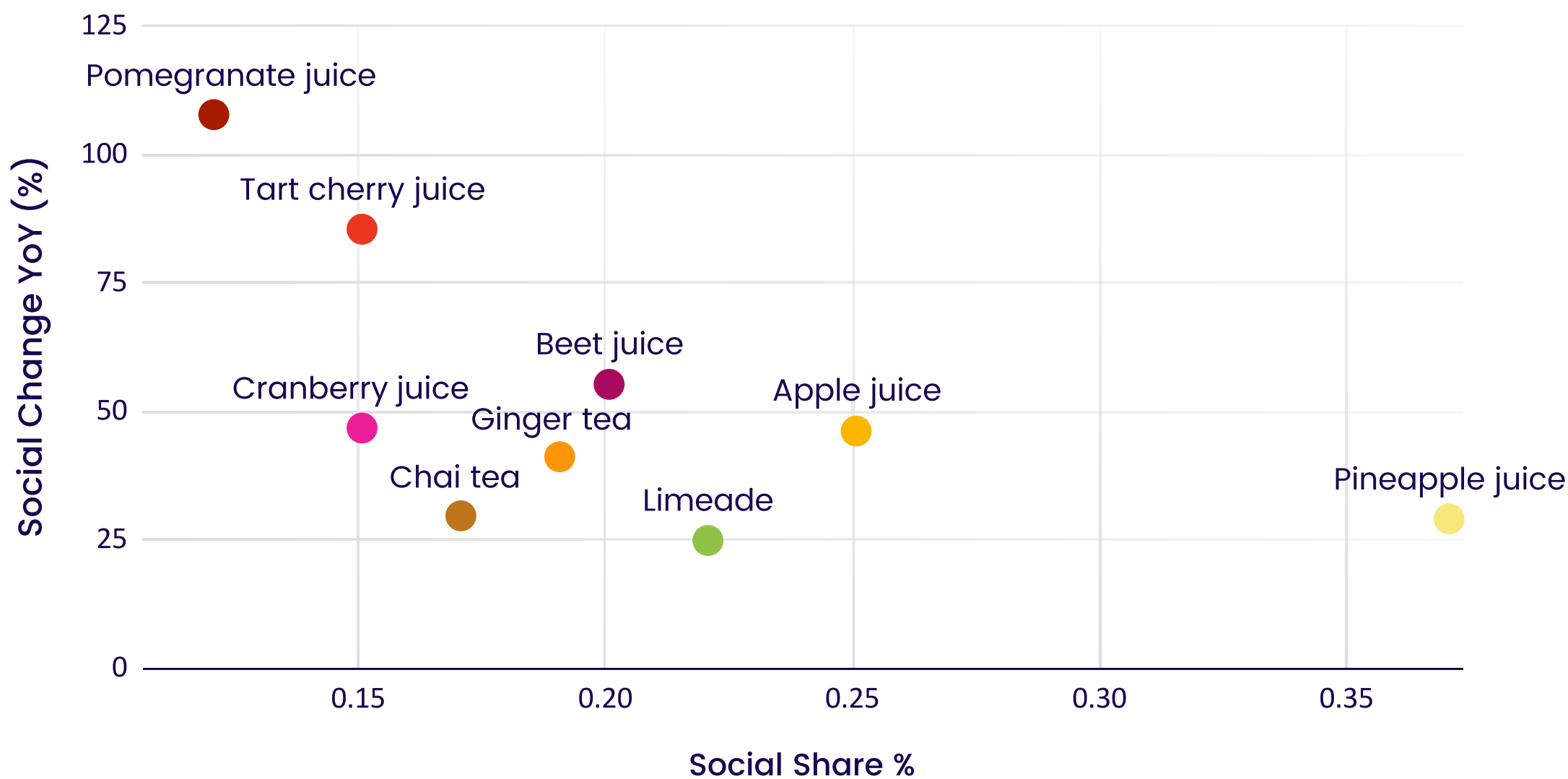
Social media platforms like TikTok produce viral content around nighttime routines and mocktail recipes right and left. The real question in 2025: **Once you're asleep, now what?** How can brands harness viral trends like 2024's "sleepy girl mocktail" to help consumers achieve their health and wellness goals while they sleep?



Hydration heroes:
Nightly power plays

Call out the additional functional benefits of trending hydrating juices in your next mocktail recipe, and see 5x+ engagement

Trending ingredients for hydration in non-alcoholic beverages



Hydration heroes:
Nightly power plays



- Pomegranate juice ● gut health (+22% YoY)
- Tart cherry juice ● mental health (+19.7% YoY)
- Beet juice ● anti inflammatory (+22.9% YoY)
- Apple juice ● cleansing (+27.2% YoY)
- Pineapple juice ● hair and skin (+19.6% YoY)
- Limeade ● energy (+83% YoY) great for a non-alcoholic "night out" drink!
- Ginger tea ● gut health (+21.8% YoY)
- Cranberry juice ● wellness (+50.5% YoY)
- Chai tea (decaf) ● immune system (+23.6% YoY)

Tip: Take a closer look at these non alcoholic beverages, emerging as trends in consumer discussions for their hydrating properties. Each can be positioned as a hero ingredient for other, related functional health claims.

Making it real with Tastewise's AI-driven Content Agency



Soothing Cherry-Pineapple Nightcap

This sleep support pineapple concept introduces the calming properties of cherries, which have a 35.1% YoY social change and a -2.6% social monthly change. The 'sweet' claim, with a YoY growth of 15.62% and a share of 13.68%, enhances the natural sweetness of the cherries and pineapple, creating a soothing beverage perfect for a good night's sleep.



Avocado Sleep Muscle Recovery Smoothie

This concept is a smoothie made with avocado, known for its muscle recovery properties. Avocado has a 177.3% YoY social change and a 14.5% social monthly change. Smoothies promote fullness ahead of sleep.



AI Recipe

✦ Sour Cherry Sleep Aid Mocktail

This refreshing mocktail is a blend of tart cherry juice, lemon, and carbonated water. It's not only delicious but also aids in **muscle recovery** and promotes better sleep. The tart cherry juice is rich in antioxidants and has natural sleep-promoting properties.

 Serving size 1 People	 Duration 5 Min	 Difficulty very easy	 Potential Engagement 2
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Hydration heroes:
Nightly power plays

Pair hydrating ingredients with additional functional callouts at night for a major hit.

Celtic sea salt

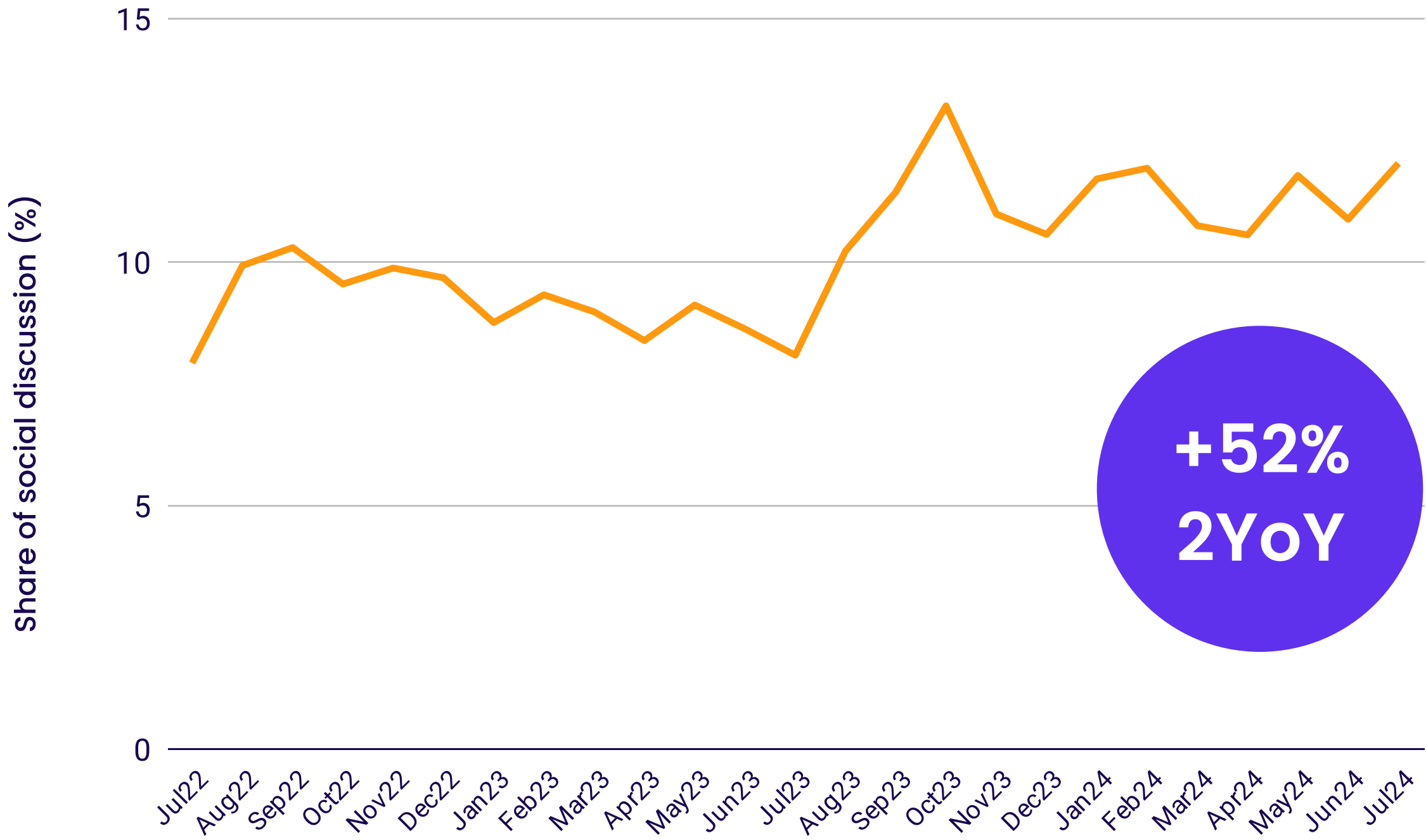
Hydration Heroes



Rethinking hydration: How Celtic salt is shaping the next wave of beverage innovation

Hydration, growing 16.5% YoY in consumer discussions, just got a lifestyle upgrade – thanks to this elevated salt

Interest in natural hydration in non-alcoholic beverages over time



Hydration heroes:
Celtic sea salt

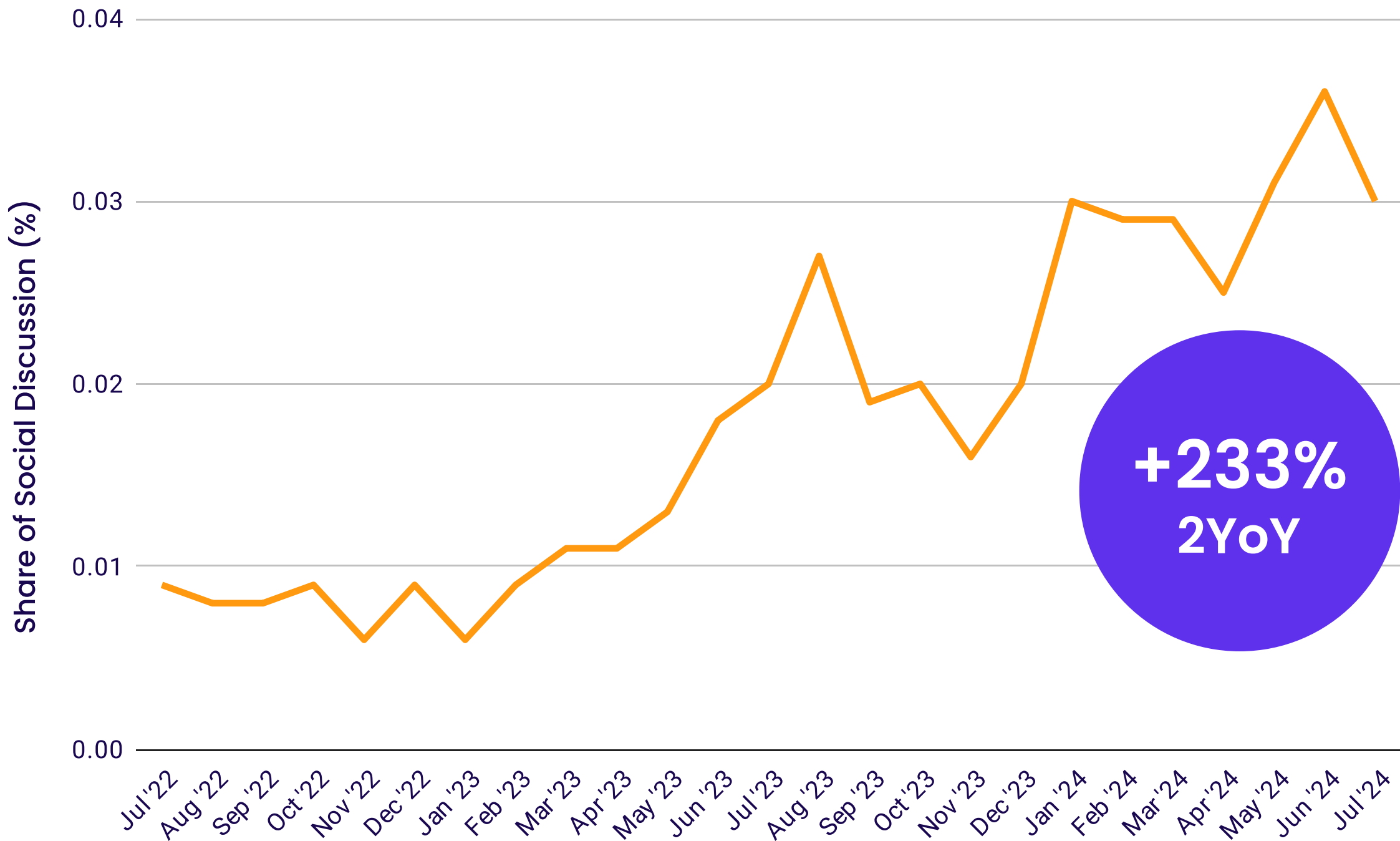


Celtic salt is emerging as a key ingredient in the natural hydration movement, with consumers now **4x more** likely to favor natural approaches to hydration.

As interest in hydration grows 16.5% year-over-year, and traditional sports drinks are increasingly criticized for dyes and sugar content, functional alternatives like Celtic salt attract new interest.

Celtic salt: A wellness niche turned hydration game-changer captures +233% more consumer attention

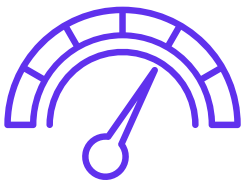


Consumer interest in celtic salt in non-alcoholic beverages



Celtic salt has boomed in popularity, with consumer discussions up 233% 2YoY thanks in part to its viral moment on TikTok in 2024. But can the trend hold any water?

46% of conversations today associate Celtic salt with hydration, the primary association with the salt variety among US consumers. A natural, unrefined sea salt rich in minerals (and often sustainably produced!), Celtic sea salt is claimed to boost hydration, electrolyte and mineral content, and flavor. Initially a favorite among niche wellness communities, the ingredient is catching steam in the mainstream.

While most of these benefits lack solid scientific backing, Celtic salt – like all salts in moderation – does aid hydration, and its unique flavor can add character any hydration-focused product.

-  hydration
-  electrolytes
-  mineral content

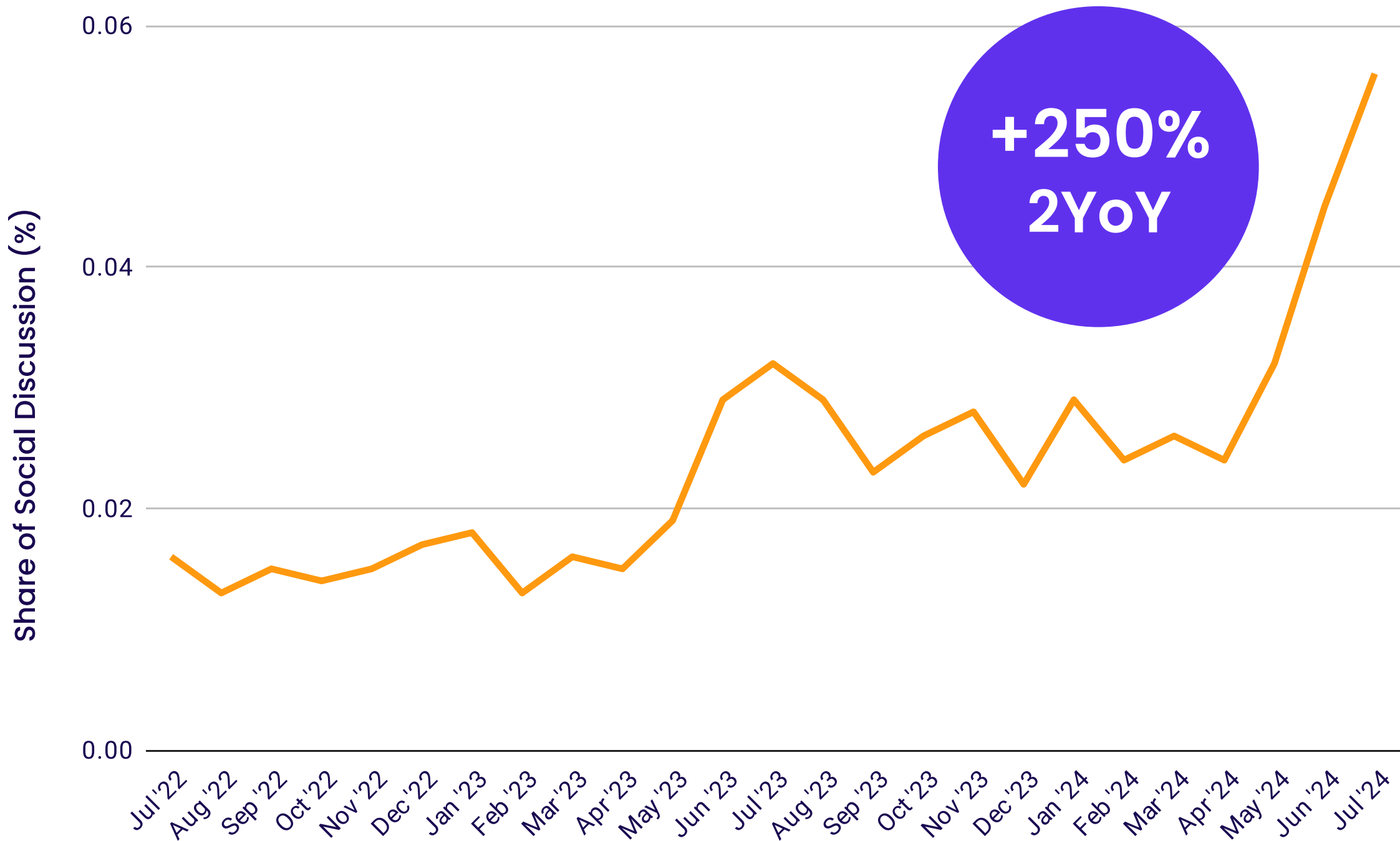
Hydration heroes:
Celtic sea salt

Consumers look for comforting hydration in the glass

250% more in the last two years

Meet their needs with innovative celtic sea salt applications

Interest in Hydrating non-alcoholic beverages for comfort



Interest in hydrating, non-alcoholic beverages that address comfort concerns like bloating, skin issues, and mental health has increased **250%** over the last two years. In 2025, drinks that offer both hydration and comfort will take center stage.

One area ripe for innovation is switchels—a traditional hydrating blend of water, apple cider vinegar, ginger, and a natural sweetener. Adding Celtic salt gives it a modern twist. With **63%** of intentional hydration happening at home, offering at-home recipes for Celtic salt switchels is a prime opportunity to capture emerging consumer interest.



Hydration heroes:
Celtic sea salt

What will AI in food and beverage look like in 2025?

Hyper-personalization through AI

Personalized recommendations, customer segmentation, and dynamic marketing content

Ethical AI use

Transparent data practices to foster trust and loyalty among customers

Decreased food waste

Hyper-personalized products will mean fewer failed launches and better market adoption

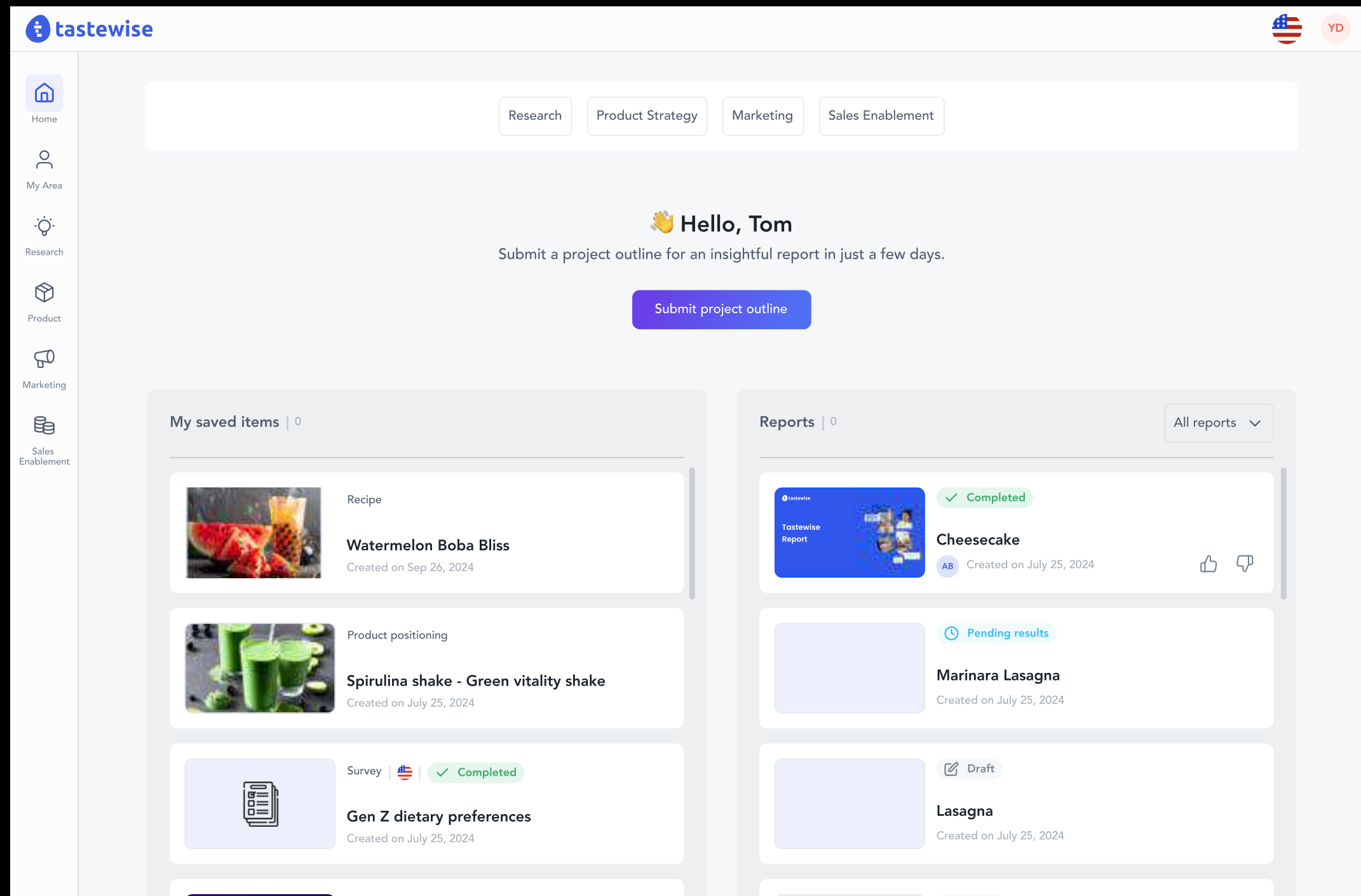
Enhanced customer engagement

Interactive marketing and increased consumption frequency through pinpointed campaigns

Predictive analytics for market trends

An essential part of execution speed and scalable analytics models





Want to get ahead of the curve with *limitless answers and unlimited options*?

All your GenAI needs on the #1 platform for food & beverage: research, decisions, and marketing at speed and scale.

Sign up for a 14 day **free trial** of Tastewise AI, and bring these trends to life for your brand in 2025.