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Field Notes
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The Calgary Region Local Food Demand Study

What's happening with food trends?

A recent study on regional food demand conducted in the Calgary region identified some interesting consumer trends which present some exciting opportunities for Alberta's agri-food industry.

The study, conducted in 2014-15 by Infact Research and Consulting Inc., revealed ten buying trends which define the types of food today's consumers are seeking. The trends encompass cultural values, consumer demographics and advancements in technology. Similar research for the Edmonton region is currently underway with results expected later this year.

Ten most frequently found trends 2014-15

Health and Wellness

Health and Wellness includes nutritious foods rich in anti-oxidants and potassium and low in sodium, chosen to help address medical conditions. Aging Baby Boomers were identified as the source of the trend as they face health challenges like obesity, diabetes, high cholesterol and high blood pressure.

They look toward functional foods like fish, which is high in omega-3 fatty acids, green tea, dark green leafy vegetables, sweet potatoes, carrots, dark chocolate, flax seed, berries, whole grains/fibre, butter, zero trans-fats and probiotics, among others, to realize a healthier diet.

Also under the umbrella of health and wellness is a category termed *better for you foods*. These focus on removing or reducing unwanted substances such as fats and sugars—preferring naturally occurring sugars (e.g., honey, maple syrup, agave) to added sugars or artificial sweeteners such as carbohydrates.

Just like aging Baby Boomers, people in the 'better for you foods' group are looking to functional foods to meet needs beyond energy production. They seek clean, enriched, modified and specialized products.

Vegetables

Vegetables were also a frequently reported trend with an anticipated change in the types of vegetables that would be popular. Cauliflower was the most notable, followed by other cruciferous and brassica vegetables like Brussels sprouts, cabbage and kale (although kale is on its way out). Root vegetables were noted too, especially turnips, parsnips and beets.

Continued on page 2

Food Trends from page 1

Small meals and snacks

Small plates, mini-meals, flexible portions, portable foods and non-traditional healthy snacks focused on different times of the day are growing in importance as structured meals no longer meet today's grazing lifestyle, especially among 18 to 44-year-olds. Family-style sharing was part of the trend and "golden-agers" were a driver too.

Beverages

Chefs were particularly vocal about beverage infusions using savory fresh ingredients from the kitchen, especially herbs and spices. The category included handcrafted signature liquors, craft beer/ micro-brews, house-made soft drinks and infused water jugs.

A very particular infusion trend centered specifically on tea appeared to be more than a chef-focused trend. Tea is used as flavouring for cocktails, ice-cream, sorbet and desserts such as shortbread or cheesecake. Different types of specialty or iced teas were mentioned as trending: *matcha* green tea, fermented *kombucha* tea, Thai-style, southern-sweet or flavoured iced teas and premium loose tea.

Other beverages seen to be increasing in popularity included coconut water, green vegetable drinks or smoothies, and fresh pressed fruit juices.

Simplicity and Transparency

Natural foods and transparency in production and labelling converge in this trend. This reflects a demand for simplicity and "back to basics," or authenticity, in food. It includes minimal processing so that foods are free of chemicals and additives of any type and animals are humanely treated.

This trend will require not only a change in recipes, but also in packaging/labelling and marketing. For example, clarity on the term "natural" is required for each product. Consumers will read labels to identify allergens and verify fortification and health claims. Labels should be simpler and presented more concisely.

There must be complete transparency on quality and contents, which may be achieved by consumers connecting to the producers—especially on a local level—to understand their philosophy and products.

Dietary Trends

Gluten free was the main selection among specialty foods that were trending up in a category termed *DIY health* in one article and *allergy conscious* in another. Other items mentioned in this context were Halal and Kosher, vegan and paleo-diets.

WHAT DO THESE TRENDS MEAN FOR ALBERTA?

There are many opportunities for Alberta's agri-food industry to capitalize on some of the noted food trends. Some of the industries that can benefit from these trends include:

- Pulse industry – 2016 declared International Year of Pulses by the United Nations
- Horticulture industry – vegetables, fruit
- Brewing industry – craft beers, micro-breweries
- Honey industry – natural sweetener
- Dairy industry – yogurts, cheese
- Grains industry – ancient grains, gluten-free

Technology

Technology changes, especially the use of mobile devices, drive this trend. Access to recipes has long been enabled on the Internet.

There are blogs and social media discussions and promotions related to food and recipes. It was reported that more than half the content on Pinterest is food-related, with one-third of respondents to a survey reporting that they buy food or cooking items after seeing them on Pinterest.

Mobile device apps support the compilation of shopping lists and price comparisons, allow users to search for restaurants, make bookings, tell friends where they are eating, share pictures, track calories, identify ingredients and allergens and find out what's in season.

Online grocery shopping and grocery delivery (which could be through different

Continued on page 3

Food Trends from page 2

companies) is tech-enabled and was expected to extend to Mom and Pop shops in one forecast and to reach same-day delivery in some markets in another forecast.

Laser labelling for fresh produce—logos, provenance specifics or QR codes—has been developed in Spain and has the potential to eliminate non-eco-friendly stickers.

New Proteins

The nose-to-tail movement in restaurants has led to increased interest in less expensive cuts of meat and previously unpopular sources of protein. Some examples include beef cheeks, brisket, pork shoulder, skirt steak, lamb's tongue, chicken feet, pig's ears and charcuterie/house-cured meats.

Smoking and smoky flavours were particularly singled out as a preparation method (whether using a smoker, liquid smoke, canned smoked vegetables or smoked cheese). Other novel sources of protein-rich foods on the rise were pea whey, algae and more exotic foods like insects (e.g., energy protein bars made from crickets, fried insects), rattlesnake, and live octopus.

Local Food

Local sourcing did not represent a cohesive or focused trend as it was mainly mentioned within other contexts.

For example, it was one of a number of sustainable criteria listed in one article; part of a micro-local, anti-chain ethos which would benefit specialty restaurants and city-wide distributors in another; a facilitator through the eat local movement of eMicromarket online grocery deliveries; and was even reported as being seen by some as a marketing rather than a production attribute.

In 2014, among Canadian chefs, locally sourced food, sometimes combined with locally inspired dishes or locally grown produce, fell from its leading overall position as a currently hot trend in 2010, 2011, 2012 and 2013. Nevertheless it remained a top three trend among restaurants.

Ancient Grains

Ancient grains, quinoa, buckwheat, rice and non-wheat noodles and pasta were variously identified as trending.

Fermented foods

Fermented foods are gaining in popularity as sour and tangy tastes become the flavour of choice. Foods such as yogurt, kefir, miso, sauerkraut and *kimchi*, also vinegars and pickles are included in this group.

Beyond the 10 most frequently found were some other trends worthy of noting:

Less frequently noted trends

Sustainability - growing food in window ledge herb gardens, rooftop chicken coops, one's backyard, a community garden or buying at farmers' markets.

Demographic Shift - focusing on the rise of the millennials, aged 15-35, is being given credit for driving most upcoming trends. This is a tech savvy, socially engaged, well informed generation who are reported to be less brand loyal, want something different and want to know the story behind the food and connect with it. They include both reheaters (of previously cooked food) and some who cook from scratch.

They are interested in socially responsible eating and are willing to support their local community. They want to use technology to address social issues, ag-environmental interface issues, treatment of farm labour and food waste.

Acculturation - necessitated by the presence of an increasing number of immigrants to Canada.

This is seen in the presence of more ethnic grocery stores, ethnic restaurants and more retail shelf space for ethnic food, all of which diffuse their ingredients, cooking methods, presentation styles and dishes into mainstream culture.

At the same time, modification to traditional diets takes place, especially in the second generation.

Immigrant groups offer niche market opportunities for specialty foods, but this requires an understanding of their concentration from different points of origin and their distinctive demographic differences (e.g., multi-generational households, family size, food spending patterns).

IGD Retail Analysis for 2016

The IGD (Institute of Grocery Distribution) is a global research and training charity that helps the food and grocery industry deliver the needs of the public. Their in-depth understanding of shoppers, retailing and supply chains is supported by their knowledge of broader topics affecting the industry such as health, nutrition, sustainability and economics.

Recently, the organization released the results of their research identifying themes which they believe will shape the Canadian grocery sector in 2016.

1. **A challenging economic backdrop driving a flight to discount**
   Worsening economy, higher unemployment, lower Canadian dollar and high consumer debt are encouraging value seeking Canadian shoppers to rely more on discount stores.
2. **Continued reinvention of the supermarket.**
   Canadian grocers designing experiential "health and wellness destinations" focusing on fresh foods and restaurant-like offerings.
3. **Pushing ahead with grocery e-commerce.**
   Walmart, Loblaw's, Sobeys and others creating/building on their click and collect services to expand their reach to offer a convenient shopping option.
4. **Grasping the ethnic opportunity.**
   While independent grocers continue to be a key element in this growth area, major banners expanded their offerings in this category.
5. **Positioning the grocery store as a healthcare centre.**
   In-store dieticians, pharmacists, cooking demonstrations and a bigger fresh food focus combined with wearable health technologies offer new ways to interact with consumers around their health.

To read the complete study visit http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/sis15612

Upcoming Events

WORKSHOP SERIES

HORTSNACKS AT NIGHT ~ GREENHOUSE ENERGY AND MATERIAL EFFICIENCY

7–9 PM, FREE (snacks provided)
MAR 29 Grande Prairie, MAR 30 Bruderheim, MAR 31 Redcliff

Toso Bozic, Bioenergy/Agroforestry Specialist with Alberta Agriculture and Forestry, will discuss this recent project looking at ways to make Alberta's greenhouse industry more efficient and what you can implement in your own operation.

For more information contact: Dustin Morton, dustin.morton@gov.ab.ca or 780-679-1314 (toll-free in AB, dial 310-0000 then the number)

TRANSITION TO ORGANIC GRAINS WORKSHOP

1–4 PM, $20 (snacks provided)
APR 1, La Crete Heritage Centre

A must-attend if you are thinking about organic grain production and marketing.

This introductory workshop will provide information to help you navigate the transition and certification process, learn about growing and marketing organic grains and get the industry contacts you need to get started.

For more information contact: melisa.zapisocky@prairieorganicgrain.org or 1-855-521-2400.

ORGANIC GRAIN AND FIELD CROPS CONFERENCE

8:30 AM registration
9 AM–7:30 PM conference
6 PM dinner & presentations
$70/person, $120/family farm unit
APR 2, La Crete Heritage Centre

This one-day conference will provide information on improving organic production practices. Network with certifying bodies, grain buyers, researchers and organic producers.

Featuring sessions on soil health, fertility and weed management, research trials, organic crop insurance and more.

For more information contact: melisa.zapisocky@prairieorganicgrain.org or 1-855-521-2400.

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Growing Forward 2
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