

WAITROSE  
& PARTNERS

FOOD & DRINK  
REPORT  
2023-24







**‘Where we’re seeing people buy less, they’re looking for outstanding quality and assurances the product was ethically sourced’**



# Dining in drives sales of comfort food classics



If there’s one issue that’s continued to dominate this year, it’s food price inflation. It’s changed how people shop and how they cook and eat. Price-conscious customers have been searching for the best value – switching more to own-label products, buying bigger pack sizes and looking to promotions to cushion their bills. They’ve also been simplifying meal choices and becoming a little less adventurous, opting for familiar foods and recipes they find comforting.

Even when buying international cuisines, such as our new Japan Menyū range, they’re opting for well-known classics such as chicken katsu curry and prawn tempura.

We want to make life easier for our customers. That’s why we’ve invested £100 million since February in lowering prices across our aisles without compromising on our quality or values. We’ve also offered a record number of meal deals and in August, we introduced our first lunchtime meal deal for £5.

People have changed how they celebrate – saving trips to restaurants for big occasions such as birthdays and anniversaries, cutting back on casual dining out and staying in more. We responded with a great-value Waitrose Dine In experience – dinner for tonight options including Italian, Indian, a £10 steak deal and our premium No.1 range. But customers are still keen to show up for major events, most notably the Coronation in May, and they came to us in large numbers for occasions such as Valentine’s Day, Mother’s Day and Easter. This reflects a desire for certainty about the quality – and therefore the enjoyment – of what they were going to be eating and drinking.

The next big calendar event is, of course, Christmas. Customers have been planning for it earlier, so we launched a new selection of frozen vegetable sides and frozen party food in September to help them buy the best festive food and also spread the cost. While price continues to be foremost

in the minds of *Food & Drink Report* survey respondents, it’s great to see a growing interest in how what we eat and drink affects our bodies. That’s evidenced by more than half of people (55%) telling us they read product labels more than they did last year, and also in the rise of low- and no-alcohol drinks sales and a reduction in red meat consumption.

Where we’re seeing people buy less, they’re looking for outstanding quality and assurances that the product was ethically sourced. Nearly a third of people (31%) said that anything on the packet which indicates higher animal welfare would make them choose it over another brand or product. Maintaining the highest animal welfare standards and supporting farmers and suppliers is a top priority for Waitrose. We’re already the world’s number one supermarket for animal welfare, and we announced this year that all our own-brand Italian continental meat is now produced to the strictest standards – a UK supermarket first.

We’re also doubling down on our mission to become net-zero by 2035. In January, we began the process of replacing the majority of our small wine bottles with aluminium cans. And we continue to use our Hampshire farm, the Leckford Estate, as a test-bed for regenerative farming, growing food that also boosts the environment.

When the food is good, everything feels good. So, as we turn our sights towards 2024 and whatever next year may bring, we have one simple aim – that everyone who shops at Waitrose, now and in the future, can continue to enjoy good food and drink.

Have a very happy Christmas.

**JAMES BAILEY**

Partner & executive director

## THE FACTS AND FIGURES

Waitrose carried out extensive research into the top food and drink trends of 2023 and the trends we’re expecting to see grow in 2024. We interviewed our buyers, drew on internal insight reports and conducted OnePoll consumer research on a wide range of topics in late October and November 2023 with 2,000 UK adults across the UK of all ages. The research is backed up with sales data from millions of purchases throughout the year. All sales figures are compared with the same period as the previous year, unless otherwise stated.



Going  
up...

# THE TRENDS



## Classic comfort foods

This year, more people are going back to basics and sticking to what they're familiar with. Yseult Caroff-Richeux, Partner & head of category trading, meal solutions and bakery, noted: "What we saw in the 2008 economic slowdown was more customers choosing premium ready-meals, or some of our Indian meals rather than going out to a restaurant or takeaway."

"What we're seeing this time is customers turning to our traditional cuisines more and sticking to firm favourites, being a little less adventurous and wanting to ensure their money is well spent. Our



No.1 Meal Deal remains popular because it offers great value at £12, and classic dishes such as chicken Kyiv or the beer battered fish are the most popular."

Comfort food rules. Nearly a third of our *Food & Drink Report* survey respondents (32%) told us they're regularly eating classics such as shepherd's pie and macaroni cheese.

Convenience is also king – sales of No.1 pies are up 34% and we're particularly finding comfort in potatoes. Sales of our potato side dishes are up 19%, with premium No.1 Triple Cooked Chips and No.1 Potato Dauphinoise the most



## Fermented goes mainstream

Increased interest in gut health brought fermented food and drinks to the fore – but this year fermented condiments, pickles, glazes and sauces are also having a moment, with sales up 14%.

Two flavours dominate – tang and umami. Total kimchi sales are up 44%, with Vadasz Super Beet Kimchi up 114% as sales peaked in health-focused January. Fruit-flavoured kombucha is gaining traction as a social drink and Waitrose now sells it in one litre bottles.

Our love of umami – that deep savoury flavour found in mushrooms, meat and fish – continues to grow. Sales of Cooks' Ingredients Teriyaki Sauce are up 94%, while Japanese Rice Vinegar rose by 13%. We added a host of moreish recipes to waitrose.com this summer – these include miso pork noodles, grilled corn with miso butter and nori salt and apple and miso toffee apple pudding. This Christmas, we're launching a Davidstow Cheddar with black garlic, which has a delicious umami, slightly smoky flavour.

**34%**  
UP ON LAST YEAR –  
WAITROSE ESSENTIAL  
BRITISH PORK  
SAUSAGES



sought after. We're also turning to more everyday frozen potato sides for contentment, driving sales of Essential French Fries, up 80%, and Essential Crinkle Cut Chips, up 34%.

This year, we deep-fried jam sandwiches thanks to Delia Smith's viral recipe; made posh toast inspired by Prue Leith's book *Bliss on Toast* and sought solace in comfort foods during a washout summer – sales of ready-made roasties, Yorkshire puddings and rice pudding were up 47%, 39% and 17% respectively.

We also rediscovered an old favourite – the humble banger. Essential British Pork Sausages sales are up 34% on last year, and we introduced Wagyu Sausages, made with premium British beef, in autumn.





## Protein everything

It was once the preserve of bodybuilders, but now making sure that you eat enough protein is common. Those aged 35 and under who took part in the *Food & Drink Report* survey rated being 'high in protein' the most important health quality in a food product, above aiding mood, sleep or skin or being low in fat, salt or sugar.

Overall, a third of those surveyed said they 'look for foods which are high in protein'. One in eight (12%) told us they have changed their diet over the past year to eat more protein and 41% of them are aged under 35.

Dr Joanne Lunn, Partner & nutritionist, said: "At Waitrose, we're passionate about every step of the food supply chain, from field to fork. The highest amount of protein comes from consuming chicken, lean beef, salmon and eggs. Consumers should be eating less animal protein but better quality, not only for health, but for the environment too. Working closely with farmers we know and trust and who share our values ensures we can bring the best quality to our customers' plates."

On social media, #protein is trending along with recipes such as feta fried eggs, protein bread and proffee (protein shake mixed with coffee), while searches for 'high protein lunch and dinners' (+34%) and 'protein snacks' (+45%) are up.

In store, high-protein drink and yogurts sales rose by 39%, as did organic feta (+20%). The trend is expanding from the dairy aisles too – Waitrose protein flapjacks are up 30% and filo pastry is also gaining traction, while Pieminister filo pastry pies are becoming the go-to for a healthier dinner option.

## Cottage cheese comeback

The one unlikely protein-packed ingredient that caught everyone by surprise this year is cottage cheese. Retro, great value and hugely versatile, influencers discovered this wallflower of the dairy cabinet can be transformed into all manner of dishes, sweet and savoury – cottage cheese pancakes, bread, cookies, ice cream (it's blended, sweetened and then frozen) and even whipped cottage cheese, a new take on last year's whipped feta craze. And even if no one had any intention of making any of these dishes in real life, the buzz caught on – sales are up 14%.

**39%**  
UP THIS YEAR FOR  
HIGH-PROTEIN  
DRINKS AND  
YOGURTS



## Izakaya bites (Japanese pub grub)

After a long day, Japanese workers often head to izakayas, which serve tasty bar snacks with a comfort-food twist (think yakitori, edamame and gyoza dumplings). Izakaya has grown 11% on social media this year and in September, Waitrose launched the new izakaya-inspired Japan Menyū range, featuring 26 convenient meals, centrepieces, sides and snacks. Caroline Mynard, Partner & new cuisines buyer said: "Our bestsellers are dishes people are most familiar with – prawn gyozas, prawn tempura and chicken katsu curry with rice."

Meanwhile, Asian fusion is trending on TikTok, with everything from Korean-style burgers and barbecue chicken to cheese toasts with shichimi togarashi (a blend of seaweed, sesame seeds, chilli flakes and dried orange peel). Sales of our Cooks' Ingredients Shichimi Togarashi are up by more than 7%.



## Cool beanz

First it was canned fish and Spam, now beans and pulses are the latest cupboard staple to get a foodie renaissance. Once dismissed as a bland and boring basic, they're now centre stage on every fashionable restaurant menu and are increasingly part of every savvy cook's kitchen arsenal.

In the past year, Waitrose customers have also cottoned on to their economy, versatility and great nutritional value (they're low in fat and high in protein). And how they can 'stretch' a hearty stew or simply stand on their own in a salad or stir fry. Butter beans are the nation's favourite (+63%), with chickpeas a close second (+51%).

This year, Bold Bean Co launched exclusively at Waitrose. The premium beans are slow cooked to bring out their subtle creamy taste, then seasoned and sold in glass jars.



## Booze-infused food

Alcohol has been used for thousands of years to flavour and preserve food, but this year it's all about surprising combinations. Ever thought to team vodka with pasta? A video recipe from supermodel Gigi Hadid (right) went viral and Heinz responded with a limited edition vodka pasta sauce exclusive to Waitrose. The product was an instant hit and became a bestseller within a week of going on sale.

Our No.1 Leckford washed-rind cheese uses Leckford Estate Brut sparkling wine to give the rind a nutty, slightly citrusy flavour. And new for Christmas, Waitrose has launched ale-infused Red Fox Welsh rarebit, plus old fashioned ham and old fashioned salmon – both finished with whisky, orange and bitters inspired by the classic cocktail. Last, but no means least, our smoked salmon infused with whisky was such a hit last Christmas that it's now sold all year round. Bottoms up!



## BYOC (bring your own cocktails, that is)

If you're wondering what drinks to take to a Christmas party, why not bring a canned cocktail or two? Of those surveyed, 40% have 'byoc-ed' for the first time in the past six months – rum and tequila-based cocktails have seen a combined growth of 84%, with Moth Margarita leading the pack.

One in five of respondents said they would take canned cocktails to a party instead of a bottle of wine.

Sarah Holland, Partner & canned cocktail buyer said: "Taking a mixture of different canned cocktails to a party

**40%**  
'BYOC-ED' FOR  
THE FIRST TIME  
IN THE PAST SIX  
MONTHS



means people can try ones they haven't tasted before, without the host having to spend a lot on bottles of liqueurs and spirits that aren't their favourites.

"But if you want to pull off the full mixologist-level experience, you need to buy good quality ones."

And guests are increasingly gifting their hosts more non-alcohol alternatives, too. Great quality olive oil in wonderfully ornate cans make a thoughtful present and in recent years, sales at Waitrose have risen by 52% between the months of November and December.



## The end of three square meals

From chocolate bars to cheese fridge raids, we're a nation of snackers. In our survey, 95% of respondents said they snack between meals, with 50% saying they snack two or three times per day or more.

For some, set meal times are a thing of the past – almost one-third (30%) of respondents said they sit down for two meals a day, substituting the third meal with snacks. For others, days are blurring into one long meal. One in 10 are only eating one meal a day and grazing the rest of the time, while 1% said they graze all day.

New hybrid work patterns may be partly to do with this – 43% of people who work from home admit they often fall into the habit of nipping into the kitchen and helping themselves to snacks throughout the day. We're also time poor – 9% often eat on the go while walking or commuting.

Giles Fisher, Partner & head of category, grocery and frozen, said: "Some people are

looking for small inexpensive indulgences such as crisps and biscuits, but others want healthier snacks like protein bars."

The most popular time of the day to snack is after 3pm (43%), followed by the 12-3pm slot, suggesting that people might be snacking instead of having a main lunchtime meal. Just 3% said they're partial to nighttime nibbles (from midnight to 6am). Savoury rules over sweet – the most popular snack is crisps (29%), followed by cakes and biscuits (22%) and chocolate (19%). A more virtuous 17% said they mostly snack on nuts or fruit and vegetables.

Those aged 18-24 are the group who snack the most frequently and social media is awash with people showing plates of artfully arranged snacks, kicking off one of this year's weirdest-sounding trends for #ratsnacks – the unashamed joy of eating unusual snack combos (that only you enjoy!), often made from raiding the kitchen cupboards.

**3PM**  
ONWARDS IS THE  
MOST POPULAR  
TIME OF THE  
DAY TO SNACK



**28%**  
RISE IN SALES OF 725G  
PACKS OF FROZEN  
GARDEN PEAS



## Chopped! Smashed!

Viral food is all about theatre, and adding cheffy swagger into prepping meals is the *only* way to go on social media this year. Cue chopped salads (a tasty way of using odds and ends in the fridge) and chopped sandwiches (a combo of meats, cheeses, vegetables and condiments cut into small pieces, then piled high onto bread).

If it isn't chopped, food is smashed. Take a glass, squish your food, then grill, fry or air fry it to crisp it up for added flavour. We've seen smashed broccoli, smashed Brussels, smashed roasties and smashed cucumber. Searches for #smashburgers had seven million views on TikTok, while #datebark – a layer of flattened Medjool dates drizzled with chocolate or caramel – had three million views on TikTok this year. At Waitrose, sales of dates are up by 67% this year.

In October, smashed peas on toast was declared the new avo on toast and sales of our 725g pack of frozen garden peas were up by 28% this autumn.



## Big spice energy

The sun may not have made much of an appearance this summer, but the British public's growing love for hot sauces led to a different kind of heatwave when their sales rose by 55%. This was partly fuelled by the viral YouTube chat show *Hot Ones*, where celebrities pit their wits against some of the world's hottest sauces.

Cholula Original Hot Sauce leads the pack (+55%), while Thai chilli sauce sriracha (+22%) rules TikTok, with more than 550 million views. Waitrose now stocks more than 20 different hot sauces, ranging from mild chipotle to a habanero sauce with a rating of 7,000+ SHU on the Scoville scale, which measures chilli heat.

Home cooks are also turning to spice for quick and easy flavour hits. In July, we launched a new range of 11 Cooks' Ingredients small jar seasonings (+17%) and we have just launched our new Cooks' Ingredients All Purpose Spice – a secret (and great-value) weapon to liven up any dish.

And make way for a new flavour profile – swalcy. Last year, we had 'swalty' (sweet and salty), now it's all about swalcy (sweet, salty and spicy). Manomasa Limited Edition Pineapple & Habanero Chilli Tortilla Chips flew off the shelves, while Cooks' Ingredients Gochujang Chilli Paste is becoming the go-to for elevating stir fries and sauces (+7%).

## And the ones going down...

### VEGETABLE CRISPS

Veggie crisps first made waves back in 2010 as a healthier snack alternative, but sales suggest we're tiring of them. This year has seen a slump in sales (-15%), with customers turning back to the simple joys of the humble potato crisp.

### READY-MADE JACKET POTATO WITH CHEESE ON TOP

This product was taken off sale as shoppers, more mindful of budgets, step away from buying anything they can easily create themselves. "Customers are looking for products that add value. If they don't know how to make it, or think we do it better, they'll buy it. But if it doesn't fall into either of those, they'll buy the raw ingredients and make it themselves," says Partner & innovations manager Lizzie Haywood.

### PINK FOOD

This summer, the world went pink. Even food got swept up in Barbie mania – pink pasta sauce, anyone? Sales of red food colouring rose 25% in July – only to fall back to normal levels the month after.

### SINGLE-USE PLASTIC COFFEE FILTERS

This year, Waitrose replaced plastic one-cup filter coffee with coffee bags made from plant-based materials, saving 8,000 tonnes of packaging and 4,000 tonnes of plastic per annum.

### LOW-FAT YOGURT, CHEESE AND MILK

As people become more focused on gut health and look to add more whole foods into their diets, the market for low-fat dairy alternatives is starting to decline.

Over the past year, one-third of the people surveyed said they have switched from eating a low-fat dairy product to a full-fat one. The most common is milk, followed by yogurt and cheese. The two motivations for changing are concerns about hidden sugars in more processed lower-fat foods and preferring the taste of full-fat products. Those aged 18-24 are most likely to have made the switch.

### WINE BOTTLES

This year, Waitrose has been giving the traditional wine bottle an eco upgrade. In January, we replaced the majority of small bottles with aluminium cans. In April, we became the first UK supermarket to sell bottles without the familiar plastic and foil sleeves around the necks, a trial which is taking place on the Loved & Found range. Both moves are estimated to save 320 tonnes and a half tonne of packaging per year respectively. In October, Waitrose signed an agreement to make full-sized glass bottles lighter (the average bottle weight will be under 420g by 2026) to reduce carbon emissions.

Boxed wine is becoming an acceptable alternative – even with more discerning wine buffs. This year, the race has been on to create more attractive packaging – a great example of this is Terre di Faiano Organic Rosso wine in a tube. Expect to see more boxed wines from now on.

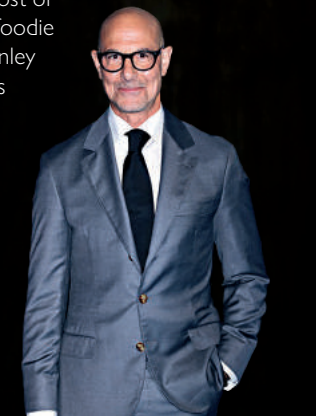


## Italian 2:0

Hands down our favourite international cuisine this year. Indeed, survey results showed that Italian food, whether cooked at home, ordered in a restaurant or as a takeaway, tops all others. Nearly one-third (30%) of those surveyed said they have eaten it more than any other international cuisine this year, with Chinese and Indian the joint second most popular, eaten the most by nearly one-fifth of those surveyed (19%).

"I'm seeing two sides to this trend," says Partner & innovation manager Lizzie Haywood. "People are eating more Italian at home – pasta and pizza – because they're really simple, delicious, affordable meals to make in the cost of living crisis. But then there's also the more foodie side – made popular by celebrity cooks Stanley Tucci (right) and Jamie Oliver, which focuses more on rustic, regional ingredients such as porchetta (central Italy) and orecchiette (Puglia) and trofie pastas (Liguria)."

Waitrose No.1 Mozzarella Di Bufala Campana DOP is up 24% and Parmigiano Reggiano 25%. At waitrose.com, searches for tiramisu recipes rose by 1,086% on last year and arancini recipes are up 26%.





# 2013

## Frankenbaking

In 2013, we all went crazy for the cronut – a croissant-doughnut hybrid – and since then, we've enjoyed a decade of delicious mashups, including the cruffin (croissant muffin), the brookie (brownie cookie) and the yumdough (yumyum doughnut). **Also this year:** Trendy restaurants started serving small plates and suddenly we had to share our food (whether we wanted to or not).



# 2014

## Flexitarianism

People cottoned onto the health advantages of eating a more plant-based diet, but many didn't want to go full-on vegetarian, so all the talk was about going 'flexi'. The term was added to the *Oxford English Dictionary* this year. **Also this year:** Sales of honey overtook jam for the first time. We also stir fried bagfuls of kale and drank lots of green tea.



# 2015

## Clean eating

Clean eating became the buzzword – a diet of vegetables, lean proteins, wholegrains and healthy fats, while limiting highly processed snacks and other packaged foods with added sugar and salt. Everyone started cooking with coconut oil and trying to make (notoriously tricky) cauliflower crust pizza. **Also this year:** Who can forget avocado mania? Sales rose 24%, with #avoontost trending on social media. Almond milk overtook soya milk.



# 2016

## Mindful drinking

Dry January hit the headlines, with 14,000 people downloading an app in a campaign backed by Public Health England. Since then, mindful drinking has gone from strength to strength – nine million Brits are estimated to have taken part in 2023, according to figures from Alcohol Change UK. **Also this year:** Brits tried seaweed, cactus water and cauliflower 'steaks'. We weren't healthy all the time, though – freakshakes, OTT milkshakes topped with cake, cookies and sweets, became a flash-in-the-pan craze.



## The trends of the

# DECADE

What trends defined the past 10 years and which ones were flashes in the pan? We take a look back over previous *Food & Drink Reports*



'It fascinates me how the past influences the present and what drives trends. How innovations like the cronut go viral and influence baking at home, how lockdown larder rummages unleashed people's creativity, and how plant-based, flexitarian and clean eating has led to people becoming more aware of the effect food has on their bodies'

**MARTYN LEE**

Partner & executive chef





### The return of carbs

Proving you can't put a good carb down, we put the kale aside and returned to artisan bread, quality pizza, fresh pasta and more 'exotic' carbs such as quinoa and bulgur wheat. **Also this year:** Turmeric trended as we made golden lattes (turmeric, ginger and cinnamon in almond milk). Rainbow-hued buddha bowls took over Instagram and everyone went for #brunch.

## 2018

### Rise of meat-free

The year that meat at the centre of the plate became an outdated concept for some. As people grew more climate and health aware, they turned to meat-free meals and Veganuary 2018 broke all records, with 168,542 people pledging to go vegan for the whole of January. **Also this year:** Plant-based milk alternatives such as oat, coconut and almond took supermarket shelves by storm – up 116%, 60% and 26% that year. We drank shots of apple cider vinegar after studies linked it to boosting the immune system. And aquafaba (the starchy liquid in canned chickpeas which whips up like egg whites) became the novelty staple for everything from vegan cocktails to dairy free mayo.

## 2019

### Vegan comfort food and gut health

This was the year vegan food went 'dirty', with cauliflower fried 'chicken', 'bleeding' plant-based burgers and cashew-milk mac 'n' cheese. Gut health also came to the fore and probiotics started popping up in everything from yogurts and shakes to cereal bars. Instagram started displaying sauerkraut in Kilner jars. **Also this year:** Sesame paste tahini trended as homemade houmous became a thing. And everyone started using their Nutribullets to make celery juice – a drink said to have all sorts of health benefits.



# 2020



## 2021

### Families and food fads

As we slowly came through the pandemic, we regrouped. People started to entertain friends and family again and it was all about smaller, more intimate dinner parties. We became very interested in which immune-boosting foods could fight off winter bugs. **Also this year:** The rise of FoodTok brought an explosion of new snack crazes – overnight oats, barbecued watermelon, cloud bread, Dalgona coffee, to name a few. And just when we thought we'd seen it all – along came potato milk.



### Lockdown dinners

The pandemic had a profound effect on cooking habits. Lockdowns meant that some of us could spend longer in the kitchen and thousands of Gen Z-ers got into cooking for the first time. We stockpiled flour, attempted sourdough and baked banana bread. We brewed posh coffee and grew herbs in window boxes. Millions of Britons confined to their homes looked forward to cocktail o'clock – who can forget Stanley Tucci's viral quarantinis? **Also this year:** Sales of pizza ovens and outdoor heaters were brisk as people took to alfresco entertaining.

## 2022

### Bye, bye oven

The cost of living crisis came with the added sting of soaring energy bills, so people started looking for economical alternatives. Step forward the air fryer, an appliance so quick and convenient it changed the way we cooked. Almost overnight, the question on everyone's lips was: 'But can you air fry it?' **Also this year:** Keeping the cost of the weekly food shop down got creative as people turned to fish heads, forgotten (and cheaper) cuts of meat and Spam.



## Drinks through the years

**2013 BAILEYS CHOCOLAT LUXE**  
Baileys was given an even more indulgent twist and cream liqueurs were changed forever.

**2014 ESPRESSO MARTINI**  
Sales of coffee liqueur were up – and we were (quite literally) buzzing.

**2015 GIN**  
The year of a gin renaissance, with sales up 300%.

**2016 ROSÉ**  
The craze for Whispering Angel, plus a hot summer got us quaffing the quintessential warm weather tippie.

**2017 CRAFT BEER**  
Small breweries boomed as flavours got ever more creative.

**2018 FROSÉ**  
The pretty pink drink of frozen rosé made for perfect Instagram fodder.

**2019 FLAVOURED GINS AND POSH MIXERS**  
From rhubarb to blood orange, we couldn't get enough of flavoured gin. Posh mixers such as Fever-Tree and Double Dutch followed suit.

**2020 ENGLISH WINE**  
A great growing season helped cement our reputation for still and sparkling wines that are world-class.

**2021 APÉRITIFS**  
Sales of Aperol were up 148%, and Martini extra dry vermouth up 33%

**2022 TEQUILA**  
The drink of the year lost its student connotations, with sales doubling in a year.





# What we've been DRINKING in 2023

**T**he rise of no and low, less heavy reds, ice in wine, cocktails in cans – this year we've been ripping up the alcohol rulebook and discovering a new freedom in choosing what we want to drink and when," says Master of Wine Pierpaolo Petrassi, Partner and head of trading for beers, wines, spirits & soft drinks.

"People are becoming more adventurous and looking for new tastes and natural wines. They're also prepared to spend more on high-quality tipples as an occasional indulgence, with drinks such as limited-edition whiskies flying off the shelves. Drinks have been turned on their head too and have swapped places. "Cognacs and whisky are now being used in cocktails. And cocktail spirits such as rum and tequila are now being drunk on their own, with the rise of barrel-aged tequilas and rums," says Pierpaolo.

Then there's the rise of midweek options. "We're seeing more people treating themselves to a little something during the week," he adds. The act of treating yourself to something small and inexpensive is typically called the lipstick effect. We're seeing it with the rise of 20ml minis of Prosecco, up 6% (the 'fizz effect'), and canned cocktails, up 5%.

But perhaps the biggest change this year has been that Britons no longer view an adult drink as one that has to contain alcohol. Across Europe, there's no stigma attached to no- or low-alcohol drinks – it's thought to be just as grown up, just as interesting, just as appealing as a drink with alcohol in it. "As people become more health-conscious, we're coming round to this idea – and it's opening up an exciting new world in low- or alcohol-free spirits, cocktails and beer," says Pierpaolo.



**PIERPAOLO PETRASSI**

Partner & Master of Wine

## Highballs

As more people move to moderate their alcohol intake, we're seeing a trend for old-school highball drinks such as whisky and soda, Jack Daniel's and Coke, or Cuba libre (rum and Coke). Sales of Waitrose club soda are up 17%, while 150ml Coca-Cola cans used for mixers are up 8%.

## Hugo spritz

Sales of St Germain, the old-fashioned elderflower liqueur, are up more than 9% this year. Its ornate Art Deco-style bottle not only looks great, but it played the star role in this summer's viral cocktail, Hugo spritz (mixed with white wine and soda).



## Guinness

The brand has shrugged off its dated reputation to become the UK's best-selling draft beer, accounting for one in every nine pints pulled in a pub. At Waitrose, sales of Guinness (alcoholic) are up 5% but it's Guinness 0.0 that has seen an astounding 77% increase – partly thanks to a brand refresh, a host of new converts and Guinness Nitrosurge – a gadget that replicates a pub-poured pint at home (tipped to be one of this Christmas's must-buy gifts). Launched in July, it's already proving to be a hit.

## How pink is your drink?

Even before Barbiemania, this trend was on the rise, with blush-hued Lillet Rosé (apéritif with tonic) and pretty Paloma cocktails (tequila, pink grapefruit and lime juice) topping the bill. Searches for our La Paloma cocktail recipe are up 131% and sales are strong of pink mixers, including Fever-Tree Pink Grapefruit Soda and London Essence Pomelo & Pink Peppercorn Tonic Water.



## Natural wines

They're cropping up on the menus of hip wine bars, but what exactly are they? Natural wine has no formal definition. For some, it means low intervention during the winemaking process, such as no filtration, which creates hazy wines. For others, it means biodynamic practices. It can also mean wines made with no added sulphites (which preserve wine). It could be all of the above. Whatever the definition used, they're becoming more popular. Sales of biodynamic wine The Hedonist Shiraz are up 7%, and sales of our organic wines (many of which are biodynamic, too) are up 182%.

## Japanese whisky

A relative newcomer to UK drinks cabinets, in the past 20 years this has been nipping at Scotland's heels in terms of desirability – and our sales (+11%) prove this point. Hibiki Japanese Harmony, produced by Japan whisky producer Suntory, is a collectable whisky which has won numerous awards for its complex yet delicate flavour. "In October, we launched Hibiki Japanese Harmony 100th Anniversary whisky and it sold out in under a day," says Partner & spirits buyer John Vine.



## Vermouth

The punchy botanical taste of negroni may not be to everyone's liking, but increasingly, converts to this bitter drink are outweighing naysayers. With this popularity comes a growing interest in the world of apéritifs and vermouths. Vermouth sales are up 5%, while sales of Lillet Rosé Vermouth apéritifs are up 176%, and Cocchi Extra Dry is up 78%.

SALES OF LILLET ROSÉ VERMOUTH APÉRITIFS ARE UP

**176%**



### Continuing rise of no and low

Sales of no- or low-alcohol beer, cider, wines and spirits are up 23%. Demand is growing at such a rate that Waitrose has introduced dedicated areas in 253 shops across the UK to make it easier for customers to find our range of more than 70 low- and alcohol-free drinks.

“In recent years, there has been a rise in premium products which taste great next to their alcoholic counterparts, such as Heineken 0%, Warner’s 0% Gin and Guinness 0.0,” says Pierpaolo.

While it was a trend spearheaded by a younger generation, it has become more mainstream – one in 20 survey respondents (5%) told us they had their first non-alcoholic drink this year and nearly half of UK adults (47%)\* are switching between alcohol and low- and alcohol-free drinks on the same occasion in order to moderate their drinking.

Will it be a more sober Christmas and New Year this year? Around one in seven (15%) said they intend to drink less alcohol, with health being the main driver, and 25% will do it to save money (only 6% are trying to avoid a hangover).



# 253

WAITROSE SHOPS WITH DEDICATED AREAS FOR LOW- AND ALCOHOL-FREE DRINKS

### Orange wine

Waitrose orange wines are gaining a loyal following, with sales up 85%. For those unfamiliar with the tippie, orange wine is a type of white wine made by keeping the grape skins (or a proportion) attached during production – just like red and rosé winemaking. This creates a pretty, orange-hued drink.

Making white wine with the skins, gives a bolder, more robust, almost sour wine, with tannin (not found in white wines). They often deliver notes of sourdough, hay, orange blossom and apricot. It’s a standout on any wine menu – and photogenic, too. The #orangewine hashtag has more than 3.5 million views on TikTok, while searches for orange wine are up 20% at waitrose.com. Chefs are also loving this as an accompaniment to big-flavour curries and Moroccan-inspired dishes.



### Chilled red

It was always an unspoken rule that white and rosé were for summer and red (kept at room temperature) for winter, but these perceptions have gone out of the window in recent years. “We’re no longer worried about sticking to seasonality when it comes to our choice of wine – drink what you like, when you like, how you like,” says Jamie Matthewson, Partner & wine buying manager for Waitrose.

In our survey, 11% of respondents told us they have drunk chilled red this year and 6% have gone one step further, saying that they even like to put ice in their red wine! “One of our red wines that tastes great when slightly chilled is Santa Tresa Frappato, and sales are up 86%,” says Jamie.

### Martini mash-ups

The Madonna of the cocktail world, martini deserves its own special shout-out this year for its never-ending capacity for reinvention. Thanks to TikTok, ingredients that make a classic dirty martini (gin, vermouth, olive brine and a garnish) are being swapped for funkier substitutions, sweet or savoury. While the classic espresso martini reigns supreme with six million views, this year it’s all about passion fruit martinis (one million views). Earlier this year, a chicken soup martini attracted 600,000 views, while a recipe for dirty martini pasta got everyone talking.

Eight percent of survey respondents told us they have made or bought a martini in the past year and sales of canned Moth Espresso Martini are up 17%. Waitrose has just launched ready-to-drink bottles of No.1 Espresso Martini and Passion Fruit Martini.



# What HEALTHY means now



In recent years, the concept of health has changed. “People used to view it as restrictive – that you had to cut things out, whereas it is now much more about looking at what you can add to your diet,” says Dr Joanne Lunn, Partner & Waitrose nutritionist.

The desire to lead a healthy life now means different things to different people depending on their lifestyle and what stage of life they’re at. Consumers want more personal upgrades, food and drink that promises to make them

look and feel better, sleep better, digest food better, feel less stressed and concentrate more.

Step forward functional fizz, menopause menus, plant-based fitness, immune-boosting wellness shots, sleep teas and more foods with gut-friendly promises. “People are looking to be healthy and eat less animal fat and more plant-based food.

But they’re also time poor, searching for convenience and are often confused by conflicting evidence

flying round the internet – so these products offering specific proven benefits are key,” says Joanne.

Monday is the nation’s healthiest day each week – 26% of our survey respondents told us that this is when they’re most likely to eat healthily, with Thursday and Friday the days where the halo slips.

**26%**  
OF PEOPLE ARE MOST LIKELY TO EAT HEALTHILY ON A MONDAY

### Hot shots

Since the pandemic, people have been looking at ways to boost their immune system with supplements or through their diet – 29% of respondents said they consider this when choosing which foods to buy.

What started as a trend for downing a daily nip of apple cider vinegar has morphed into one for wellness shots – little bottles of plant-based, gut-friendly vitamin goodness. This year, Waitrose launched 5x Turmeric Shots – a week’s worth of shots in one bottle.

Cold-pressed juice is also in the spotlight. The process used to press the fruit and vegetables into juice leaves it with a high concentration of antioxidants, vitamins, and minerals which is said to boost immunity, digestion and enhance skin health.

Sales of cold pressed juice are up 70% and we have added two new cold-pressed juice ranges to chiller shelves – Daily Dose (using wonky fruit and vegetables) and lower-sugar Mockingbird Raw Smoothies.

SALES OF COLD PRESSED JUICES ARE UP **70%**







## Functional fizz

Want to fight off a bug? Feel less bloated? There's a sparkling drink for that. This year, Waitrose launched a range of new drinks with ingredients that will boost your health. The plant-based Humble Warrior Natural Immunity drink – with added acerola cherry for 100% of your daily recommended vitamin C allowance – was introduced to 25 stores in May. They've proved so popular that we expanded the range to a further 212 shops last month.

Sales of Fix 8 kombucha drinks, introduced last October, have risen by more than 1,000%. Finally, Waitrose's Happy Inside drink, packed with immune-boosting prebiotics, is seeing an uptick as winter takes hold – the pomegranate, lime & mint has risen by 207% and the lemon, yuzu & ginger more than 100%.



## Gut health grows up

Gut health went mainstream this year. The viral 30 plants-a-week challenge made us think about eating more fruit and veg. And the hashtag #guthealth trended on TikTok – or should we say GutTok? – and with it an explosion of food hacks, some healthy, some more dubious.

Despite the fads, consumer knowledge of the importance of gut health has risen. Nearly a third (32%) of people in our survey said that when shopping for food and drink they now think about how it will impact their gut. People searching for 'food good for gut health' is up 84%.

What shoppers are buying is changing too – we have observed shoppers moving away from stocking up on probiotic shots and instead making conscious attempts to include more natural plants and wholegrains into their diets. Sales of fresh veg were up 42% for the first six months of the year. Uber Eats and Deliveroo report that fruit and vegetables including strawberries, grapes and bananas are among their most ordered foods.

Sales of kefir have risen 19%, along with 'teas with benefits' to aid digestion (from peppermint to probiotics), up 8.5%. And fermented drinks are not all about kombucha! Earlier this year, Waitrose exclusively introduced Dragonfly Pu'er & Lemon Tea. Pu'er is a traditional Chinese tea, lightly fermented and with the gut health benefits of kombucha but without the sugar. This product has proved so popular that a new variety Dragonfly Pu'er Chai with warming spices has been introduced for the colder months.

Even some food you wouldn't normally associate as gut-friendly got a look-in this year – Gouda, cottage cheese and the soft cheese quark are all great for the digestive system and their sales have risen by 5%, 14% and 16% respectively.

SALES OF FRESH VEG ARE UP

42%

## Eating for energy

In our (often sleep-deprived) 24/7 world, keeping up our energy levels is increasingly becoming a priority for many people. Indeed, 28% of our survey respondents told us they have cut out or reduced their caffeine intake over the past year.

People are looking for healthier solutions to beat their 3pm slump and this can be seen in strong sales of our energy-boosting Vitamin B tablets and effervescents, up 31%.



MAGNESIUM SUPPLEMENTS ARE UP

33%

## Menopause menus

Women's wellness has started getting the attention it deserves, with celebrities such as Davina McCall (below) and Mariella Frostrup helping to break down the stigma of menopause. Sales of women's wellbeing teas are up 46%, led by Twinings Superblends Menopause Tea, and Waitrose has brought out a range of Health & Her supplements for menopause and perimenopause.

There's also been a growing interest in how the right diet can help alleviate menopause symptoms. Searches for 'healthy menopause diet' are up nearly a quarter (+23%),

'menopause recipes' rose by 27% and 'foods to avoid menopause belly fat' were up 108%. One in 14 (7%) of respondents told us they now think about how foods they buy will support their symptoms.

Specific menopause ingredients have piqued the most curiosity, with searches for 'soy', 'pumpkin seeds' and 'spirulina' topping the charts, thanks to studies linking them to the possibility of alleviating symptoms (+600%, +50% and +50% respectively). This year, sales of tofu have also risen by 6%.

WOMEN'S WELLBEING TEAS ARE UP

46%



## Skin food

A good diet will feed and nourish your skin and hair. In our survey, one in six (16%) said when food shopping they think about the impact their choices will have on their skin. People also look to give their complexions some extra help – skin boosting tea infusion Twinings Glow is up 35%. Waitrose has also recently added a range of Borough Bone Broths. Broth is high in unprocessed collagen, which helps to promote healthy joints and improve skin health and elasticity.

## Sleep tea

For optimal health, all roads lead to sleep, with experts calling it 'the ultimate health hack'. Which is why many more people are making sure their kip is the best it can be. Almost one in six (16%) of our survey respondents told us they think about which foods will help them sleep better. Sleep and relaxation teas now lead our health tea offerings (choose from 15 different types and flavours) with sales up 19%.

On TikTok, sleep mocktails are trending. Made with sour cherry juice, sparkling water and a tablespoon of magnesium powder, the theory is that the cherry juice naturally contains sleep-boosting tryptophan and melatonin, while the magnesium evokes feelings of relaxation.



## Magnesium

Every so often a 'wonder supplement' catches the public's attention and this year it's the turn of magnesium.

Magnesium is an important nutrient which plays a central role in almost every bodily process. Some studies have linked it to helping calm the mind, improve cognitive function and increase attention and focus. It may also play a role in improving the quality of your sleep.

Waitrose magnesium supplements are up 33% and the buzz around magnesium means that it's now starting to appear in drinks too – searches for magnesium water have risen 1067% this year.

In May, we introduced OHMG Sparkling Magnesium Water to stores – with a strapline of 'relaxation in a can' – and early figures show that it's on track to become a bestseller.





The future of

# VEGAN



FILLED VEGAN PASTA SALES UP

# 31%

AIDED BY THE LAUNCH OF PLANTS BY DELICIOUSLY ELLA

New figures show that we're eating less meat. Data from the Department for Environment, Food & Rural Affairs showed that this year, meat consumption has fallen to its lowest level since records began in the 70s. People are turning away from red meats such as beef, pork and lamb faster than others, while the cost of living crisis is leading many to choose cheaper vegetarian options.

It would be logical, therefore, to think that vegan options – especially meat mimics such as fake steak and chickenless chicken – would be on the rise. Instead, stories in the press have declared that the vegan bubble has burst.

Catherine Shacklock, Partner & chilled vegan and vegetarian buyer, believes the headline writers have been too hasty. "During Covid, we saw strong sales of plant-based products when everyone had time to experiment, then last year figures dipped when the market returned to normal," she says. "But 2023 has seen a growth again. So the vegan bubble hasn't burst – it's just maturing."

The negative news around ultra-processed food has made some people turn away from some mock meats and fish, prompting manufacturers to ditch lines that aren't selling and to double down on those that are. Cost has also been a factor – some vegan mimics can be more expensive than the real thing – which has deterred non-vegan shoppers who just want to eat less meat and a few more plants.

The *Food & Drink Report* survey found that 70% of people are still meat eaters, while those who aren't call themselves 'flexitarian' (15%), 'vegetarian' (7%) or 'vegan' (2%). But many meat eaters are trying to cut down. In the past year, 23% said they have eaten less red meat, while nearly a quarter (24%) said the main reason for changing their diet is health, with 14% altering their habits to be kinder to animals.

Shoppers are also looking for convenience – searches for 'vegan airfryer recipes', for example, are up 175% at waitrose.com.

"This year, we're noticing a shift towards more natural plant-based ranges," says Catherine. Filled vegan pasta sales are up 31%, helped by the launch of Plants by Deliciously Ella, while sales of Clive's products, another vegan range, have risen 32%.

Plant-based protein tofu has been a surprise hero in many kitchens this year, with The Tofoo Co's Naked Tofu up 10%.

Plain, flavoured or marinated, it seems people are becoming more confident about using tofu.

While the cost of living crisis has meant shoppers are turning their backs on more adventurous flavours and sticking to what they love, there is still a place for vegan innovation and exciting new flavours. As well as stocking vegan cheesemonger La Fauxmagerie, last month Waitrose added Palace Culture to shelves, a nut-based 'cheeze' with an authentically cheesy texture, but without the dairy.





**1 AI INGENUITY**  
This was the year when Artificial Intelligence (AI) hit the headlines, thanks to ask-it-anything platform ChatGPT reaching 100 million users in February, just two months after launch. Waitrose has been using AI to follow food trends for two years now.

The AI explosion has also seen a rise in useful tools to help us cook via apps such as ChefGPT, FoodAI and Dishgen, which create recipe recommendations, and 6% of survey respondents said they have used ChatGPT for recipe inspiration in the past 12 months.

But people are fast discovering that AI can do more than offer midweek dinner inspiration – it can also help create incredibly imaginative dishes.

That's perfect fodder for tiktokers, who have been putting it through its paces with tasks such as 'make me a Michelin-star kebab' and 'invent a completely original mac and cheese'. Whatever feast your heart (or imagination) desires, AI will dream up a recipe in seconds. It's only a matter of time before this tech becomes commonplace in kitchens and soon there'll be no limits to where your imagination can go.



**2 FOOD FROM THIN AIR**  
As biotechnology moves forward, a number of startups are looking beyond plant and animal cells – and one has even found a way to make protein from air.

Solein, produced by Finnish startup Solar Foods, is made from microbes, water and carbon dioxide. It's neutral in taste and comes in powder form, so is ideal for adding to all kinds of dishes, from bread to ice cream. There are hoops to jump through before Solein will be available on British supermarket shelves, but it has got the regulatory nod in Singapore and is already on menus there.



**3 FIORI DI SICILIA**  
Watch for flavour notes of this fragrant citrus-packed, vanilla-esque extract working its way into dishes soon. Translated from Italian as 'flowers of Sicily', fiori is often used as a substitute to vanilla to add more depth of flavour to cakes and desserts such as panettone or panna cotta. As with any extract or oil, you can also wear it as a perfume!

**4 NEPALESE AND PAKISTANI**  
These cuisines are coming up through the street food incubator. Nepalese, slow-cooked meats on the bone; spicy vegetable tarkari curries; and momos, steamed dumplings filled with meat or veggies. And Pakistani – meaty biryanis; black lentil kali dal; and chicken karahi, a tomato and ginger masala curry. As with any cuisine, it's only a matter of time before it gets a modern twist from hip eateries. Enter cheesy naan melts from Khaao Karachi in Camden Lock, and jimbu focaccia and gundruk butter from London restaurant The Gurkhas.



# TOMORROW'S TRENDS

Experts predict the buzzworthy ingredients, innovations, salt and dishes for 2025 and beyond



'The future of food definitely involves AI, aiding us in creating recipes, predicting trends and personalising meals, although there will always be a human needed in the loop to create the best-quality

and best-tasting food. There's so much to be excited about, from biotechnology to Nepalese momos, innovation and knowledge about gut health advancing quickly and more delicious umami ingredients such as soybean paste doenjang'

**LIZZIE HAYWOOD**

Partner & innovations manager

**5 MORE LOW-FAT-SALT-SUGAR INNOVATION**  
Government rules around high fat, salt and sugar (HFSS) have helped accelerate innovations, particularly with well-known brands. These range from new technologies to healthier, more natural replacements including real fruit purées, nuts, seeds and wholegrains. It's something customers are looking for – 47% told us they factor in whether it is high fat, salt or sugar before buying. Expect more clever non-HFSS versions of our favourite treats to come.

**6 DOENJANG**  
If you love miso, you'll love doenjang. This Korean fermented soybean paste has been described as soy sauce's more assertive cousin – a thick sour-salty-umami paste that can be used in stir fries, sauces, over vegetables or in salad dressings. It will also take caramel to another level.



Photographs: Stock Food

**7 PERSONALISED NUTRITION**  
Knowing how healthy certain foods are for your genetic make-up was something you used to be only able to do with tests overseen by a nutritionist. But this year the Zoe app – billed as the 'most scientific diet plan ever' – shook up the industry, opening up bespoke nutrition to the masses. Personalised data may be still in its infancy, but all signs are that it is set to gather pace as scientists learn more about DNA, the gut and lifestyle. You may soon find when asking dinner guests for their dietary requirements that you have more than you bargained for!

**8 PSYCHOBIOLOGICS**  
A healthy gut is the foundation to everything – from improving our digestion to strengthening our immunity and preventing allergies. But now an increasing number of studies are discovering a link between our gut microbiome and our mood and mental health. Feeding your gut foods it likes will help you feel healthier and happier – those rich in omega 3 fatty acids (fish and flaxseeds), polyphenols (berries, olives and soy beans), fibre (lentils, avocados and broccoli) and fermented foods (kimchi, yogurt and miso). In our survey, 25% told us that they factored

in foods that would improve their mood into the weekly shop. Scientists have recently pinpointed certain gut microbes they call 'psychobiotics' – specific probiotics (beneficial live bacteria) and prebiotics (substances promoting beneficial bacterial growth) that impact cognitive function and mental health. We're already selling Bio-Kult Mind gut supplement capsules – expect to see this area of gut health grow.







WAITROSE  
& PARTNERS