



WHAT'S
HOT
2023
CULINARY FORECAST

2023 WHAT'S HOT CULINARY FORECAST



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The **National Restaurant Association**, in partnership with the **American Culinary Federation (ACF)** and **Technomic**, conducted the 17th annual What's Hot survey targeted to thought leaders in the culinary field. More than 500 professionals from the ACF and chefs associated with Association programs weighed in on what they see as the leading menu trends for the coming year.

Drawing on their culinary expertise, the Association forecast top menu trends from a list of 110 items in 11 categories, which were curated by the Association and Technomic's Menu Research & Insights Division. Categories include dayparts, menu sections, alcohol and non-alcohol beverages, flavorings, global influences, and industry macro-trends.

This report presents the top 10 Hot Trends overall, the top Hot Trend by category, and the top 3 Hot Trends from each category. Also included: Ones to watch—emerging trends—and trends that are cooling down.



HUNGRY

FOR THE RESTAURANT EXPERIENCE



What tops the 2023 What's Hot list? Restaurant experiences, local dining and community. Despite the dominance of off-premises restaurant use, pent-up demand for restaurant experiences—socialization, celebration, culinary exploration—is strong.

Inflation, however, is changing how customers spend their restaurant dollars in a greater search for value, and operators will continue to promote meal deals, family bundles and culinary kits that meet at the intersection of craving and budgetary caution.

And although consumers feel inflationary pressures, the cost of groceries is currently outpacing higher menu prices (up 13.0% vs. 8.5% year-over-year in October). Even in inflationary times, consumers want to use restaurants. The challenge for operators is to stay interesting and relevant to attract consumers who are looking to experience food they can't replicate at home.

Restaurateurs always work to keep menu price increases in acceptable territory, but it's been hard going over the last three years. Operators know that some of the recent efforts they've made to balance cost increases, including streamlining menus and innovating dishes with less costly ingredients, are just practical, and these efforts are reflected in the rankings.

Also, responding to changing customer demand: recognizing that dayparts are blurring. Remote work has profoundly disrupted the concept of set meal periods and the sheer convenience of accessing any kind of meal or snack 24/7 through delivery, curbside pickup, counter pickup and drive-thru has had an impact on foodservice. The proliferation of hand-held items, bowls, sandwiches, wraps and new sandwich carriers set up more menu items and meal solutions to go.

Comfort foods and healthier items continue to trend in a classic face-off; consumers are loathe to part with either option.

HOT HOT HOT



 GLOBALLY INSPIRED SALADS

All restaurant dining is local, and according to the survey, more than 70% of respondents agree that customers want to gather on-premises—as hungry for connection as sustenance.

More than 70% also say the chicken sandwich wars are still in play; in the lunch category, they grab two of the top three spots. During the Institute of Food Technologists annual IFT FIRST event in '22, alternative sweeteners flooded the expo floor, and that trend is reflected in the Dessert category. How menus fit with environment, sustainability, and governance (ESG) is a key consideration for operators who want to build relevance with customers. ESG extends to packaging, sustainable farming and finding value in—and using up—all foods. And while nutrition and sustainability continue to influence our food system, it's flavor that sells food and you'll find myriad instances throughout these lists where globally inspired seasonings and dishes drew votes.

10 HOT TRENDS FOR 2023

1. Experiences/local culture and community
2. Fried chicken sandwiches & Chicken sandwiches 3.0 (i.e., spicy and sweet-heat fusion flavors on chicken, etc.)
3. Charcuterie boards
4. Comfort fare
5. Flatbread sandwiches/healthier wraps
6. Menu streamlining
7. Sriracha variations
8. Globally inspired salads
9. Zero waste/Sustainability/Upcycled foods
10. Southeast Asian (Vietnamese, Singaporean, Philippine, etc.)

TOP HOT

TREND BY CATEGORY

BREAKFAST: Value meals

LUNCH: Chicken sandwiches 3.0
(spicy and sweet-heat fusion flavors, etc.)

DINNER: Less-expensive meat cuts (chicken thighs, beef chuck, pork shoulder, etc.)

DESSERTS: Alternative sweeteners (maple sugar, coconut sugar, etc.)

SNACKS: Elevated bar snacks

APPETIZERS & SIDES: Charcuterie boards

BEVERAGE NON-ALCOHOL: Oat, nut or seed milks

BEVERAGE ALCOHOL: Spritzes

CONDIMENTS, SAUCES, SPICES & SEASONINGS: Sriracha variations

GLOBAL TRENDS: Southeast Asian
(Vietnamese, Singaporean, Philippine, etc.)



➤ ALTERNATIVE MILKS



➤ SPRITZES



➤ LESS-EXPENSIVE MEAT CUTS

BIG PICTURE



Off-premises dominates the industry, but consumers want to connect over shared meals more than ever. Offering comfort foods, many with a global or signature twist, and menu streamlining (to pare offerings to best sellers with good ROI) continue to be smart business practices.

TOP 3 MACRO TRENDS

1. Experiences/local culture and community
2. Comfort fare
3. Menu streamlining



COMFORT FARE



EXPERIENCES/LOCAL CULTURE AND COMMUNITY



MENU STREAMLINING

Ones to Watch

These top “emerging” trends bear scrutiny as they could portend future hot trends. Global influences play a strong role in many of these potential up-and-comers. Diners, especially Gen Zs who are starting into their earning years, like to sample—and post about—breakthrough foods and flavors.

1. **Globally inspired sandwiches** (*Chinese Rou Jia Mo or jianbing, Argentine choripan, etc.*)
2. **New sandwich carriers** (*paratha, roti, pastry buns, crepes, etc.*)
3. **Amazake** (*Japanese drink made from fermented rice*)
4. **Alfajor** (*sweet of almond paste, nuts, breadcrumbs & honey*)
5. **Balkan** (*Croatian, Bulgarian, Turkish, etc.*)
6. **Raki** (*Turkish alcohol made of twice-distilled grapes & anise*)
7. **Automation technology** (*monitoring volume, temperature & time*)
8. **Hawaiian haupia** (*coconut pudding*)
9. **Huacatay** (*Peruvian black mint sauce*)
10. **Elevated breakfast bowls** (*breakfast rice bowls, breakfast pasta bowls, etc.*)



ARGENTINE CHORIPAN



PICKLE PIZZA

UP

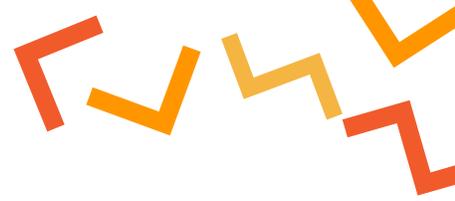
DOWN

Cooling

Cooling are items that might safely be considered fads vs. trends, although word has, it pickle pizza is delicious.

1. **Pickle pizza**
2. **Breakfast salads**
3. **Fried lasagna**
4. **Balsamic cocktails**
5. **Fruit-flavored coffee** (*e.g., banana, etc.*)
6. **Pickled French fries**
7. **Ranch water**
8. **Upscale pigs-in-a-blanket**
9. **Name-brand snacks** (*i.e., retail brands incorporated into restaurant recipes*)
10. **Crudité platters**

ALL DAY DINING



Remote work is having an exponential impact on when and what consumers order from restaurants, both on- and off-premises. Traditional meal periods are blurring thanks to the combination of access to menu options all hours of the day and consumers with very flexible schedules. Every daypart, from breakfast to snacks, presents opportunity to entice customers.

Topping daypart lists are breakfast value meals, more flavorful chicken sandwiches for lunch, and at dinner, the excellent results when a good cook gets a hold of a flavorful, but less-expensive cut of meat. Shareable charcuterie and elevated bar snacks are satisfying consumers' munchies while enhancing the communal, on-premises dining experience.

Top 3 Breakfast

- 1. Value meals**
- 2. Unique handhelds** (*French toast sticks, chicken & waffle sandwiches, etc.*)
- 3. Veggie-forward breakfasts** (*vegan tofu scramble, breakfast relleño, etc.*)

Top 3 Lunch

- 1. Chicken sandwiches 3.0** (*spicy and sweet-heat fusion flavors on chicken, etc.*)
- 2. Fried chicken sandwiches**
- 3. Flatbread sandwiches/healthier wraps**





ALL DAY DINING

Continued

Top 3 Dinner

1. Less-expensive meat cuts (*chicken thighs, beef chuck, pork shoulder, etc.*)
2. Cauliflower carb alternatives (*rice, pizza crust, etc.*)
3. Meal kits/Family meals

Top 3 Appetizers & Sides

1. Charcuterie boards
2. Cauliflower
3. Elote



MEAL KITS/FAMILY MEALS



CHARCUTERIE BOARDS



CAULIFLOWER



▶ REVAMPED CLASSICS



ALL DAY DINING

Continued

Top 3 Snacks

1. Elevated bar snacks
2. Bolder loaded fries (*ghost pepper fries, hot honey fries, etc.*)
3. Reduced-sugar snacks

Top 3 Desserts

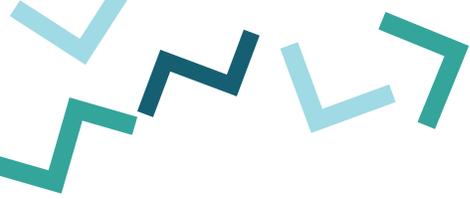
1. Alternative sweeteners (*maple sugar, coconut sugar, etc.*)
2. Revamped classics (*moon pies, housemade oatmeal cream pies, deconstructed s'mores, etc.*)
3. CBD desserts



▶ ALTERNATIVE SWEETENERS



▶ ELEVATED BAR SNACKS



LITTLE CHANGE IN LIBATIONS

The plant-based trend extends to milks, with nut, oat, and seed milks cropping up on menus with more regularity. The reasons? Many like the taste and texture, as well as the reduced amounts of calories, fat and carbs; they're a good dairy alternative for vegans and lactose-free.

Cold brew coffees as well as non-alcohol seltzers and sparkling waters are also popular with consumers, especially ones who desire refreshing, health-halo drink options. Diners are also experimenting with more indulgent, alcohol options, including spicy cocktails, espresso martinis, and spritzers that taste delicious and photograph well.

Top 3 Beverage non-alcohol

- 1. Oat, nut or seed milks
- 2. Cold brew innovations (*flavored cold brews, cold brew with toppings, etc.*)
- 3. Non-alcohol seltzers/sparkling water

Top 3 Beverage alcohol

- 1. Spritzes
- 2. Espresso martinis
- 3. Spicy cocktails (*ghost pepper cocktails, etc.*)



COLD BREW INNOVATIONS

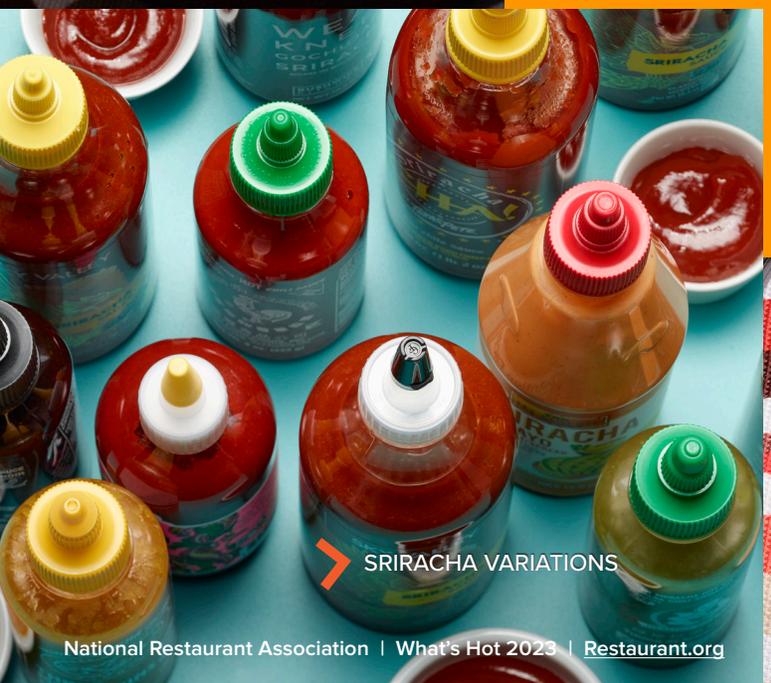


ESPRESSO MARTINIS

FLAVOR TOURISM



> SOUTHEAST ASIAN



> SRIRACHA VARIATIONS

Consumers will always want foods that reflect the familiar flavors they know and love, but they continue to expand their palates with unique global fare.

With so many eyes on screens, social media plays a huge role in spreading the word about the latest flavor sensations. Consumers crave foods that challenge their taste buds at a more sophisticated level than ever before, including new levels of hot, spicy, sweet, and savory. Whether it's an Argentine choripan sandwich, or Jianbing, a Chinese breakfast crepe, consumers are ready to add stamps to their culinary passports.

Top 3 Condiments, Sauces, Spices & Seasonings

1. Sriracha variations
2. Ganjang (*Korean soy sauce*)
3. Guajillo chili sauce

Top 3 Global Trends

1. Southeast Asian (*Vietnamese, Singaporean, Philippine, etc.*)
2. Caribbean (*Puerto Rican, Cuban, Dominican, etc.*)
3. South American (*Argentinian, Brazilian, Chilean, etc.*)

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Methodology

The National Restaurant Association partnered with the American Culinary Federation and Technomic to conduct its annual What's Hot survey. Targeted to thought leaders in the culinary field, more than 500 professional chefs from the ACF and chefs participating in Association programs weighed in to tell us what they see as the leading food and menu trends for 2023.

They were presented with a list of 110 food items and culinary concepts compiled by Association experts and Technomic's Menu Research & Insights Division, and were asked to rate each item as Hot, Not Hot and Emerging.

The top results are here.

For more information, contact the National Restaurant Association askus@restaurant.org

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