

Tate & Lyle and CP Kelco are excited to bring you the first **Mouthfeel Trends Report in** the industry. Developed with market-leading research experts at Kantar, this report will look into the future of food and opportunities to elevate the mouthfeel of your products, to always keep your brand on consumers' shopping lists. With our combined businesses, we are strenghtening our ability to master **mouthfeel**- and to be your partner in renovating and innovating delicious foods and beverages today and tomorrow.

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Welcome to the Future of Mouthfeel

Are you ready for the **next formulation waves?** New trends are set to disrupt the industry mastering mouthfeel will be central for your brand's success.

First thing's first - what is mouthfeel?

Have you ever wondered why you like your favourite foods and drinks so much? One crucial factor is surely the flavour - but is that all there is to it?

Think of a person who loves chocolate-flavoured cookies. Besides the chocolate flavour, they probably like them for other reasons, such as their visually crumbly appearance, which suggests texture even before taking a bite. That crunchy shell that, when bitten, breaks with a soft sound to reveal a moist interior, with a creamy and slightly chewy filling.

So, what is mouthfeel? Well, it's all of these elements – and more.

Mouthfeel is a part of the overall "taste experience". It is the texture and sensation you experience when consuming your favourite food and beverages. This includes how food looks, tastes, sounds and feels in your mouth.

Together, these sensations create the full experience of eating, impacting not just how food tastes, but how it feels in our mouths – critical factors for keeping consumers happy, and food and beverage brands successful!















Key mouthfeel trends

In partnership with Kantar, we undertook a comprehensive research methodology to identify nine everchanging mouthfeel trends in the food and beverage industry. Our approach began with an analysis of macro forces influencing consumer behaviour, focusing on economic, environmental and societal shifts. Key factors included urbanisation, rising living costs and concerns regarding water quality.

We then translated these macro insights into specific food and beverage trends. Expert interviews with research and development specialists, chefs and academics provided diverse perspectives on consumer preferences and behaviours on a global scale.

To further deepen our insights, we also employed social media analytics to the very latest conversations about mouthfeel across various markets, including Indonesia, Japan, United Kingdom, USA and Brazil, illuminating public perceptions and preferences.

Finally, our trend analysts decoded new product development manifestations, examining how trends appear in both out-of-home and packaged goods. By synthesising insights from these varied sources, we identified nine key mouthfeel trends, sharing an insight into the future of our food and beverage experiences.

Our thinking process started at a macro-level and zeroed in on the mouthfeel trends...

Macro-forces

Wellbeing

Political

Social

Environmental

Economic

Technological

An analysis of macro-forces creating change in the way people cook, eat and access food - resulting in key implications for the world of food and beverages.

Food and beverage trends

Plant powered

Hyper-convenience

Clean-label

Responsible eating

Elevated experiences

and more

We clustered the Implications of the macro-forces and layered further insight from expert interviews, Trend scoping, NPD decoding and Social analytics to develop food and beverage trends.

Mouthfeel trends



From food and beverage trends, we unearthed a long list of Mouthfeel Implications. These implications are clustered into nine mouthfeel trends!



Trend two

Air: The Next Magic Ingredient

In contrast to crunch, air is all about making foods lighter, making them melt in your mouth and giving bubbly sensations that deliver both indulgent and calming mouthfeel.

Across food and beverage categories, there is a growth in the use of air to create more elevated experiences that melt, pop, flake, and fizzle on the tongue. Air delivers a strong juxtaposition to the loud boldness of crunch, and consumers are finding joy in the gentle dissolving of voluminous bubbles in the mouth.

The most prominent example of air incorporation is the use of foams and froths, where air can be used in some categories to create a sense of elevation.

Desserts and baked goods use air to deliver elevated flakiness, 'moussey' and creamier textures. Confectionery and sweets are incorporating light aeration to introduce a pillowy, soft mouthfeel.

Baked goods, beverages, and desserts are utilising air to add volume, provide a fuller mouthfeel, and mimic satiety. Moreover, it has the potential to mask ingredients like protein and collagen by 'lightening' the mouthfeel experience.

What does this mean for innovators?

Where there is air, there's room for innovation—protecting airy textures in packaged goods and creating foams, froths, and whipped desserts at home. Leveraging air can create healthier products by increasing their volume, as seen in mousse-style desserts. With products packed with air, satiation can be achieved with a lower caloric intake.

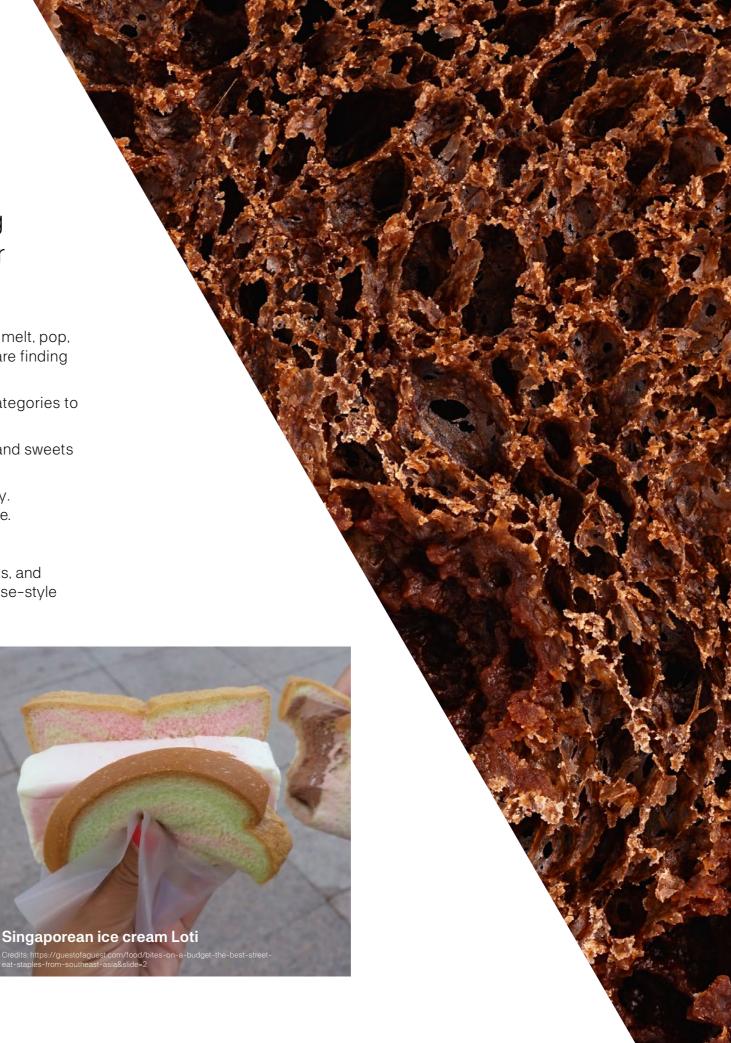
Where's best for air?

Whether it's whipped, puffed, or frothed, more categories are entering the airspace.

Today, air is used in puffed and popped snacks, baked goods, desserts, and beverages. The 'air trend' will increasingly enter households through alcoholic and non-alcoholic beverages – the 'nitro' trend seen in some beers migrated to be seen in coffee beverages and even soda. Canned flavoured foams help consumers elevate their 'barista' experience at home adding lightness to coffee.

In baked goods, the airy inspiration comes from the East, where lightness is a key attribute seen in products such as the pandan cake, chiffon and crepe cakes, and the trendy Singaporean ice cream Loti, an airy sandwich bread dessert, all of which are starting to emerge in western menus.

Fermented foods, frozen desserts, cheeses, and butter are also incorporating more air for an airy, frothy, and creamy mouthfeel, as seen in innovations such as whipped feta, a lighter mouthfeel version of the cheese. Cotton candy has been doing this for years, and other sweets and confectionery will likely follow, along with salad dressings and sauces.





Trend four

Next-gen Naturality

Consumers are increasingly seeking cleaner labels and ingredients in their food and beverages. "Next-gen naturality" balances recognisability and convenience without sacrificing mouthfeel, shelf life, or sensory experience.

The next-gen naturality trend taps into the growing desire for food that feels real, made with a home-cooked feel and ingredients people recognise and trust. This shift spans from snack bars to everyday meals, as consumers increasingly look to avoid artificial additives and preservatives while still enjoying convenience. For some, it's about replacing highly processed elements with whole ingredients like fruits, vegetables, and grains; for others, it's about balancing naturality with time and budget constraints. As the pendulum swings between these preferences, the aim is for a future where convenient and accessible options are also more naturally formulated.

Sub-trends like 'clean label' showcase this demand for simplicity, as more people expect ingredient lists free-from synthetic additives. Innovations like natural thickeners and gentle processing techniques—such as freeze-drying and cold-pressing—are keeping ingredients fresh and flavours intact without compromising mouthfeel or shelf life. Products with visible inclusions, like seeded breads, drinks with fruit pieces, and naturally coloured snacks, provide recognisable quality that satisfies the balance of naturality and convenience that consumers seek.

Trends in play

Snack bars made entirely of fruits and nuts leverage these natural ingredients for their nutritional content and the textural sensations they add to the product. D'Avocado's preservative-free chocolate avocado pudding is another example of leveraging avocado, a natural ingredient, for its nutrition but also the fatty mouthfeel that makes pudding delicious. Yogurt brands such as Chobani utilise tapioca starch, which comes from the cassava root, to thicken and create a glossy appearance with creamy mouthfeel.

Innovators are presented with the need to balance cleaner labels with sensory appeal, employing techniques like freeze-drying and natural thickeners to maintain product integrity. It's an enticing possibility, and those who can find a way to navigate these demands will be well-positioned to capture health-conscious consumers in an increasingly health-conscious world.



Chobani yogurt

https://www.chobani.com/products/yogurt/zero-sugar/vanilla-cup

Trend five 11 | The Future of Mouthfee

Convenience and Shelf **Proof Mouthfeel**

As consumers juggle busier lives, they demand convenient foods that deliver on taste, texture and nutrition. Achieving satisfying mouthfeel with minimal prep and longer shelf life is the next frontier

The demand for convenience is soaring, but consumers refuse to compromise on taste or mouthfeel. They expect ready meals, snacks, and small dishes that maintain texture-even after extended shelf life.

Innovative processing technologies, such as freeze-drying and vacuum-sealing, are crucial for preserving freshness and flavour in shelf-stable products. Recent innovations in ingredients also support the delivery of great mouthfeel in convenience foods. Startches are highly recognized for their functionality in keeping products fresh and tasty through freeze-thawing and long shelf life - and new innovations from Tate & Lyle are continuously pushing these boundaries.

Convenience must also be versatile. Products that transition seamlessly from lunchbox snacks to main meals are driving growth in this sector. Flexibility, freshness, and sensory consistency will be crucial for brands aiming to win over consumers in the future of convenient eating.

What does this mean for innovators?

For innovators, the path forward involves addressing a number of formulation requirements: retaining freshness and the feeling of a home-cooked meal texture in foods that are shelf-stable, or frozen and thawed a number of times, whilst being easy to prepare. One of the biggest hurdles is the preservation of texture—whether it's keeping vegetables crisp, maintaining the perfect moisture in meats, or ensuring sauces stay smooth and creamy.

Another key consideration for future innovation will be finding ways to optimise quick-prep methods like microwaving and air-frying. Brands must ensure that these techniques don't compromise on an exemplary sensory experience. Lastly, finding new ways to minimise packaging waste while ensuring the food's integrity remains a priority as consumers demand eco-friendly options.

Trends in play

- · Campbell's Sipping Soups Smooth, shelf-stable soups for onthe-go consumption.
- Franco Manca cook-at-home pizza Convenient frozen pizzas with the same crispy and chewy crust of Neapolitan pizzas they serve at their restaurants.
- Ramen Raijin Frozen ramen kits preserving authentic noodle chew. During the pandemic, when customers couldn't join them in restaurants, Ramen Raijin developed a frozen ramen kit with a winning formulation to be able to scale the delivery of ramen while preserving the key mouthfeel attributes such as the chewiness of the noodles.



Trend six

Mouthfeel Mimicry

As consumers seek healthier, affordable, and more sustainable food alternatives, they remain unwilling to sacrifice the familiar textures they love, driving the need to reformulate while retaining mouthfeel. This push for mouthfeel mimicry is revolutionising categories from dairy to desserts.

Mouthfeel mimicry categories

As the trend for mouthfeel mimicry grows, it can be broken down into three key areas, each addressing different consumer needs and motivations:

- 1. Compromise-free plant-based alternatives: As demand for plant-based options grows, consumers seek indulgent, creamy textures similar to traditional foods. Credo Foods' oat milk-based spray cheese and Trader Joe's vegan brioche replicate the mouthfeel of dairy-rich cheeses and breads, satisfying cravings without dairy or eggs.
- 2. Health mimicry: Health-focused consumers want guilt-free versions of their favourite textures. This trend is visible in crunchy, nutrient-dense snacks like shiitake and okra chips, offering potato chip-like satisfaction with added health benefits.
- 3. Accessible luxuries amidst the cost-of-living crisis: Amid rising prices for luxury ingredients, consumers look for affordable alternatives that don't sacrifice indulgence. Brands respond with budget-friendly innovations, such as chocolate-flavoured treats and plant-based ice creams that recreate the creamy mouthfeel of traditional favourites at lower costs.

What does this mean for innovators?

Mouthfeel mimicry offers innovators opportunities to create indulgent products that prioritise health and affordability. As traditional ingredients rise in cost, exploring alternative options becomes essential.

This means innovators must find ways to refine their skills in recreating the creamy richness of dairy, the juicy tenderness of meats, and the flaky textures of pastries. That requires skilfully combining plant proteins, fats and stabilisers to achieve the desired mouthfeel without sacrificing flavour.





Trend eight

Blissfully Boosted

The blissfully boosted trend is redefining food by blending exceptional indulgence with added functional benefits, allowing consumers to enjoy their favourite flavours alongside added health support. It's about foods that don't just taste good—they do good. From nutrient-packed hot chocolates to enhanced snacks, this trend is transforming every bite into a step toward holistic wellbeing.

The blissfully boosted trend reflects consumers' desire for foods that are both indulgent and supportive of their wellness goals. Leading this movement are products like high-protein pasta sauces, nutrient-enriched crackers, and probiotic drinks, which combine enjoyment with nutrition by incorporating functional ingredients such as botanicals, probiotics, and plant-based proteins into familiar favourites like high-fibre breads, protein-enriched creamers, and antioxidant-rich energy drinks. These enhanced foods allow consumers to savour their everyday choices, safe in the knowledge that they are also enjoying added benefits typically associated with supplements.

This trend has a global reach, adapting to suit regional preferences. In Japan, there is a focus on skin health and relaxation, with functional foods tailored to enhance beauty and wellbeing. In the UK and US, convenience and natural ingredients are the priority, resulting in a wave of fortified snacks and beverages designed to deliver specific health benefits. Meanwhile, in China, traditional medicine is increasingly integrated into functional foods, tapping into the appeal of natural wellness solutions.

For brands, the opportunity is there to deliver taste, texture, and visual appeal while seamlessly incorporating functional benefits. With wellness now a central focus, brands are innovating to meet this demand, adding flavour-forward, health-boosting ingredients that feel as natural as they taste. The blissfully boosted category is set for growth as consumers continue to seek foods that align with their lifestyle goals without sacrificing flavour or enjoyment. For example, Yfood developed a bar with a complete nutrient profile, with a good balance of carbs, protein and fibre, along with 25 vitamins and minerals. The taste is as complete as the nutrition, with the bars boasting numerous layers with playful textures that make up a complex mouthfeel experience.





Food for Thought

As this report has shown, mouthfeel represents an **amazing opportunity** for food and drink brands to **capture the senses** of consumers.

Taste remains front and center—and mouthfeel is the key to unlocking it! For brands, prioritising taste and innovation in their pipelines is essential as they explore new dimensions of texture and sensory experiences.

However, additional forces are shaping the future of innovation, affecting both taste and mouthfeel.

Consumers are ever busier and are increasingly aware of their health, but their grocery budgets are constrained. The task of formulators is to reformulate and innovate products that tick all of these boxes while providing the desired taste experience. Mouthfeel can't be sacrificed during reformulation, otherwise consumers may shy away from their usual brands and turn elsewhere.

Additionally, environmental concerns are now a major force in the food industry. Climate change will drive innovation as retailers seek ways to maintain food quality despite rising temperatures.

Tate & Lyle and CP Kelco are mastering the marvel of mouthfeel. Our combined team of experts is equipped with the cutting-edge science and consumer insights to help customers across a range of categories.

Our combined portfolio is a market leader in mouthfeel, with more than 250 speciality starches, clean label texturants, alternative flours, a range of fibres including corn, citrus and FOS, hydrocolloids such as xanthan gum and pectin, and so much more.

We are eager to partner with you to innovate and renovate your products for the future of food, leveraging the trends we have mapped and ensuring an outstanding taste and mouthfeel that will keep consumers coming back for more.



