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## **TEAM CREDITS**



Survey Designer and Editor-in-Chief Rushina Munshaw-Ghildiyal

Survey A Perfect Bite Consulting

SURVEY

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## A B O UT THE A N N U A L G O D R E J F O O D T R E N D S R E P O R T

Since its inception in 2018, the Godrej Food Trends Report has emerged as one of the most credible platforms on themes that significantly impact the food industry each year. Over the years, the report has continuously evolved to include a wider group of industry experts who are encouraged to reflect on the year gone by, and share their projections on key themes that will influence the industry in the coming year.

The Godrej Food Trends Report has been facilitating deep conversations in the food space each year. Over the last 6 years, the report has drawn on insights from *over 1500 experts and thought leaders* from food, beverage and allied industries *spanning across industry verticals and geographies.* 

#### Media Coverage

The special 2022, fifth-anniversary Collector's Edition of the Godrej Food Trends Report alone drove **over 200 news features across six languages** reaching regional and global audiences. This report was downloaded by nearly **200,000 people!** 

Over the last 6 years, the report has driven over 1600 media conversations and been read by over 500,000 people.

#### **Awards and Accolades**

The Godrej Food Trends Report has won several awards and accolades for both concept and design. The 2022 Collector's Edition won Silver at National Level and Gold at Regional Level at the AFAQS Foxglove Awards 2022 and was awarded two Silvers at the PR Awards 2022. CAPTURING THE EVOLUTION OF INDIAN CULTURE THROUGH FOOD AND CULINARY TRENDS.











GFTR 2022 Launch Video click here

## **Appreciation for Godrej Food Trends Report**

#### \_\_\_\_\_

Godrej Food Trends Report covers a broad spectrum of overviews, both globally and locally. As a result, it has helped me plan and enrich my columns, stimulated my thoughts and improved the depth of my own food research. The survey is very well planned and the editorial curating is outstanding!



Dr. Pushpesh Pant



Chef Vikas Khanna I absolutely love the Godrej Food Trends Report. I think, all of us in the food industry need to constantly stay tuned to trends. I'm always referring to it and especially Rushina to understand how different chefs are thinking and new trends are playing out. And many of them are spot on! These trends really help me understand how we should lead globally with Indian cuisine and the challenges and the competition from international cuisines. Godrej Food Trends Report is a good barometer on what's going to happen, where to invest, and, most importantly, to safeguard the security of our cuisine, which now has custodians.

The Godrej Food Trends Report is the food equivalent of fashion trend forecasts. A food trend forecast BY the Indian food industry FOR the Indian food Industry. Having been part of the respondent panel from the beginning, I know how much work goes into it. It is super that we have this resource, which, instead of taking cues from the West, looks within our collective industry psyche to predict what India will love and what will drive food conversations in the year to come.





Chef Garima Arora

Perceptive, nuanced, and well-researched, the Godrej Food Trends Report offers a window into the many micro and macro food trends that evolve in a country as diverse and plural as India. It is a great knowledge resource and reckoner for people in varied fields of the F&B industry.

## A NOTE FROM Tanya dubash

Hi! These are exciting times for the food industry! It was evident that the pandemic had resulted in changes in consumption patterns and consumer behaviors across the entire spectrum of the food industry. We are only now beginning to recognize the impact of these changes in our daily lives. The Godrej Food Trends Report is uniquely positioned to bring the nuances of this evolving foodscape to the forefront for the benefit of the F&B industry. I have personally always enjoyed watching food trends in our country, especially the year-specific trends predicted by our esteemed panelists. It gives me immense joy to see many of them coming to life subsequently.

Our 5th edition of the Godrej Food Trends Report in 2022 was a collector's edition and was truly special in many ways. I am happy about the excellent response it had from the readers. It also went on to win several awards. My sincere gratitude to all who contributed towards it and made it so rich in its content.

Inspired by the enthusiastic response, we set out with an aim to make the next edition even better. I am happy to present to you, the 6th edition - complete with the latest trends in the food and beverage industry!

While the trends forecast remain central to this edition, the team has continued to push the envelope with additional new elements to make the report even more insightful, and useful for you. I'm happy to see that the deep dive sections that were added to the format last year have been very well received and have driven powerful fresh conversations in the industry. Which is why we have made them a permanent feature. I hope you enjoy the mix of essays and conversations around various segments of the food space in India by some excellent writers.

This year, I am personally excited to see growing international interest and recognition given to India for its rich culinary diversity, along with a growing demand for culinary knowledge and skills across all segments. We have so much to offer to the world, and the industry will do well by investing serious time and resources into research and documentation of our inherent wisdom so that we can collectively reap the benefits brought in by the global interest in our future propositions.

Indian cuisine is going to see a glamorous era within and outside India in years to come! And I look forward to seeing, hearing about, and tasting food that is representative of a lot more variety within and outside conventional cuisines.

This edition has so much more for you all. I do hope it sparks new ideas for you and your colleagues in the industry in 2023 and beyond!



*Tanya Dubash* Executive Director & Chief Brand Officer Godrej Industries Limited & Associate Companies



## A NOTE FROM Sujit Patil

It is my pleasure and privilege to welcome you to yet another edition of the annual Godrej Food Trends Report (GFTR)!

It feels great as I reminisce the first edition of the GFTR that we launched way back in 2018 under the banner of Vikhroli Cucina. The vision was to spark conversations, build a pan-Indian food community and provide a platform for industry specialists to cross-pollinate ideas and set trends.. When I look back at its evolution and the expansive range of trends-related conversations the report has driven, I feel grateful to all who have contributed to it and made it possible, year after year.

I am so happy to share that the 5th edition in 2022 - which was a collector's edition, was a pivot for us, in which we expanded the scope and format. And it was very well received, going on to win a slew of awards, at regional and national levels. Not to mention that it was downloaded by over 2,00,000 people! A fantastic milestone, indeed! Well done team!

And now it is time for the 6th edition! The journey of this edition began way back in October 2022 with team GFTR reaching out to our hundreds-strong respondent panel through our survey, which is the crux of the entire report. Once the data had been gathered, the analysis was undertaken, along with in-person interviews and contributions from some of the top thought leaders of the Indian food space.

This year, India is in focus for its rich culinary heritage and more, and I am sure like me, you have also been wonderstruck at the staggering variety of food and culinary cultures India is home to. I hope you enjoy discovering some of that through the variety of essays, and insights in this edition! As a foodie, I am particularly excited by the idea that Indian-made artisanal cheese will be in the spotlight! I think we can all look forward to some exciting flavors on the plate! Well, there are many more amazing trends that I am eager to share right away. However, I don't want to steal the excitement of you reading about the trends in the report.

And now, without further ado, I leave you with our latest edition of the report, but not before I thank every single person who has contributed to this report - our respondents, collaborators, my corporate brand and communications team at Godrej Industries, designers, advisors, and most importantly Rushina, who has done a stellar job curating, sourcing, compiling and presenting both the trend data and editorial dialogues in such a lucid manner.

Cheers!



Here's to the GFTR - 2023!

## Sujit Patil (@sujitpatil)

Vice President & Head - Corporate Brand & Communications, Godrej Industries Limited & Associate Companies



## A MESSAGE FROM RUSHINA MUNSHAW-GHILDIYAL

I am so excited to invite you to another edition of the Godrei Food Trends Report.

At this stage of production, when it is time to go to print, my family and friends are known to excuse my preoccupation with "you are in GFTR mode!" Six years into the annual exercise that is creating the Godrej Food Trends Repeort I'd say it was part of the job, but I would probably be more accurate in attributing it to passion. And the pursuit of joy! My joy in geeking out on a topic I have come to deeply love - food trends. And anticipation of your delight in discovering each new edition and its usefulness in your endeavours.

I'm not alone in this pursuit. Each of us connected to food is chasing joy in some form. For the food lover, joy may reside in a much loved dish at a favourite restaurant. For the home cook it might be in a successful kitchen experiment. And for a baking enthusiast, it might be in the perfect macaron. For this industry, joy rests in a job well done, an article well written, a successfully launched concept, a dish that resonates, and particularly in a patron's satisfaction. My job with this report is to help you find your joy. And I take that very seriously!

This year too my work begins with evaluating how we can enhance the next edition. I am excited for you to discover the many new elements we've incorporated based on your feedback. This year, look forward to lots of strategic actionable elements to inspire and empower you in 2023. conclusions and action points at the end of each deep dive section, as well as summaries and toolkits at the beginning of each survey section. I'm especially proud to share that team GFTR has worked hard to cover more industry verticals and geographies than ever before. Our much-expanded respondent panel carries regional perspectives from over 90% of Indian states while our overall panel represents a much fairer ratio between genders than ever before.

Every edition of GFTR, from concept, through execution of every stage, is a journey full of tantalizing visions. Eventually however all the hundreds of inspiring conversations with industry colleagues, and endless discussions with editorial and design teams, begin to come together, page by page, until this moment, when I write this editorial note. A moment that I savour because it concludes months of frenzy and signals there is nothing more I can do. My job, for the moment, is done. Its time for me to leave you to discover this new edition of the Godrej Food Trends Report. I hope it sparks joy and much success for you and your brand in 2023 and beyond.



Rushina Munshaw-Ghildiyal Curator and Editor-in-Chief MD, A Perfect Bite Consulting



## HOW TO USE THE GODREJ FOOD TRENDS REPORT 2023

## What does the report contain?

The Annual Godrej Food Trends Report is designed to be an impactful and accurate resource for stakeholders from the Indian food and beverage industry as well as their counterparts in global entities looking towards building propositions in India.

The foundation of the report is a survey that collates insights

## Who is the report for?

The simple answer is, it is for anyone with even the smallest stake in the Indian food Industry. It has been designed and laid out for a variety of audiences like;

#### Industry Players

Chefs, restaurateurs, owners and managers of large and small food brands, home chefs and food entrepreneurs can use insights on consumer consumption patterns to plan concepts and cuisines, to invest energy and resources into designing menu offerings, strategise on festivals, special menus, and design PR and marketing strategies for the year to come.

#### Hospitality Institutions

Culinary colleges and hospitality students can draw on insights to understand directions the

## How to navigate the report?

The 2023 edition of the Godrej Food Trends Report, has eight sections: *Dining In; Dining Out;* Health. Hygiene and Lifestyle: Food Studies; Emerging *Conversations;* much expanded sections for *Beverages;* and Desserts. Happily, the Food and Travel Section is also back.

Each section of the report has two subsections - the first providing a comprehensive overview of the section's theme over the years, followed by a detailed report on the projections made about its evolution in the coming year by our expert panel. Here's how to make the most of them.

on dining-in and dining-out behaviours of customers. gathered from a panel of respondents that include global voices, celebrities, pan-India and pan-industry respondents. The analysis of the data gathered spans across quantitative and qualitative parameters. and is analyzed vertically and

horizontally to forecast the coming year's (and sometimes bevond) trends.

We recommend giving the whole report a read once, then going back to look at specific sections for deeper understanding as required.



market will take and plan the curriculum, events, special lectures and personal study projects.

Food Media Professionals Food journalists, lifestyle, food and travel writers, food bloggers and social media content creators can draw on this report to plan editorial calenders, pitch trend stories, plan deep dives for research, article pitches and content creation, and strategise on social media content creation in the year to come. In the past, the report has also been recognised as a useful source for triggering new story ideas when writer's block strikes.

#### F&B Marketing & Communication Professionals

Marketing, communication and PR professionals across categories can use this report as an advisory tool for future forecasting, to suggest brand positioning, marketing strategy, and create brand and product messaging as well as social media content to widen existing customer base and tap new markets for their clients.

## Food lovers

Food connoisseurs, hobby cooks and bakers can look to this report to expand their own understanding of the culinary space and learn more about the kind of food adventures they can look forward to in the coming year.



## Deep Dives

Each section starts with a **Deep Dive** that takes a comprehensive look at a topic that has shown resilience during analysis. Each deep dive opens with a Visual Spread filled with interesting and useful information that makes for an enlightening casual read. It can also potentially

trigger further study and exploration, or perhaps even instigate conversations on social media. Turn the page to gain deeper insights on the core theme of the section through a rich, well-researched *Deep Dive* showcasing the evolution of topics in focus.

#### Action Points

A succinct *Conclusion* at the end summarises the actionable

takeaways that the reader can leverage from the essay.

#### Survey Results

The Survey sub-section starts with a **Section At a Glance** that summarises the high-points of the trends in that segment. This page also carries and a **Toolkit** that suggests areas to explore for different stakeholders in the F&B industry. Team GFTR itself keeps returning to explore





### Who are the experts contributing to this report?

The names of our panel of industry experts who contributed to this edition of the Godrej Food Trends Report have been listed alphabetically at the end of the report. It is our way of thanking our esteemed panelists for their valuable contributions to the report, while also offering our readers

an overview of the different people and roles that make up our industry, and for them to follow, connect and build networks.

## Notes

## **TOP TREND PREDICTIONS FOR 2023**



## INDIA WILL BE **RECOGNIZED AS AN ATLAS OF FOOD**

The world has historically perceived Indian cuisine as a monolith. This notion has been gradually dismantled over the last decade with a growing realisation that culturally, India is more a continent than a country. with as many cuisines as there are dialects. 2023 will see an unprecedented rise in global interest towards India's culinary plurality and prodigious ingredient diversity.



## INDIVIDUAL **CREATOR** BRAND-DRIVEN' **EXPERIENCES** WILL GROW

All through the pandemic, F&B practitioners and creators nurtured communities that appreciated their creativity and philosophy towards their craft. In 2023, these communities of fans will seek interactive experiences that revolve around the practitioners and others like them. This is probably the best time for creative individuals with unique culinary concepts, menus, and stories to build a brand around themselves, through content and experiences.



## **NOSTALGIA WILL BE A POWERFUL** PROPOSITION

With the siege mentality of the pandemic still impacting people, 2023 will see Boomers, Millennials, and GenZ seeking comfort in nostalgic foods, flavours, and brands. Expect nostalgia-invoking propositions in classic and re-invented avatars on grocery shelves, in offerings from home chefs and small businesses, and on house-party menus. Retro-themes will also inspire restaurant décor. packaging, merchandise, digital collectables, and content across all platforms.

PAN-READY,

**HIGH-FLAVOUR** 

**SOUGHT AFTER** 

**SNACKS WILL BE** 

in a number of avatars to suit

varied demographic and dietary

requirements. Convenience and

taste will be driving factors, with

consumers gravitating towards

distance between pan and plate

and strike high notes of flavour.

such as local Indian ingredients,

and regional flavoured frozen

kebabs and snacks will be

attractive and satiating.

Offerings with novelty value

options that require the least



## COLLABORATIVE **POP-UPS WILL SEE GREATER** PROLIFERATION

2023 will see diners spoilt for choice, with restaurants offering a milieu of exciting concepts and menus through creative collaborations within and outside the industry. In addition to providing an immersive and educational experience for diners, restaurants will use these pop-ups to test new ideas. concepts, themes, cuisines, and formats, within existing and emerging markets.



## **DEMAND FOR** SAUCES & CONDIMENTS WILL GROW **EXPONENTIALLY** 2023 will see snacks re-invented

The quest for flavour that is driving the snack segment will also drive similar demand and innovation in the sauces, dips, and condiments segment. Accompaniments that elevate snacks and bring zingy variety to meals will proliferate store shelves and in kitchen cupboards. They will also be carried home from travels to add global nuances to meals at home. The easy, fun factor they add to meals will also inspire content creation amongst creators and food media.



## TRADITIONAL LOCAL OILS WILL BE HOT!

We will see a resurgence of traditional fats over international options in daily consumption, driven by the rotation of oils for health and the exploration of regional cuisines, specifically the role traditional fats play in local flavour profiles. In 2023, the average Indian home will stock up on a greater variety of regional fats for daily use wilfully differentiating by application and cuisine.



## EXOTIC MUSHROOMS WILL BE **EVERYWHERE**

An increasing number of players will expand the world of mushrooms beyond the ubiquitous Button to encompass locally-grown fresh mushrooms like Oyster, Portobello, Shimeji, Enoki, Lions Mane, and more. Expect to see them featured as exotic, clean, plant-proteins, and welcome flavour and texture alternatives to paneer and tofu on vegetarian, vegan, and plant-based menus to excite diners and home cooks in 2023.



## **INTEREST IN YOGHURT AND** WHEY-BASED BEVERAGES WILL GROW

The value beverages add or subtract from the diet will drive increased interest in mindful consumption. Yoghurt and whey-based/enriched beverages offer protein-rich, probiotic alternatives that are also accessible to those with lactose intolerance. Expect these options to multiply across the dining out and in-home segment and also attract the teetotaling health-conscious consumer.



## **DESSERTS WITH** HEALTHIER **CLAIMS WILL BE** IN DEMAND

Sweets have been heading the healthy way for a while now. 2023 will see consumers and diners increasingly gravitating towards mindful,

portion-controlled indulgences made with good-for-you ingredients like natural sweeteners, millets, and more.

Individually-portioned sweets will be preferred for flexibility of options in group settings. Sweets - especially

single-portion offerings - will also cross over into snacking.



## **DEMAND FOR** CULINARY KNOWLEDGE AND SKILLS WILL GROW

With positive and significant growth projected across segments of the food industry. be it dining out or dining in, health, beverage, food travel, food studies, or sweets and desserts sectors, hobbyists and professionals alike will invest serious time and resources into broadening their knowledge and skill sets in specialised areas to prepare themselves for future projects.



## INDIAN-MADE ARTISANAL **CHEESE WILL BE** IN THE SPOTLIGHT

Dairy-rich India has been a well-primed market for cheese. Supply chain disruptions accelerated a steadily growing segment of small and artisanal cheese makers across the country. Existing players expanded their scope while hobbyist cheesemakers turned professional. All of this will drive focus on locally made cheese and shine a spotlight on indigenous Indian cheeses such as Topli paneer, Kalari, Churrpi, and Bandel.

## **REGIONAL PERSPECTIVES**

It's been quite a year in the wake of the pandemic, and its long-lasting impact has brought a paradigm shift in the food industry and food systems at large, forcing the consumer, and the industry, to reprioritise. The silver lining in this is that it has highlighted the immense plurality and diversity of Indian cuisine. India is a country on the global map. But it would perhaps be more accurate to describe it as a continent, and its states could more aptly be likened to countries. Because each state and union territory is home to multiple culinary cultures and cuisines.

India's rich multi-cultural and communal history adds layers of nuance to food traditions at home and local palate preferences with street food and dining out. Add to this the varying degrees of industry evolution, and India becomes a fascinatingly complex proposition for food explorers and businesses. This is why this year the Godrej Food Trends Report has attempted (perhaps ambitiously) to bring in regional on-ground observations from all over India on local dining culture in the wake of the pandemic. Read on to discover how food preferences evolve as one moves down the map of India based on insights our team has gathered from regional food experts.

## Ladakh

Extreme climates have always driven consumption patterns in Ladakh. Traditionally a resilient and self-sustaining food culture that depended on subsistence farming and a sustainable lifestyle, in-home dining has seen a decline. "Rice has replaced wheat and barley, and masalas have replaced local herbs in traditional dishes. And with stores stocking global goods, instant noodles and commercial bakes have replaced traditional snacks like roasted/puffed barley, sweet apricot kernels, dried apricots, apple chips, and traditional local biscuits and breads like puli, khar-e-tagi, thalshrak, pa-polo".

"While street food isn't really a culture given the climate, tiny establishments selling momos, thukpa, gyuma (traditional blood sausages), tujji (Kashmiri term for marinated charcoal-grilled meat) are found in populated areas, as are those peddling the ubiquitous instant noodles, (which in my opinion will be the death of Himalyan cuisines!)". Dining-out establishments largely operate during summer, based on availability of seasonal fresh produce and higher footfalls from tourists but down shutters in the harsh winters. Tibetan, Ladakhi, Indian-Chinese, and Continental cuisines are mainstays, but Korean and Japanese cuisines are finding a niche now. And cafes, coffee shops, ingredient-driven/concept-based contemporary restaurants are also mushrooming all over



With inputs from Kunzes Angmo

#### Jammu and Kashmir

Like Ladakh, Kashmir is prone to harsh climates. With a legendary regional culinary culture that is home to the iconic Kashmiri Wazwaan. Kashmir continues to hold on to its rich culinary heritage in its home kitchens. Street food culture has also always prevailed, and is in fact on the uptake with offerings like nadir monje (deep fried lotus stem fritters) and tujji becoming popular again. Dining out offers a great opportunity for socialisation in a climate where people are often snowbound.

"We have seen a lot of development there in the last two years, with boutique eateries run by local players mushrooming and the variety of cuisines on offer increasing. Eating habits have changed a lot, especially with the youth who are gravitating to aspirational new brands like KFC, Pizza Hut, Belgian Waffle, and more coming in. These big international brands have been slower to come in but are definitely making inroads now".



With inputs from Umar Rather

## **Himachal Pradesh**

Famous for the Himachali Dham or community feast cooked by the hereditary Boti clan of chefs, Himachali cuisine is richly nuanced and micro regional with every valley in the state offering local flavours to explore. Food at home is seasonal, sustainable soul food that is increasingly available to visitors via the growing home stay and guest house segment.

"Snacking has become more frequent and is a mix of healthy and packaged offerings, although traditional snacks like meethi/namkeen mathiyan, sevaiyaan boondi, and pattoday still rule the charts over bakerv items and namkeens". Street foods include siddu (a local stuffed bread), and ubiquitous offerings like golgappa, matar kulcha, momos, instant noodles and chowmein as well as new options like soya chaap and desi pasta. Eating out and ordering in are on the uptake with home delivery available, and restaurants serving Indian, Tlbetan, and Indo-Chinese alongside newer offerings from bakeries and pizza joints.



With inputs from Nitika Kuthiala

#### Uttarakhand

"Uttarakhand is home to a traditional, seasonal, richly nuanced micro-regionally diverse culinary culture, and we are fiercely in love with our traditional ghar ka khaana. Unfortunately, very little of our region's home food is available for visitors outside homes". Snacking habits are changing, but home made traditional offerings like chakotra chaat, nimbu ki khatai, sana hua nimbu, pakodas, patyud (colocasia pinwheels) are still preferred, although the younger generation is easily attracted to packaged offerings. The main cities with tourist footfall have a brisk street food culture with all the ubiquitous offerings, but momos and chowmein are particularly popular. "Urban hubs also have a growing eating out and ordering in culture with home delivery available. The big cities are home to multicultural dynamic populations and have a rapidly growing dining out culture with all the big international and national chains coming in".



With inputs from Rushina Munshaw-Ghildiyal

## Puniab

Punjab and its cuisine need no introduction, Home food in this land of plenty is like the people themselves - hearty, simple and forthright. "Snacking is still more about international fast food, and pizza continues to be in demand, especially with online ordering growing." Street food is pretty cosmopolitan, with the younger generation loving their spring rolls, momos, and burgers. "Dining patterns have evolved in Punjab. While dishes like kadai paneer, dal makhani, parathas, and more are still much loved, the last two years have seen western trends ruling the

Disclaimer - This Regional perspectives section is based on insights team GFTR has gathered from regional specialists. It does not claim to be comprehensive or definitive in encompassing the sheer expanse of food preferences in India

market. Chinese and Italian cuisines are popular. Thai and continental food has found its niche. Lebanese cuisine is new in town and looks likely to gain popularity. Experiential and ambiencespecific dining is ruling the roost."



With inputs from Lavi Kaur and Trishti Bhardwaj

## Haryana and NCR

Celebrated as the the land of agriculture and dairy, Haryana is one of the most complex states to describe. Sprawling between borders with Punjab, Himachal, Rajasthan, Uttarakhand and Uttar Pradesh, Haryana also surrounds Delhi on three sides, and is included in the National Capital Region (NCR) - a vast region with a mixed geography of rural and urban, agrarian and cosmopolitan influences. The food of the rural areas is wholesome, hearty agrarian food rich in dairy, makkhan, and ghee to complement a hard working lifestyle with influences from all its neighbours.

The urban centres, however, have vibrant dining cultures. "Delhi and Gurgaon are now open to vegetarian and regional cuisines. Home chefs do well in close circuits of condos and upmarket apartments in Noida and Gurgaon - but Delhi still likes its food the old fashioned way". Home delivery is focussed on niche brands and gourmet kitchens with an increased focus on healthy options. One growing segment is that of healthy snacks. "Think baked namkeen and roasted muri and no-sugar and multigrain cookies. The common man and the middle class are switching to organic and millet-based nashtas, jaggery over sugar, olive oil over refined, while the more affluent are looking at dates, pine nuts, crackers, artisanal spreads and breads as snacks". Highend restaurants, delivery kitchens, and sit-down dinners offer aspirational experiences. "Street food is the soul of Delhi and nothing will change there. Traditional street fare like matar-kulcha. chola-bhatura, chaat are still popular. But, littichokha, moth-kachauri, and momos have started to appear in Gurgaon. And the public still loves their momos, sushi, kebabs and parathas, but are looking at exclusive ways to eat them".



With inputs from Anubhuti Krishna

#### Rajasthan

The desert state of Rajasthan with its extreme climate has a resilient and self-sustaining food culture that draws from an arid landscape. Rajasthan is perhaps one of the most popular states and its cuisine needs no introduction. Raiasthani cuisine continues to rule the roost and is very easily available for visitors to this popular travel destination. Post COVID, houseparties have become the trend. "When it comes to snacking, a return to the roots has taken over with traditional offerings like mathri, homemade namkeen, and grandmothers' recipes are trendy. Street food consumption is unchanged because no one wants to change it. Rajasthanis continue to be proud of their kachoris and mirchi badas"! Rajasthan has begun to embrace veganism and global cuisines like Thai and Indo-Chinese. Sushi and dimsums are popular. Cloud kitchens and home chefs have grown in numbers in the last two years as well.



With inputs from **Riccha Khetan and** Ratika Bhargava

#### **Uttar Pradesh**

Uttar Pradesh has a rich and diverse culinary culture that spans centuries and reflects in the diversity of its cultural landscape. From the rich offerings of Awadh's erstwhile courtly cuisines to the satvik fare of the Braj region, there are innumerable community and micro-cuisines to pick from. Traditional food is still the preference at home, but meals have become more distinct and healthier. "Snacking has seen a major change with both traditional and trending snacks being favoured. Spring rolls, momos, soya chaap, and a variety of sandwiches have taken over from traditional options like samosa, laiyya chana and khasta". Street food is being globalised. Traditional street food like paani batashas, karari tikki, and galawati kebab are still favoured, but kebab parantha rolls have flavoured mayo. "The pandemic also saw a rise in cloud kitchens and home chefs offering a heady mix of regional and international cuisines. South Indian and Baati Chokha from East UP and Bihar are trending regional cuisines, while global cuisines like Middle Eastern and Mediterranean are gaining popularity".



With inputs from *Tarannum Manjul* 

#### Madhya Pradesh

Dining patterns have changed considerably in Madhya Pradesh post pandemic. Home food has its place, but people are desperate to get out, and dining out has boomed. The street food culture of the region has always been vibrant and is growing massively thanks to social media-worthy street food visuals. Vendors have hiked their rates, and fusion food has been trending. "Restaurants have been experimenting with fusion and Indian food, which is loved in central India, and people are driven towards 'Instagrammable food', be it a fancy version of pani puri with molecular gastronomy or a 5-course meal. There is a significant rise in home chefs and cloud kitchens, and the industry is shifting to investing in cloud kitchens over dine-ins".



With inputs from Mudra Keswani

#### Indore

Indore is still conservative with experimentation in food. Regional food and family heirloom recipes prevail. Hygiene and food sources are more important than ever. "Street food is the lifeline of Indore (No wonder it made it to the top four street food destinations for 2023!). Indore is known for its poha-jalebi, hot dogs (local take on the burger), Crispy garadu (a winter special of the yam family tossed with a special masala and *lemon juice), kachori-samosa, but options like* Sindhi Dal Pakwaan, Bihari Litti Chokha, South Indian Appe have become popular". Western cuisine seems to have taken a back seat. Regional Indian food like Malwa, Maharashtrian, Rajasthani are popular. Even QSR offerings like rolls are being Indianised with rotis, naans and parathas used for the bread and sauces being replaced by Indian gravies.



With inputs from *Chef Amit Pamnani* 

#### Gujarat

Home to a diverse community and micro cuisines, food is an emotion in Gujarat. The in-home culinary culture in the rural areas is strongly rooted in tradition, but home dining in the big cities has evolved to an elevated construct that draws on seasonal local produce. *"Gujarati snacking is legendary, and farsans like khaman, dhokla, khandvi, ganthia, fafda from local farsanwallas are much loved. However, packaged snacks like chaklis and chips in fusion forms with seasonings like cheese, peri peri, Tex-Mex, salsa, and more are being gobbled up"!* Dining out is the norm with many families closing the kitchen once weekly to dine out – either on street food or at speciality restaurants offering Gujarati thalis like Kathiyawadi food from Saurashtra, North Indian fare, or South Indian snacks. "Street food has always been popular in Gujarat. Regular excursions to indulge in street food are the norm in Surat, Ahmedabad and Rajkot. All the classic street foods are relished, but egg-based offerings are popular, and fusion street food is an adventure especially when liberally topped with grated cheese or paneer"!



With inputs from *Anil Mulchandani* 

#### **Maharashtra and Mumbai**

Maharashtra is vast and home to hundreds of culinary dialects and dichotomies. Mumbai, as the commercial and culinary capital of the region, has been long known for its eclectic dining scene and represents much of the evolution of food in the state. In-home dining is driven by convenience, but comfort and flavour play important roles. Traceable, clean produce, is a wildly successful category! Home delivery is exploding.

"Every craving, diet, and budget can be satisfied via cloud kitchens and food delivery apps. And access to home chefs via social media adds even more variety to the mix. When it comes to snacking, currently, if it's healthy and/or regional it's golden! Consumers are either seeking out raditional snacks by geeking out on every regional variety available or trying to make the *healthiest version possible".* Global options like tempeh, tapioca chips are popular, but everything is good as long as its organic, fried in the correct healthy unrefined oil, and free of added sugar. "Street food vendors are becoming social media savvv and creating outrageous dishes like vada pay stuffed croissants! Restaurants, aware that the diner is far more curious and aware today, are a lot more transparent about both sourcing and technique". Fermentation and plant-based whole foods are seeing a lot of interest, while North Eastern flavours, homestyle Maharashtrian, Goan, and Deccan cuisines are gaining traction. Asian food is becoming more varied. "Most exciting, however, is chefs becoming playful, taking themselves less seriously, focussing on adventure with ingredients, without getting into 'modernist' methods"!



With inputs from **Roshni Bajaj Sanghvi** 

## Goa

Goa has a vibrant culinary culture, and while home food is still the primary option, there has been a shift to in-house dining post pandemic. Aggregator delivery agents are booming, and in-house catering has emerged with home chefs offering specialised foods. "Not much has changed in snacking patterns: evening snacks are still cutlet bread or beef fried chops and ros omelet. And locals still love their chorizo pao, of course! Street food is seeing the emergence of Arabic offerings with shawarma, pita and falafel and sandwich culture continues to be popular". Dining out in Goa is hot and happening! Restaurants are moving towards more vegan and vegetarian options to accomodate shift in consumption patterns. Mediterranean is still popular, but regional cuisine chains offering south Indian and modern Indian fare are cropping up as well.



With inputs from **Nolan Mascarenhas** 

## Karnataka

Karnataka is a massive state with hundreds of micro cuisines and many popular food centres. Its capital Bengaluru is a microcosm in itself. In the urban centres, the pandemic has driven interesting changes. Food at home varies based on local cuisines and produce. While street food is popular and varied, not much has changed with preferences. In the wake of the pandemic, there is a heightened focus on home cooking, especially going back to roots. But flexible routines mean breakfasts, dinners, working lunches, and snacks can all be outsourced from home chefs across the state who offer everything from regional cuisines to restaurant level meals. "In Karnataka, every home has traditional mixtures, deep fried chakli, kodbale, and more in their snack repertoire. And Hot Chips stores are testament to the popularity of local banana and other chips. However, the younger generation is more inclined towards packaged chips and instant noodles". In tier-2 cities, the diner is opening up to non-Indianised versions of international cuisines.



With inputs from *Ruth D'souza Prabhu* 

#### Bengaluru

Restaurants, festivals, and pop-ups are in demand. Snacking has become a meal between meals, increasing consumption of street food like momos, rolls and bakery items as snacks. There is a conscious shift towards healthier snacking options. But biscuits, cookies, and instant products continue to be popular. "The last 5 years have seen a surge in Asian and regional micro cuisines along with Cambodian, Brazilian and Korean. Beverages are trending and food menus are designed to pair well with them. Menus that feature classics with a twist or inventive dishes altogether, irrespective of cuisines, are popular. Everyone has boarded the delivery wagon"! The pandemic increased the demand for home chefs and home-chef aggregator brands. Cloud and dark kitchens are a growing segment.



With inputs from Debolina Ray

#### Kerala

The regional food of Kerala cannot be contained in a few lines. Each district celebrates its own local offerings. "Traditional snacks like Ela Ada (rice parcels with a sweet coconut-jaggery filling), Vettu Cake (deep fried sweetened dough), Neyyappam (ghee fried sweet rice fritters) Pazhampori, and Bhajjis are all seeing a resurgence, some in modern avatars. The demand for non-vegetarian options is driving combinations of traditional favourites with chicken, mutton, or buff gravies like the North Kerala Chatti Pathiri (layered crepe) with minced chicken, continuing to be popular across the state". Street food is as diverse with Thattu Dosa and Rasavada (lentil fritters soaked in spicy rasam) of Thiruvananthapuram, Calicut Kallumakkaya (Mussel), which are nostalgic eats that have withstood the test of time and COVID. That said, chaat and momos are now easily accessible across Kerala. Middle-Eastern food has always been favoured and holds its own. Modern tea chains with menus offering 15-20 varieties of tea and coffee, fusion menus that celebrate local cuisine with Western twists like tapioca nachos or Inji puli chicken wings have become very popular.



With inputs from Anjana Gopakumar

#### **Tamil Nadu**

Tamil Nadu, the southernmost state of India, has one of the oldest culinary cultures, with roots in the Sangam era. Sangam literature talks about five landscapes of the ancient Tamil land: Kurinji (the mountain region), Mullai (the forest region), Marutham (agricultural land), Neytal (seashore), and Palai (deserted land). Nuances of these historical demarcations manifest in the hyperlocal, regional micro cuisines of the regions even today. "Chennai, the capital city, reflects the evolution of food preferences, strongly attached to the traditional but welcoming new flavours. Snacking is getting healthier, but the traditional deep fried crunchies, chips, murukku, mixture, and ribbon pakodas continue to fly off shelves. Highway food meets roadside idlis and biryani with equal aplomb on the streets. Dining out has cloud kitchens and food delivery seeing equal excitement".



With inputs from Ameeta Agnihotri

#### **Puducherry/Pondicherry**

Pondicherry has returned to a degree of normalcy slowly. Food at home stays true to its roots. "Regional cuisines never gained much foothold because regional food was already circulating via long-standing informal circuits of enterprising home cooks from various communities that offer specializations, spanning a gamut from daily meals and Gujarati theplas to special biryanis, Bengali macher jhol and more". Street food in Pondicherry is dominated by small shops and tea-coffee-badam milk stalls. Bajjis/pakodas/bondas, samosas and milk bread sandwiches, are popular, as are sundals (lightly spiced legume mixtures) in a variety of versions that are local equivalents to chaat. Enterprising women also sell panivarams. There has been a sudden proliferation of kathi roll, shawarma, and grilled meat hawker stations recently. Dining out has seen a rather energetic revival of the standard multi-cuisine establishments offering the ubiquitous pizza-pasta-salad-burgers menus. "Smaller, eclectic eateries that specialised in native/wild ingredients and heirloom recipes were obliged to shift to catering and bespoke formats". Single-cuisine restaurants are limited, with the exception of legacy Indian-Chinese ones. Pondicherry has a special place for all things French, so good bakery offerings, crepes. alfresco dining and cafe-like spaces are standard French/European fare found in the sea-side town.



With inputs from Deepa Reddv

#### **Andhra Pradesh**

Dining patterns in Andhra Pradesh have seen significant change in the last couple of years. People are experimenting in the kitchen with exotic, regional, local, and ready-to-cook foods. More than 50% of food consumption in the urban centres is either eaten outside or delivered in. Consequently, cloud kitchens are in demand. "Traditional snacks like bhajjis, vadas, paniyarams and punugulu (crisp idli batter fritters) are loved, but gourmet confectionery, baked products. North Indian and Middle Eastern sweets and snacks are finding preference". Chaat has retained its popularity in street food, but shawarma, sandwiches, rolls prevail, Cafes, confectioneries, and breweries are prominent now, and national and local, made-over brands rule the market. Regional food has had a facelift, particularly dosa and Idli and their variations, while Mughlai, Tandoori and regional food maintain their foothold. Pan-Asian, Italian, and Mexican cuisines are gaining prominence, and desserts from specialised bakers and confectionery houses are very popular.



With inputs from Wilson Raian

## Telangana

The post-pandemic resurgence of dining out has lifted all boats in Telangana. "Home food holds its own. Mirchi Bhajji, Punugulu, Onion Samosa, Murukulu, Sakinalu, and Chekkalu are perennial favourties with chai". The pandemic normalized ordering-in, and consumers are comfortable spending more on premium experiences. New cloud kitchens are differentiating themselves with premium quality. Hyderabad's Irani café and bakery heritage, has dwindled with time but still survives with some cafes helmed by the second generation, evolving into more upscale new-age cafes. Diners seeking fine-dine experiences no longer need to limit themselves to European or North Indian cuisines thanks to a growing legion of enterprising chefs reimaging flavours from the southern states. "One particularly noteworthy aspect of growth is the love for local. It is making its mark in pub grub in the form of dishes like chicken ghee roast, bheja fry and vada and idly fry. Hyderabad's Middle Eastern favourites such as Khabsa and Mandi have moved out of their traditional hotspots like Barkas and gone mainstream". Social media and third-party delivery providers have enabled the unsung heroes of Indian kitchens to step into the limelight, and homechefs are popular for regional food from other parts of the country, like

Disclaimer - This Regional perspectives section is based on insights team GFTR has gathered from regional specialists. It does not claim to be comprehensive or definitive in encompassing the sheer expanse of food preferences in India

pork biryani, Bohri dabba gosht or a Hyderabadi khichdi with khatta and kheema; your best bets are the home chefs.



With inputs from Pallab De

## Odisha

As a traditionally-driven culinary culture, home food hasn't seen much of a change in Odisha, with the exception of homes opting to order in on a weekly basis thanks to the post-pandemic routines. Grocery sourcing is increasingly shifting online, but vegetables are still hand-picked from local markets. Snacking has drastically changed with the increased consumption of online content, which has driven a rise in the 'healthy' and 'luxury' snacking products market. "Easy online recipes have made dishes like nachos, fried mozzarella, and cheese boards staples. Street food in Odisha is vibrant with unique traditional and global options. Traditional street food still triumphs, but there is a heavy demand for Mexican, momos, and Indo-Chinese and shawarma rolls have caught diners' fancy". Dining out is largely indulged in on weekends, with Korean and Lebanese food seeing immense popularity.



With inputs from Rachit Keertiman

## Chhattisgarh

Homecooking still rules in Chhattisgarh with most homes cooking fresh meals based on seasonal locally available produce and minimal spicing. "There is growing awareness about ingredients. organic labelling, hyper-local sourcing. Traditional snacks like chivda, murmura, khurmi, til laddu, and thethri are still in demand, and oilfree snacks like makhana and dry roasted snacks are popular these days. The focus on hygiene and cleanliness have changed the street food scene for good with standards of professionalism going up". Post-pandemic lifestyles have made home delivery a requirement, and people prefer various food delivery apps to order from trusted sources. Weekend parties and casual dining are slowly trending, and home chefs are preferred for smaller party and catering orders. When dining out, the preference is for regional cuisine, local produce, and fresh preparations. There is a lot of curiosity for experience-based restaurants and Japanese, Korean and Mediterranean cuisines.



With inputs from Garima Tiwari

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#### West Bengal

Consumption of food at home includes daily fare, one-pot meals, salads, and healthy food options. Elaborate cooking and experiments are reserved for Sundays and holidays. Ordering has increased, as has eating out on festive occasions. Travelling chefs and food pop-ups have increased. Youngsters want fancy food at home, but the working youth wants regional home cooked food "Kolkata is obsessed with delivery apps, and the majority don't make them at home when they can quickly order. From kebabs to pizzas to deep fried food, snacks have a wide range. Kolkata classics like rolls, mughlai paratha, phuchka, noodles retain their place. Momo stalls and Korean food trucks and outlets are increasing". Cloud kitchens are sprouting, but home chefs are taking delivery to another level by catering to private parties and small gatherings.



With inputs from Anindya Sunder Basu

#### Jharkhand

"Jharkhand has evolved. It is stereotyped with Litti Chokha, and they are wonderful, but Dhuska, Barra, and Gupchup (panipuri) should also be sampled when you are in Ranchi or any other part of Jharkhand. Ranchi being the capital, reflects this evolution. People are no longer hesitant about ordering in. The pandemic has brought people back to the city, and they are opening up coffee shops and food outlets". Malls and streets dedicated to food - from sweet to sayoury to beverages are growing in numbers. The local kathi roll, with its wonderful Bengali influence, is much loved, but there is a demand for dosa, burgers, and pizza. The demand for north Indian cuisine like korma, gosht, and biryani prevails, but fusion food and good continental cuisine is growing in demand.



With inputs from Sadaf Hussain

#### **Bihar**

Food at home continues to be the preferred meal in Bihar, especially in large families, even with dining out and ordering in becoming both popular and frequent. Snacks include chivda, bhuna (roasted gram), makhana and a variety of baked biscuits enjoyed with chai while samosa, kachori and sweets from brands are much loved. "Bihar stays loyal to its litti, samosa chaat, kachori and aloo sabzi served with imarti or ialebi. Newer additions are momos, poha, idlis or sabudana khichdi. Multi-cuisine food is still

strong, but chefs are gradually introducing new tastes. The repertoire has expanded to include offerings like Nasi Goreng, Tempura, Risotto and even Sushi (albeit with cooked fish!)". Cafes are mushrooming with their menus extending beyond coffees, sandwiches, and wraps to Indo-Chinese, North-Indian starters, biryani and chow mein.



With inputs from Farah Yameen

#### Slkkim

This hill station was ensconced in its traditions for centuries until the pandemic changed how people ate. Now families are eating out on weekends, and youngsters, everyday! At home, traditional food like dal-bhat and meat curry are accompanied by dishes created watching YouTube. Home delivery has taken off with local restaurants, some home chefs, and delivery kitchens offering a variety of dishes.

But, meal patterns haven't changed. People eat a rice-based meal in the morning. "In the afternoon, for khaja or snack time, options include momos, chow mein, Sikkimese deepfried cookies, or even Nepali sel roti with tea or aloo dum. Street food continues to focus on aloo chura, samosa, aloo dum and momos, but packaged noodles maintain their stronghold".

Outside the home, Korean food has made inroads; some restaurants serve American breakfasts and Mexican food, but regional food continues to feature Naga cuisine, with Punjabi and Tandoori restaurants in full swing.



With inputs from Doma Wang

#### Assam

The pandemic certainly changed food buying and consumption habits. "Assam is predominantly a meat- and fish-consuming population, but a shift towards more mindful sustainable choices with food & practices is underway. Welfaredriven practices in animal meat production over industrial animal production, and a resurgence of local and seasonal ingredients are some sustainable trends". Assamese cuisine has always been ingredient forward and wholesome, but consumers now want to know the provenance of their food. There's been a significant rise in eating that is driving demand for private catering, curated customised menus, elaborate dining experiences at home. Home chefs and food

delivery are on an upward trend. Dining out is back, with new restaurants offering up a variety of dining experiences and globally inspired menus. There is also a conscious shift towards eating healthy, with many vegan & plant based dishes appearing on menus.



With inputs from Kashmiri Nath

#### Meghalaya

While older generations remain relatively unchanged in their food consumption habits, the younger ones are eating out as much as they eat in. Snacking patterns in rural Meghalaya are unchanged. "Traditional rice-based snacks such as jakep, sakin, gata, putaro, pukhlein and pumaloi stav favourites, but urban centres see a more eclectic mix of offerings in demand, such as momos, chow, rolls, samosas, all sorts of chips, hot dogs, sausages, fish and chips, noodle soups and more". Street food in Meghalaya remains as is. Chicken and pork momos are hands down the most popular choice, with hundreds of street vendors selling them. Aloo muri, aloo chana, roasted corn, peanuts are also popular. Jadoh, a dish of meat, rice and herbs, and street barbeques with chicken and pork are favoured. "Gastro-nostalgia is huge amongst young working individuals from other NE regions, and the demand for Naga, Mizo, Manipuri, and tribal cuisines has grown. There is a huge Korean influenced sub-culture, and Japanese Sushi bars are also popular now".



With inputs from Nambie Jessica Marak

#### Nagaland

"With more and more working class people returning to the home state, having been exposed to outside food culture, a fair selection of people are appreciating non-traditional food". At home, there is a movement towards frozen food. Health consciousness is increasing day by day. Momos, chole and pani puri are popular; people are focused on super foods. Traditional snacks were never mainstream - the only traditional food we get other than the full course meal is Galho, which is a mini meal. Korean food, Muslim food, pastries and coffee are popular.



With inputs from Lichan Humtsoe

## **Arunachal Pradesh**

Ease in road connectivity has changed food habits in Arunachal. In rural homes, traditional cuisine has taken a backseat, with no one willing to put in the effort required to make them thanks to the ready influx of ingredients and gas. "Rice and wheat are replacing the traditional maize, buckwheat, and local red rice. And the typical local beverage. Po Cha (butter tea) made of Yak milk, has been largely replaced by tea and coffee". Pizza and burgers are common. Local foods such as Thukpa, Thekthuk, and Momos are gaining popularity. Locals cater to tourists' tastes, which includes Indo-Chinese food such as noodles, fried rice.

## Manipur

Manipuri food culture is made of different subcuisines. At home, traditional food continues to be consumed. Ordering from restaurants in capital cities like Imphal is on the rise - mainly Manipuri Hindu food, though there is a rise in fast food outlets. "Fish is a staple for the Meitei people, but not meat. Towards the hills, the Kuki or Naga communities eat all forms of meat. With the migration of people from the hills to plains, Naga cuisine is available in most large cities - including pork, chicken, bamboo shoot, and axone". Pizza and burger outlets are now popular, too. Street food includes fried fritters and aloo chop. Bhatoora, which is a smaller poori, served with green peas, as a morning breakfast or snack.

## Mizoram

Mizoram's dining options are mainly converting to Indian-Chinese cuisine with dishes like chow mein, fried rice and soups, "Mizo food is sometimes called 'bland and boiled' because it is traditionally cooked by boiling or steaming and is not heavily seasoned with spices". Fast food outlets such as Domino's in the capital city Aizawl shows the changing food culture with adoption of strongly flavoured food such as fast food and Indian Chinese



Inputs for Arunachal Pradesh, Manipur and Mizoram from Amar Gutta



## A GLOBAL Perspective

#### Charmaine O'Brien

An invitation to share my observations on emerging trends in India's foodscape for this edition of the Godrej Food Trends report was exciting. But how and where to start commenting on this dynamic multifarious smorgasbord? I decided to commence by describing some recent novel food experiences and then consider what these might reveal about the broader evolution of the country's contemporary eating habits.

Before I start though, I want to be clear that *nothing* about India's changing food can be attributed to any single factor!

#### Change on the Plate

Let's begin with my visit to Surat in January 2023. Breakfast was dhokla from a riverside street vendor and Gujarati thalis for lunch, essentially what you would expect to eat here. Evening meals were different: one dinner was beetroot hummus; a bright fresh tabouleh of quinoa, parsley, and pomegranate seeds; and a falafel salad. Another meal comprised a salad composed of crisp leaves, chicken, and nutty seeds enrobed in a faultless light mayonnaise dressing, along with a perfect thin-crust pizza topped with zucchini, ricotta cheese, roasted red capsicum, and fresh rocket leaves.

The menus in both dining establishments were entirely of Middle Eastern/Mediterranean/ western dishes and the decor was 'universal hipster'—muted colours, light wood furniture, and leafy green plants. I think of these types of eateries as 'could be anywhere' because the food and ambiance is so globalised that I often forget I am in India and could be in Sydney or London. There were a number of other eateries like this in my Surat locale.

Earlier, in December 2022, at the Binsar Wildlife Sanctuary in the Kumaon Himalayas the set menu at our lodge included a selection of regional dishes such as Sisunak saag (a side dish made of locally foraged stinging nettle), Gahat dal and sweet Lapse, which the guests, including me, eagerly tucked into. Having been a regular visitor to this region for two decades, I know the availability of local cuisine in tourist establishments here is a relatively recent phenomenon.

What then can these two singular experiences tell

us about India's changing foodscape?

The restrictions and fears arising from the COVID-19 pandemic led to proselytising that dining out and travel were done for and that the movement to preparing food from scratch at home would ever prevail: But they all seem to have been false prophecies. The Indian dining industry and diner are still settling down post COVID. Regardless, I see Indians returning to restaurants and travelling with renewed gusto, eager for new food experiences. I also conjecture the 'making it from scratch' trend in home kitchens has dissipated and more commercially prepared foods are being deployed. That said, the pandemic has wrought change and I think the experiences I have described offer evidence of that.

#### **Small Cities Will Become Gastronomy Destinations**

The pandemic created the opportunity for many people to exit India's sprawling megalopolises, relocate to smaller cities and work from home. It also exacerbated inflation of big-city real estate prices, limiting the possibility for less-resourced individuals to pursue ambition to open eateries there. One outcome of these circumstances has been the burgeoning of a cosmopolitan, contemporary food scene in smaller, perhaps unlikely, places such as Surat. The presence of the globalised eateries I found here highlighted to me that tier-2 cities with lower real estate costs and growing populations want to enjoy a sophisticated diversity of food offerings, which offers aspiring food entrepreneurs better prospects. *My forecast:* India's smaller cities will be where interesting things will happen with food in years to come and some will develop into gastronomic destinations for India's growing number of culinary explorers. Goa is already a vibrant example of this.

## **Discovering the Plurality of Indian Cuisine**

Until my first visit to India in 1995, I believed Indians ate a uniform cuisine of overly spiced, oily 'curries'. Arriving here and discovering that, in fact, they enjoyed an unparalleled plurality of cuisines, inspired me to research and write about India's regional cuisines in *The Penguin Food Guide to India.* In doing this, I was surprised to learn that many Indians had little knowledge of the food of

**Local-Global** 

The contemporary eateries I described in Surat are not original to this town; such places have been operating in India's megacities for some years now, all with menus tending towards global homogeneity largely a social media-inspired conformity. Indians also have

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## **About the Author:**

Charmaine O'Brien researches and writes about food history and culture. She is the author of several books about India's food including *The Penguin Food Guide to India* and the soon to be released *Eating the Present, Tasting the Future: Journeys in India's Contemporary food* (to be published by Penguin Random House in April 2023) in which she draws on 25 years of experience observing India's food and extensive interviews with Indian chefs, restaurateurs, food producers and writers to explore the factors driving the significant changes in the way many Indians are eating and what this might augur for the future.



communities other than their own and were often disinclined to try local foods when travelling.

My dining experiences in Kumaon showed me this has changed: Indians are becoming enthusiastic consumers of regional foods. The catalysers of this change are increased prosperity, improved travel infrastructure, and technologypowered media. Predicting growing local demand for foods and food experiences based on regional cuisines is obvious.

*My forecast:* I also believe that as Indians increasingly bring their diverse foods out from inside their homes - where these have traditionally resided - the opportunity to explore India's 'incredible' living culinary heritage will become a major drawcard for both local and international tourists.

access to an unprecedented variety of 'international' style foodstuff.

*My forecast:* What I see taking place in India is global culinary influences existing alongside traditional foodways and concurrently being absorbed

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into Indian food to emerge as new polyglot dishes and expanding of food habits. The food future here is looking phenomenal, provided packing waste, disparate access, food misinformation and robots don't get out of hand.

## DININGIN

## **KUCH CHATPATA HO JAAYE! - EXPLORING** THE INDIAN LOVE FOR SNACKS!

Wherever one goes in India today, one will find an appropriate snack for every season, reason, occasion, and time of day! Multiply this with the mosaic of culinary cultures offered in home kitchens, at dining establishments and on street stalls across the subcontinent, and it is no surprise that India's vibrant snacking culture is rich with as much plurality and diversity as every other aspect of its cuisine! This year, the Dining In section explores the evolution of iconic snacks of India.





#### Kebabs are said to have originated in Turkey, where soldiers grilled chunks of game meat skewered on swords over open fires. They were introduced to India by Afghan invaders and popularised by the Mughals, and according to Ibn Battuta, were found in royal Indian kitchens in as early as 1200 AD.



## SAMOSA

Often mistaken as an Indian snack, Samosa was introduced to India during the Delhi Sultanate,by cooks and traders from the Middle East and Central Asia, where accounts of Sanbosag and Samsa from Turkish and Persion cuisine can be found in as early as the 10th century.



#### Food historian K. T. Achaya believes the idli was adapted from the Indonesian kedli around 800-1200 CE, when it was ruled by Hindu Kings of Shailendra, Isyana, and Sanjaya dynasties. However, this is debated since the ancient texts of Karnataka, like Vaddaradhane of 920 CE and Manasollasa of 1130 CE mention similar dishes called iddalage and iddarika.

## CHOW MEIN-

Several Chinese workers migrated to erstwhile Calcutta - an important point in the thriving trade route from China and Britain in the 18th century. Many of these immigrants would cook and sell the food of their homeland, including Chow Mein, in the city, deftly adapting their dishes to suit the Indian palette.

## **PAV BHAJI**

Civil War! The war caused a spike in demand for cotton, and there were hungry traders at the Bombay Cotton Exchange. To feed them all, street food vendors collected the excess bread from Jesuit priests, concocted a spicy bhaji of assorted mashed vegetables, and thus this iconic snack was born!

## MOMOS

In China. momos mean steamed buns, but the momos we know and love come from Newari cuisine in Kathmandu, which Tibet when was introduced to a Nepalese princess married a Tibetan king. Momos came to India with Tibetan refugees in the 1960s, and are savoured across the country today.

## LITTI

Litti was first cooked in the kitchens of Magadh, an ancient



kingdom in Southern Bihar. Later, during the reigns of Tantia Tope and Rani Lakshmi Bai, it became an important wartime meal. The Mughals enjoyed litti with payas and shorbas, while the Britishers enjoyed it with curry, and today Litti Chokha is a staple in Bihar.

## VADA PAV

In 1966, Ashok Vaidya, a Marathi snack vendor in Mumbai, created the vada pav with the batata vada and ladi pav - two city staples - and the snack was an instant hit. When textile mills started closing in the 70s and 80s, many unemployed mill workers opened Vada Pav stalls of their own, thus establishing a new street food culture.

Pav Bhaji was invented as a result of the American





## **KUCH CHATPATA HO JAAYE!** - EXPLORING THE INDIAN LOVE FOR SNACKS

India has always loved its snacks. The rapidly evolving snacking segment has been reporting unprecedented growth in the wake of the pandemic, with projections suggesting a boom in the segment over the next decade. News that promises rich opportunities for various verticals - from the traditional, modern, and global categories to emerging health and diet-specific options. In a market populated by producers including home chefs, traditional snack makers, artisanal and newage snack brands in the FMCG segment, what will snacks mean to the consumer, as well as look and taste like, in 2023 and beyond?

## India, a Snacking Nation

With an ancient snacking culture that has evolved as a result of its unique geography, climate, and history, India has a vibrant segment of snack offerings with as much plurality and diversity as every other aspect of its cuisine.

The term 'snack' or 'snack food' is difficult to define. While its dictionary meaning is 'titbit', today, at a global level, snacking has come to mean a small meal in the broadest sense

#### **A Limitless Variety of Items**

In their historical context, Indian snacks were by nature food items that could be made in bulk, using techniques like drying and frying, which extended shelf life in a climate prone to microbial activity. With time, these roasted. fried, crunchy, crispy offerings came to be favoured as snacks that were easy to individually portion out or distribute at large community gatherings like temple meetings, festivals, weddings, and while traveling.

Over time, thanks to varied reasons, snacks came to be loosely categorised based on the occasions they were



was either a snack or a meal. Meals were meant to fuel your body; snacks

were what you enjoyed", says Krish Ashok. author of the book, Masala Lab, The Science but encompasses a universe of convenient, easy-to-handle, ready-to-eat, small-portioned, hot or cold, solid or liquid food products, intended to satisfy short-term hunger and offer a quick boost of energy. In India, the umbrella term for both snack time, as well as snacks. is nashta, also known as nasto, jol khabar, tiffin, and other local terms as one travels around the subcontinent. "Snacks are commas, while meals are full

of Indian Cooking. "And Indian

cuisine very neatly separates

outside, and generally snacks,

being deep fried lasted longer

and could be carried, gifted.

and crossed home and caste

distinction between food at

home and food outside is one

In fact, it could safely be said

that India's snack repertoire is

commensurate with the regions,

micro-regions, and communities

that make up the culinary fabric

cuisine is rich with a plethora of

snacks for every reason, season

and occasion, from dry mixtures

to hot, freshly cooked offerings.

Namkeens included dry roasted

or fried products. "Things like

chivda, chana, moongphali are

found in many avatars across

of the sub-continent. Indian

of the reasons India has such an

insanely rich, snack ecosystem",

boundaries. The massive

he concludes.

what you eat at home, and



habits changed, we have successfully incorporated these commas into sentences of food", observes Rocky Singh,

food enthusiast, author, and anchor of popular shows like *#roadtrippinwithRocky* 



the subcontinent even today. Lowcost, hassle-free. and nourishing.

these were the quintessential fast food that sustained travellers on long journeys", explains *academic, food critic* and historian, Dr. Pushpesh Pant. While the not-so-affluent settled for these, more affluent trader communities took snackmaking to an elevated level, with everything from wafers, chips, and single-ingredient products like sev, bhujia, and gathiya, to elaborate spiced mixtures and namkeens like chivda, chakna, or chavanu made up of nuts, seeds, savouries, and more.

Next came the more complex category of snacks categorised as pakwan, such as matthis, chakli, murrukku, and more. "Traditionally, pakwans were well-cooked, deep-fried foods that had a really long shelf life

and were considered free from pollution. The whole idea of these home-made savouries was to continue enioving the delicacies long after the festival had passed, and preparing them was a yearly opportunity to pass on recipes to the next generation", reminisces Dr. Pant, adding that similar offerings were available across India, with ingredients changing. "I grew up in a family that seemed to have one religious festival a month, and every one of these had a set of homemade deepfried or other snacks! Although, nowadays, they are often bought from outside", adds Ashok.

Over time, many of these traditional offerings that were the premise of the home kitchen, laboriously shaped, cooked, and fried by hand, became the forte of specialist

## The Evolving Concept of Snacks

Snack time can be any time between main meals. But with lifestyles evolving over the last century, the definition of snack time and snacking patterns are also evolving. Snack time today has grown from a pause for sustenance into a break from routine for indulgence. entertainment, and social and emotional gratification.

Mealtimes evolved with cooking over time as a planned activity for small family and community groups to optimise resources, energy, and the time of those preparing food. Traditional meal configurations in India were limited. Mealtimes like breakfast, lunch, and dinner are a modern social construct that India only adapted in the last century. "In India, we had two important



meals of the day and in between, if you got a little hungry, then you would have dry snacks, for example in

Maharashtra, it could be doodhpoha" observes food historian Dr. Mohsina Mukadam. "Snacks, as we know them today, did not traditionally exist. In fact there is no mention of snacks as a

category in old Sanskrit, Persian, or Urdu cookbook manuscripts". She explains that while there are distinct sections for breakfast, main course and other meal segments, snacks are included in the festive recipe sections, but not separately categorised. According to Dr. Mukadam, two significant factors catalysed changes in the attitude toward snacks. The advent of modernisation, for one, drove change, especially

in the cities. "People began working in offices, going to school, and travelling to work. Varying timings led to a need for snacks to satisfy what we call small hunger, or choti bhook mitana", she observes, a change that is reflected in cookbooks published in the 90s and 2000s. "Marathi cookbooks began to mention madhlya veleche khane or snacks between meals, and dining establishments and street food culture began to flourish in Mumbai".

halwais and farsan wallas. showcasing special expertise with recipes, spices, and craftsmanship. "Nimki, namak pare, and miniature samosas stuffed with lentil paste could be relished whenever pangs of hunger cried out", recalls Dr. Pant; "sadly, the readymade stuff from stores pale in comparison to what mothers made at home".

Somewhere along the way. street food also crossed over into the snacking segment. "Over the years, snacks became entertainment. And because street foods offer the ultimate food entertainment, they quickly grabbed a share of the snack category with the 'wow' factor and showbiz they offer", observes Singh, adding that entertainment today has grown beyond TV or a movie at the mall, to include a street

The other factor that changed consumption patterns was women joining the workforce, and advances in packaging.

food excursion with the family at which making a meal of a few snacks is a much loved break from the daily routine. And street food vendors by that measure have become the ultimate food entertainers. "When I started doing my show Highway On My Plate, I remember visiting Sarafa Bazar in Indore where Joshi Dahivadawala was known for his magical act of tossing dahi vadas 20 feet into the air, catching them and using sleight of hand to create sensations with different masalas"!



"People didn't have time to make everything at home. so they began to get it done from the cooks and women's groups. The other thing that changed things was the concept of packaging, "Advances in packaging technology were a major development that extended shelf life, and somewhere, thanks to machines and the promise of the food being untouched by hand, the trust factor began to shift to big brands. This is something that re-emerged as important post COVID-19".

Ashok observes that, while perceptions around snacks have evolved with generations, the distinction between homemade and purchased is still prevalent. "For my grandmother's generation, outside food was simply not acceptable, because caste (of those making the food) played a big factor. For my mother's generation, it became about the oiliness and the health factor. For our generation, it pivoted into unhealthy and processed food, versus healthy and unprocessed food".

#### **The Enduring Allure of Snacking**

By nature, Indian food is designed to deliver stimulus to all 5 senses: sight, sound, smell, touch and taste. And Indian snacks top the hierarchy for maximum sensory satisfaction. "Indian snacks have been the perfect calorie delivery vehicle for the larger population of essentially working class people throughout history", explains Ashok; "Snacks had to be high in carbs for energy, as well as high in fat, often deep fried, to minimise moisture content. And the high cooking temperatures meant flavourings needed to be really strong and incorporated into the snacks. All of which made snacks crisp on the outside, flavour bombs on the inside, and something we are hardwired to gravitate to".

According to Singh, this ensured snacks were always viewed as momentary indulgences. "In India, snacks are perceived as guilt-free compared to full meals. Because they are geared for a smaller intake of food, not in terms of caloric value but portion size". He goes on to observe that typical Indian meals signify the end of the line that, once consumed, means a big nap. "Snacking, however, offers smaller bursts of food. And are easy to consume, needing little else. "Even ready to-eat meals need condiments, or accompaniments, but snacks, stand alone, and burst with flavour! Just open, pop in, and you're done"!

The gratification that foods rich in oil, fat, and high spice offer have come to be the ultimate hook that has driven the evolution of snacking culture down the ages. The next big pivot took place during the pandemic and sent off seismic shifts in consumer snacking patterns, preferences, and choices. The entertainment proposition snacks offer have made them a favourite way to connect with family, and community, a practice that became a 'lifeline' for many, especially parents who juggled work-from-home and kids' schedules, during the pandemic. Taking time out for a snack, provided convenient, welcome avenues for connection on dismal busy lockdown days. And in the wake of the pandemic, this reshaping of rituals and routines, means that snacking

not only provides connection but also individual gratification. Consumers today are also seeking out snacks not only as sources of sustenance, satiety, and connection, but also as a means of physical, emotional, and mental well-being.

The Indian consumer has had the time to reassess food choices - specifically what snacking looks like and what it means to them in the everchanging context of their lives. This has made what constitutes a snack, limitless and snacking as a category extremely fluid! There is no 'one snack fits all' answer anymore; everything is up for grabs, be it traditional offerings, ever-growing new propositions, healthy or diet specific snacks, or beverages and desserts, crossing over into the snack category.



The Flavourful Future of Snacking

India's demographic profile is changing fast and dramatically. Taboos and rules are less prevalent, and the fruits of liberalisation are visible everywhere. Easy availability, increased disposable incomes, and an intrepid need for excitement from jaded palates are all driving rapid growth and innovation across verticals in the snack category.

The Indian consumer is hungry for adventure on the palate. Snacks with their myriad flavour propositions offer instant gratification that is convenient, versatile and insatiable. Take for instance the recent popularity of Ramen. *"Instant Ramen noodles have become almost as popular* and diverse as the massive variety of chips we have in



of K-Pop and K-Dramas, but

hacks around 'pimping up your

ramen' that are flooding social

media show where consumer

willingness to experiment with

global cuisines is headed"! This

growing consumer interest

in exploring new flavours will

drive the industry to innovate

and explore traditional snacks,

regional Indian flavour options,

snacks are popular with certain

as well as global offerings.

While packaged and instant

demographics, many consumers today, who are more aware of what their bodies need, are turning to mindful snacking habits **"Snack time is an** 



ss "Snack time is an opportunity to nourish your body; hence, one needs to

be clever about choosing the right options", points out nutritionist, Amita Gadre. "I recommend snacking only when truly hungry and insist that the snack, even if it's small, is mindful - with one fully present and eating without any distractions". She goes on to share that options that provide a combination of protein and healthy fat are preferable to those that are just plain carbs. "Nuts, makhana, clean protein bars, dry fruit or ragi laddoos are better than khakhras. They keep one full for longer, prevent cravings and help control blood glucose spikes". She adds that desi snacks like chikki, chivda, thepla, muthiya, dhokla, podi-idli, and dosa-chutney, also make perfect options, cautioning that consumers must "beware of the type of fat and fat content of store-bought options that are often full of saturated and sometimes trans fats".

No wonder that snacks with good quality, better-for-you ingredients, controlled portion sizes and even individual preferences are in demand. According to *Megha Phull of Zealo foods, "Personalised* 



adding protein powder to make laddus into energy balls; gluten-free and vegan options; more or less spicy; specific requests to add flax seed, goji berries, or protein powder are some things we are happy to cater to".

Snacks that offer last-mile cooking are also finding traction with busy professionals and families with kids. "Standing in the kitchen and cooking even a dal-rice meal that may

## Focus Areas for the Snacking Segment

The snack segment is clearly set to explode! The Indian consumer is hungry for new flavours and adventures on the plate. Meal constructs are changing. Snacks offer a convenient, versatile proposition for any occasion or time of day, as well as any flavour craving. The already dynamic snacking segment should leverage this opportunity by investing resources and energies in specific areas. The industry will witness targeted innovation and evolution in infrastructure enhancement, R&D and skill augmentation.

Action Points - Indians will enthusiastically embrace any and all snacking propositions in 2023 and eagerly explore both global and regional Indian flavours. *Flavour, texture, and satiation* will be paramount, but snacks that combine these with *health and convenience* will attract customers looking to eat mindfully. A growing consumer interest in exploring *new flavours* will drive explorations into *traditional snacks, regional options, as well as global offerings*. Players in the snack segment of the industry can leverage this excitement by investing resources and energies in specific areas such as R&D into *non-fried* and *nutritionally-fortified snack solutions inspired by* regional and global flavours, and *natural flavour alternatives* sans preservatives and additives. The focus on health and mindfulness will drive parallel demand in the *alternative diet-based category*, nutritionally-fortified snacks using good-for-you ingredients like *millets*, as well as *vegan, plant-based* offerings. The magnetism of *food with storytelling* is something that goes hand in hand with snacking, and verticals across the industry can take advantage of this in *planning menus*, *concepts*, *and products* as well as *content for socials*.

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take at least 20-25 minutes. has become less desirable compared to opening a packet of kebabs or cutlets and frying them up, which will be quicker and tastier", observes Singh, going on to add that the perceived control these ready-to-eat snacks allow is an added draw. "Control has a lot to do with food habits these days - the addition of a salad or vegetable condiment, bread or rice, or an egg for protein in noodles the completes meal. These ready options take the effort out but allow improvement of a meal with high satisfaction".

Individual preference and choice are also extending beyond snacks themselves to the brands that make them. Many consumers today are consciously prioritising brands that place people and the planet at par with profit. Products that echo shared purpose, by reflecting provenance, transparency of the journey in terms of local, responsibly sourced, and support of farmer and producer communities are resonating and motivating purchases. According to Phull, "Trust and transparency are verv much in demand. One reason home chefs have really

grabbed a large market share is that they are trusted brands that deliver what they promise. And trust, especially in terms of ingredient sourcing, and what brands offer, is a huge factor". By the same philosophy, sustainable packaging, onpack education, and postconsumption environmental impact are also important issues to this category of consumer.

Palates are evolving, consumers are becoming more aware, and the industry is innovating in unprecedented ways. But one thing is clear: The consumers' relationship with their snacks will only get deeper, more meaningful, and specific. This means that India, which has the largest universe of snack offerings, even without industrial processing and packaging, will lead the global snacking galaxy into a golden age, with aisles full of opportunity waiting to be filled!



## **DINING IN TRENDS**

Consumers across India have emerged from the pandemic with a deeper understanding of food and how their dining choices impact both their individual health and the environment at large. 2022 began on a cautious note, but as the shadow of the pandemic receded by the second half of the year, it allowed space for festive fervour and much-welcome positivity. Looking forward to 2023, work-life balance will continue to impact in-home consumption. Learnings around the positive impact of home cooking and traditional diets will fuel consumer demand for offerings that tick off the boxes of health, hygiene, safety, taste, and convenience.

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Read on to see our expert panel's predictions on how consumers eat and cook at home in 2023.

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## **Toolkit For 2023**

Consumers are going to be as experimental at home as they will be when dining out in 2023. The quest for novelty will inspire *exploration of cuisines other than one's own* in consumers, who will continue to display their cooking skills on social media. Creators should consider creating posts and reels showcasing hacks around *homemade, authentic, from-scratch masalas* and condiments over readymade shortcuts. *Traditional cookware and techniques* will also be appealing. For the food media segment, *regional, local and seasonal* continue to offer much opportunity for exploration, and articles around the ergonomics of traditional cookware, regional ingredients, and global cuisine experiments will all be very well received. *Snacks will be a very popular content topic,* with so many possibilities from healthy recipes to exploring GI snacks, mapping local snacks when traveling, and so much more, as will recipes that *cross ingredients and cuisines* intelligently.



#### **Section At a Glance**

2023 will bring consumers limitless offerings across varied segments of the industry to meet every requirement. That said, consumers of 2023 are evolving. The hunger for new flavours and exciting experiences is going to drive choices, but at home this will be tempered with mindful consumption, specific expectations, and cautious budgeting, although festive and celebratory occasions will see indulgence.

Dining practices in-home have definitely changed. Convenience cooking has shown a steady rise in adaptability and respectability over the last few years. And in 2023, convenience will be the theme across the board, be it when ordering in from trusted sources, opting for clean and convenient cooking solutions, or outsourcing daily meals to meal subscriptions. The interest in exploring food will prevail, and regional cuisines will continue to be of interest, but the quest for flavour will also inspire exploration of global flavours and extend to exploring culinary roots more than ever before. The focus on clean eating and mindfulness will make locally-produced artisanal products attractive, while health concerns will drive investment in diet-friendly kitchen equipment and tools

## ALTERNATIVES TO HOME-COOKED MEALS

In 2023, many habits formed post pandemic prevail. The hybrid work formats, awareness of the positive impact of home cooking and traditional diets and work-life balance all have the consumer looking for options that deliver health, hygiene, taste and convenience above all. Convenience cooking has clearly been embraced wholeheartedly over the last few years. And there is industry-wide innovation underway to provide solutions for ready-to-cook, ready-to-eat and everything in between to support this demand.

More than three-fourths of our panel has observed a marked rise in consumers opting for **homedelivered solutions** from trusted sources like home chefs and cloud kitchens across the country. More than fifty percent forecast that consumers will also seek convenience when cooking at home with clean, preservative-free, speed scratch **convenient cooking solutions**, such as ready-to-fry frozen snacks, ready-to-cook spice pastes, and more. The theme of convenience also extends to long-term solutions for **meal subscriptions from trusted sources** allowing consumers to circumvent time challenges that come with shopping, cooking, and eating at home.



The food game has already started changing, and home chefs are leading the way! One downside I see is the quality of the packaging being used· But this will lead to opportunities for entrepreneurs to innovate in the sustainable packaging segment·

The popularity of ready-to-cook products tells us that packaged food is here to stay. The industry could consider newer options that can incorporate ingredients now perceived as 'healthy' such as millets in convenience options like multigrain pancakes or cake mixes, etc.



Arun

Forced inactivity and emotional eating during the pandemic caused weight gain and lifestyle diseases. With offices fully functional, people who had gotten used to homely food are now looking for convenient preservative-free, transfat free, ready-to-cook options to make a quick meal at home.

Indians generally like their home cooked comfort meals more than anything else. With the younger generation working longer hours away from home, the need for convenient cooking solutions such as the MTR batter mixes, pre-cut vegetables, ready spice mixes, sauces and curry bases, with precise proportions can make home cooked meals easier and save tons of time and effort.





Soumitra Velkar



Swetak Abhisek Mohapatra



Home-delivered trustworthy meal solutions



Preservative-free, convenient cooking solutions



Meal subscriptions from trusted sources



Fortified convenient meal options



Two years of introspection and culinary exploration during the lockdown have fundamentally altered food consumption patterns at home. Consumers are choosing to engage with food mindfully, with a focus on health, conscientiousness about their food heritage, and mindfulness toward the environment.

With the pandemic having deeply catalysed the yearning for connection, consumers will focus more on the foods of their childhood through *exploration of their culinary roots*, by delving into the culinary heritage of their family, community, and regional cuisines. At the same time, a yearning for adventure will drive them to explore cuisines other than their own. The panel also foresees consumers gravitating to homemade, authentic, from-scratch masalas, and condiments over shortcuts.



Deeper exploration of culinary roots



Exploration of cuisines other than one's own



Homemade, authentic from-scratch products



Revival of heirloom dishes and cooking techniques



We have noticed several consumers accepting and encouraging the use of traditional cookware in their kitchens to utilise the health benefits associated with them, along with the flavour

Agrawal

With 2023 slated to be a year of turmoil and possible recession, comfort food will be on top of everyone's mind. 'DIY' masala kits, reusable packaging, traditional ingredients and products that have a general feel-good factor without being too aspirational will appeal to most folks.





Eating at home is becoming an industry on its own, and I think business innovation is just round-the-corner to help make it sustainable. Pide, Khachapuri and Boreks are adding to the pizza pile. Napoli and Romano-style pizzas with bocconcini and Parmigiano Reggiano are everywhere!

I never really understood Geography when I was in school, but today, food brings it alive for me! India has a diverse culinary culture, and I see a lot of us chefs being inspired by local ingredients from our travels, exploring our culinary heritage for inspiration and presenting it with our own twists at home and when we feed quests professionally. As long as you know the path you want to take with a dish, the lines are thin an Indrayani rice can easily be substituted for a Japanese sticky rice.



Vaswani

# **FOOD CATEGORIES** IN FOCUS

Today's consumers are the most hands-on and well-informed. Their food priorities for the near future are set - be it health and nutrition, novelty and flavour, or social and environmental conscientiousness. The choices they make with food categories when cooking and eating at home in 2023 will reflect this.

In 2023, our panel sees a significant focus on *locally-produced artisanal products* such as cheese, pickles, kimchi, dips and preserves to augment meals with flavour and textures, with health being a priority, *freshly processed foods*, whether it is freshly milled flour, batters, or freshly made snacks. This will also drive awareness and demand for lesser-known local and hyper-regional ingredients to experiment with. The awareness that there are so many local ingredients to be explored across India will drive interest in trying *geographical indication foods*.



The pandemic played its role in our awareness towards local, and hyperlocal ingredients as well as trade skills. We must focus on stories that have to be told. Of our food producers and artisans, like in the case of Bandel cheese, which some families in Bandel restarted producing with government support in recent years. It shows how, with collective effort, we can keep heirloom products and their trade skills alive.

Seeing the response to Ishka Farms foray into this segment and the support for local, farmbased , small-batch clean-label offerings has been amazing and surprising. Making quality local produce available for what's today only imported, e.g. Olive Oil by paying attention to shifts in trends it the need of the hour  $\cdot$  It also makes them accessible by reducing prices for consumers. \_\_\_\_\_

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People are more conscious about consuming quality produce and food today. Consumers appreciate us for helping them cook wholesome meals at home with minimum effort. The feeling of feeding your family quality food is an inexplicable emotion. This is testimony to the rise of artisanal brands country-wide.

The pandemic saw consumers making several masalas. flours and even pasta at home. This elevated cooking and preserved the freshness and flavour of the ingredients. There is also more consideration towards local producers and regional foods. All of this has translated into keener interest in indigenous products.









Locally produced artisanal products



Freshly processed food





## KITCHEN APPLIANCES/TOOL

With health and convenience being two driving factors in home kitchens today, the appliances and kitchen tools that aid in preparing and cooking also matter. A keen awareness of what they want to eat, the health quotient of their meals and the home cooks' and bakers' burgeoning interest in local and global cuisines will directly impact in-home purchases of kitchen appliances and tools.

With health taking precedence, it is no wonder that our panel predicts that *diet and health-enhancing* gadgets like steamers and air-fryers will be in demand in 2023. The interest in regional and traditional foods will find consumers opting for *traditional Indian cookware* made from terracotta, stone and brass. The same need to connect to our culinary heritage and new found pride in kitchen and dining spaces will find *kitchen tools that marry modern design with traditional materials and techniques* popular with consumers in 2023.



Diet and healthenhancing gadgets



Convenient cooking gadgets



Traditional Indian cookware



Gadgets with modern design and traditional techniques



Amita Gadre

The value of traditional cookware is now slowly being understood and traditional kitchenware is being used more freely in Indian kitchens. It is no longer a cookware that is used once every year when festivals come around.

conscious' approach.



Joshi Medhora



Indian cookware does not release toxic trace elements into the food and preserves food nutrients. Cast iron utensils, for instance, boost the iron content of food, particularly in acidic foods; copper promotes collagen in the diet; and brass helps improve immunity.

The pandemic has put personal health under

how they need to 'do' something to ensure

optimal health, and diet is the first line of

preventive health. We are now seeing a shift

from 'convenience' to 'convenience with a health

the microscope. Everyone is hyper-aware about

There are two forces at work - a return to tradition and an increased awareness of health, which can work in tandem. People recognize that traditional methods and tools can provide health benefits. There is also an awareness about modern gadgets producing nutritious and delicious food.



## SNACKS/ **CONVENIENCE FOODS**

In the aftermath of the pandemic, consumer behaviour has evolved. With hybrid work models and changing meal constructs, the convenience and flexibility that snacks and allied convenience foods offer have made them an important part of grocery shopping and kitchen shelves.

Whether as convenient small meals, personalised meal replacement options, sources of comfort or indulgence, snacks are becoming a go-to option for everyone. But health is clearly going to be a primary decision driver with snacking. More than half of our panel forecasts non-fried snacks like baked, roasted, popped and puffed options will be front runners, offering crunchy satisfaction without the perceived calories of frying. The next two top trends are almost at par for our panel of experts. Nutritionally-fortified snack solutions like millet granola, makhana chivda, hemp chutneys and more that marry health and taste will be popular, as will traditional snacks made by home chefs like chakli, bhakarwadi and sev.



traditional but healthy snacks.

At Zealo, we deliver high-quality, healthier snacks and sweets to our clients. We see a steadily growing demand for better-for-you daily snack options. There will also be more awareness of and scrutiny around the use of natural, nutritious, high-quality ingredients, and avoiding artificial sugar and flavours.



Post COVID, well-being has become nonnegotiable, and the world is moving towards health in a greater way. We are a country that loves fried food and will still have the vada pav and samosa, but people are turning towards more healthy options like nuts and non-fried options.

Dieticians and fitness experts have gained popularity amongst a segment of the Englishspeaking social media audience. Healthy cooking gadgets and apps are a tangible way of seeing results. Their spread beyond the early adopters depends on whether modern-day health gurus can broaden their audience and percolate into the vernacular segments.



Home chefs and snacking companies are coming up with a whole new range of interesting snacks that are air fried and baked. You'll see lots of millet snacks in the International Year of the Millet. It's going to be a fabulous mix of



Megha Phull



Kalvan Karmakar



Non-fried snack options



Nutritionally-fortified snack solutions



Traditional snacks from home chefs

## FOOD INDUSTRY

## TASTE THE WORLD WITH A FINGER TAP!

Global to hyper-local, burgers to ramen, biryani to momos — whatever the desire, a world of flavours is a finger tap away for the Indian diner of 2023. The concept of cloud kitchens was already gathering momentum pre-pandemic and reached a crescendo during the lockdown. With the economies and streamlining they allow, cloud kitchens in India are serving up a feast! This year, the dining out section explores the evolution of this developing sector and where it is headed in 2023 and beyond.







## TASTE THE WORLD WITH A FINGER TAP!

Imagine snuggling into a warm quilt in chilly Delhi winters slurping a hot bowl of Ramen straight from the kitchen of a favourite chef. partaking of a Kashmiri Wazwan in the comfort of a Mumbai home, serving up Sindhi Dal Pakwan to party quests in Bengaluru, or indulging in steaming hot momos during a meeting in Gurugram. All of this may have been a fantasy until a few years ago, but today, thanks to cloud kitchens, every desire a diner may have – from craving the simplest khichdi to indulging in the most elaborate gourmet meal – can be satisfied with the tap of a finger!

It is hard to pinpoint exactly when cloud kitchens started in India – was it with the launch of Dominos' delivery-only model in the late 1990s? Or much earlier, in the 1890s, with the legendary dabbawalas of Mumbai, who have been delivering food to the workforce of Maximum City for over a century? Or would it be the most recent few years when appbased food delivery models became so popular that an entire industry developed around them?

## The Advent of Cloud Kitchens in India

Cloud kitchen, ghost kitchen, dark kitchen, or delivery kitchen - these terms were alien to the Indian diner until a few years ago. Today, not only are they a part of everyday vocabulary, but the concept has also become intrinsic to daily lives. By definition, a cloud or ghost kitchen is a commercial space from where delivery-only brands operate. These brands do not offer consumer-facing dining or entertainment spaces and exist exclusively for food production and delivery.

"Food delivery may have existed earlier, but it really picked up in the early 2000s with the IT and ITES boom when cities like Gurugram. Noida, Mumbai, Bengaluru, and Hyderabad suddenly acquired a significant population of voung professionals, most of whom worked odd hours when restaurants would have been inaccessible, and home delivery was the only solution", observes chef *Vikramiit Rov* who runs multiple brands from his cloud kitchen in Gurugram.

Amongst the first to venture into gourmet offerings from a cloud kitchen with his Asian brand *Hello Panda,* Roy adds,

"Delivery outlets, at the time, were not strictly serviced by cloud kitchens; the food came from kitchens that

were an extension to a retail space, if not a full-fledged *restaurant"* — a practice that opened up a brand new market. Food entrepreneurs, who until then, had to wait for customers to come to them, could now take their food to the customer's doorstep. Since everything the a-la-carte menu offered was not delivery-friendly, a separate menu of offerings began to evolve. Brands offering biryani, rolls, masala rice, chow mein, idli-sambar, pizza, sandwiches and burgers – some of the easiest things to deliver, serve, and eat – mushroomed and became go-to options for those needing quick and hot food at home.

It was only in the early 2010s when smartphones and food

The Entry of Aggregators and Tech Enablement

While early apps and portals like FreshMenu, TastyKhana and DeliveryChef were the first

movers connecting the end consumer with delivery kitchens, it was the entry of the two big

market players. Zomato and Swiggy, that revolutionised the market forever.

that true-blue delivery kitchens grew into a category of their own. Some were hardcore commercial kitchens helmed by professional chefs as side businesses, while others were home kitchens from which homemakers – popularly called 'home chefs' – operated with limited budgets. Together they presented a large variety of offerings from homemade meals to high-end salads, curries, pasta, and noodles to a niche category of consumers. By 2013-2014, an entire fleet of home chefs and commercial kitchens were catering to a brand new segment of discerning customers.

apps started becoming popular



Investing heavily into cuttingedge technology, algorithmdriven ratings, discount and membership benefits, these businesses brought new benchmarks to the segment. The consumer, who had already progressed from ordering via the phone to websites and then apps, was only too happy with this new option. "In Mumbai,



the cloud kitchen trend began with Faasos. They delivered fresh, hot,

and filling food to your doorstep, Box8, Moio Pizza, and Goila Butter Chicken took the concept further", says Nachiket Shetye of Kychens, whose setup services multiple brands of cloud kitchens in Mumbai by providing basic infrastructure and trained chefs to run their operations minus the hassle of setting up a kitchen.

Delivery kitchens also benefitted from aggregator apps. Where

## **Ease of Business and Low-Cost Models**

Traditional F&B businesses are cost- and time-intensive, so setting up a restaurant, cafe. or even a small grab-and-go kiosk translates into fairly large investments and significant risk. A cloud kitchen, in comparison, is cheaper, quicker, and lower risk. No wonder then that the arrival of delivery aggregator apps drove delivery kitchens to open up all over the country and continue to do so – especially entrepreneur-driven brands that want to test the waters before entering the food space.



Lockdown and Pandemic-Driven Kitchens

The pandemic brought everything to a standstill, and lockdowns compelled all food businesses to down their shutters. The silver lining in this unfortunate period was that it catapulted the delivery kitchen segment to unprecedented heights.

"When my team was out of work during the lockdown and l had to get them back to work.



once they would have had to invest significant time, energy, and resources into identifying target audiences, marketing themselves and hiring riders to deliver their food, the aggregators now did all of it for them. In fact, these kitchens tapped into a very lucrative arrangement. They expanded their footprint, got deeper penetration, got access to a larger pool of riders to take care of delivery, and acquired technology to enable entire end-to-end processes

"Aggregators continue to be a great asset to the cloud kitchen space. No one can match the technology and resources they offer – connecting the customer to the kitchen, tracking the rider and the order till it reaches you, ensuring timely arrival and departure of food — which play an intrinsic role in the evolution of the delivery model", points out

"When I was setting up my food businesses, I realised that getting into the full-fledged restaurant space

needed a large capital, a lot of time, and it was a high-risk proposition. A delivery kitchen, however, was much cheaper and less time-consuming", shares Jitin Mittal, who set up a premium delivery-only kitchen, Orient Heritage in 2019, a time when most delivery kitchens offered an average fare of passable quality. "As

a cloud kitchen seemed the most practical and economical option

despite low margins. We rented a small space for the kitchen, and my partner and I did everything from setting up the equipment, to cooking to packing and even delivering the food", reminisces Chef Harangad Singh, who set up

Shetye. By 2018, a steadily growing segment of customers preferred to order in over dining out. "Brands like Goila Butter Chicken, Box8, and Mojo Pizza were amongst the largest players at the time and worked purely on the cloud kitchen model with multiple kitchens across the city", concludes Shetye.

Bengaluru, Hyderabad, and Gurugram were other cities that saw a similar trajectory of cloud kitchens. By 2019, cloud kitchens had truly arrived on the Indian dining scene, and familiar brands started showing up across cities, too.



a concept, delivery kitchens had only started to take shape in Delhi so the segment had a huge scope to grow. We offered 5-star quality fare at the price of a delivery kitchen, something Delhi had not seen until then". While Mittal did not make money in the first year, his business flourished with his kitchen coming in second highest in South Delhi on Zomato in terms of numbers within a year of starting.

Parat, a luxe Indian delivery kitchen in Gurugram, in the midst of the pandemic. He was not alone. Chefs, entrepreneurs, and food business owners were forced to find alternatives to survive, and cloud kitchens offered the most practical solution. When restrictions eased, delivery kitchens sprang up in low rental areas: equipment was brought in,

commissary chefs were hired, and new brands came into existence within days. It was from kitchens like these that some of the biggest names in the industry operated for months during the lockdown!

But it was not all easy, as Singh learned. While he had mastered the most complicated recipes and cuisines during his stint at the Taj, he had to start afresh with Parat. "There are many challenges with the delivery model when it comes to how texture, taste, and flavours change when food travels. We had to tone down our menu, unlearn a lot of things, and learn everything all over again", he reminisces. Similar stories played out across the country.

With the worst behind them, these small kitchens emerged primed to offer up a plethora of new cuisines to the consumer who had developed a newfound fondness and respect for them. "The cloud kitchen space underwent a complete overhaul during the pandemic. The so-called ghost kitchens became alive and visible, and quality, hygiene. and operational processes changed for the better". asserts Roy. Brands wanted guests to have a complete restaurantstyle dining experience in the comfort of their homes. Menus that up until now were limited

to convenience food, expanded their repertoires to offer sushi and sashimi, pork chops and lamb shanks, khao suey and dim sum, burgers and ramen, and so much more!

While commercial cloud kitchens upped their game and offered the world on a plate, home chef-driven kitchens also evolved into a dynamic segment catering to a variety of consumers, including patients affected by the pandemic. people separated from families and craving home-style food and variety at reasonable prices. From homemade snacks and mithai to handmade breads and bakes; from hyperlocal dishes like Assamese pork with fiddlehead fern to regional classics like Rajasthani Dal Baati: from single offerings like Ramen and gourmet burgers to international cuisines ranging from Thai, Italian and Chinese, to Sri Lankan, and Korean — a world of flavour was on offer at the tap of a finger, with home chefs happy to dish it all up!

Social media and WhatsApp became platforms to interact with customers and cater to their individual preferences, requirements, needs, and tastes. Delivery apps helped transport the orders, and a parallel ecosystem of affordable, wholesome yet unique food delivery emerged. Like in the case of Mumbai-based home chef *Jasleen Marwah.* 



loved the food so much that there was no looking back", she shares. Marwah, who had been doing Kashmiri pop-ups before the pandemic, decided to start selling her food from her home kitchen during the lockdown. "My aim was to cook good food and make some money because all my other work had stopped. The response was so amazing that I have continued to run the home kitchen and now also cater to small gatherings, family functions, and cook special recipes on demand", she shares with a content smile. While Marwah specialises in Kashmiri cuisine, similar stories of home chefs serving up a variety of other regional cuisines such as Bihari, Marwari, Assamese, Kerala, and even Bohri and North East Indian food showed that the consumer was eager for new flavours. These home chefs acquired a loyal following and continue to do well.



#### **Post Pandemic - New Offerings and Evolving Consumption Patterns**

If the pandemic opened up new avenues for cloud kitchens, 2022 brought change in its wake. As the industry began to open up, consumers took to dining out with a vengeance, and restaurants began running at full capacity! Consequently, delivery kitchens saw a drop in sales. "November 2022 was the worst month for business. People were travelling, there were weddings and festivals, so the focus on ordering in was much lesser", shares Roy. Mittal, who has since shut his first venture and now mentors cloud kitchen startups, agrees,

"Most restaurateurs who started niche kitchens have gone back to their restaurants; the focus on delivery is minimal unless you run a delivery-only brand".

Contrary to what this may suggest, the niche delivery market is neither dead nor going anywhere. A large segment of consumers has become comfortable with ordering in and indulging at home and remains loyal to brands. According to market data, too, the segment, despite an erratic journey, continues to see growth and investment. According to IBEF (Indian Brand Equity Foundation), the domestic cloud kitchens market is projected to increase to US\$ 1.05 billion by the end of 2023 and further to US\$2 billion in 2024.

According to Shetye, "Cloud kitchen consumers today want quality food but at small prices, which is why rolls, shawarmas, biryani, pizza, and burgers are back to being crowd pullers. They are filling, cheap and work for the masses. The cart price remains very small (between Rs. 150-300), and there is hardly any money to make unless you sell huge quantities". These single-item menus, however, also mean that brands can efficiently manage with limited inventory, and multiple brands can operate from a single kitchen space, a model Shetye's company is now successfully running across Mumbai. His outlets service up to six brands – from high-end ramen and

#### The Way Forward

The Godrej Food Trends survey panel as well as industry watchers predict the cloud kitchen space will continue to evolve with increasing investments.

While they may have started as a subset of cloud kitchens, home kitchens are surely and steadily growing into their own segment, too. "Home kitchens continue to do well atleast in Mumbai", observes Marwah, who has seen a steady growth in her customer base and demand for her food. Home kitchens, in her opinion, earn a lot more trust and respect. "Customers don't even ask me for prices when they order; they are sure of great quality and genuine

The cloud kitchen space. meanwhile, continues to evolve with increasing investments and more players entering the segment thereby creating healthy competition and spoiling the consumer with the choicest of offerings. "The only way to survive is to tighten your cost and operation", asserts Roy. Using common kitchen space to service multiple brands, working with aggregators to leverage their infrastructure and resources, and constant reviewing of offerings is what will keep the kitchens going in the long run". Mittal concurs, "The only way to thrive, not

## Focus Areas for the Cloud Kitchen Segment

The Indian consumer is hungry for new flavours and adventures on the plate and will enthusiastically explore regional Indian and global flavours. The cloud kitchen segment should leverage this greatly by investing resources and energies in specific areas. The industry will witness calculated innovation and evolution in infrastructure enhancement and skill augmentation, which will benefit ancillary industries.

Action Points - To be noted, however, is growing consumer interest in exploring *new cuisines*, such as that of *the North East of India* and *Vietnam*. The industry should take note of the increased demand for *knowledge and skill enhancement* to understand regional and global cuisines and convert them into viable propositions. The magnetism of *food with storytelling* is something cloud kitchens can take advantage of in planning menus and concepts with *investment in R&D and innovation*. The focus on health and mindfulness will also drive parallel demand in the *alternative diet-based category* that compact operations formats of cloud kitchens can meet for *vegan, plant-based, and health-boosting* menu offerings.

sushi brands to budget brands making burgers and rolls – all of them from the same kitchen using a common team, thereby minimising operational costs. Premium brands like Parat also continue to be in demand. "The consumer today knows where to spend their money; while the numbers may be with the massy options, niche cloud kitchens continue to do well", observes

pricing when they choose a home chef."

Singh, whose customers remain loyal to Parat and its high quality in spite of its high price point.



just survive, is to work together - optimise operational costs, leverage partnerships, and offer the best to the customers. This is the way forward for cloud kitchens".

While the jury may be out on the perfect formula of running the kitchens, one thing is clear: cloud kitchens are here to stay, and consumers are ready to adopt them in all their varied formats.





## FOOD INDUSTRY TRENDS

Two dismal years of the pandemic took their toll and the Indian food and beverage industry has taken its time bouncing back in its wake. 2022 began on a cautious note, but the spectre of the pandemic faded by the second half of 2022, and there was a much welcomed uptick in diners stepping out again. Looking forward to 2023, India is the focus of many international hospitality brands. The local industry is also poised on the edge of rapid growth not just in the metros but tier-2 and tier-3 cities as well.

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Read on to see our expert panel's predictions on dining out trends in 2023.

## **Toolkit For 2023**

'Instagram-worthy stories' will be eagerly consumed, and there is nothing more alluring than content that showcases the regionality, diversity and plurality of Indian cuisine. Content creators and brands can get creative by experimenting with content driven by nostalgia and regional Indian cuisine, showcasing #BTS (behind the scenes) explorations of chef-driven creativity, highlighting the decadence of real ingredients. Sharing discoveries and research from chronicling, and immersive study of regional and world cuisines, through kitchen and menu experiments as well as inspired by gastro tourism will be areas to explore in food studies.



## Section At a Glance

In 2023, diners will have a staggering variety of options to pick from, with the industry serving up new concepts ranging from ingredient-forward and chef-driven small establishments to bespoke bars, vegan cafés, global, regional and even micro-regional speciality menus. Cloud kitchens will add to the smorgasbord with single-concept and innovative menus like never before. That said, diners in 2023 are evolving. While the post pandemic YOLO (you only live once) mindset lingers, the hunger for new flavours and exciting experiences will guide their choices. They will spend mindfully but with specific expectations and cautious budgeting.

This is the year to get experimental - for chefs to break away and put themselves out there with *cuisine-agnostic chef-driven menus*. There is no better time for the industry to take their brands to other locations with travelling restaurants and bar pop ups. Instagram-worthy stories will continue to sell, so experiment with nostalgia-driven menus and food theatre. Farm to fork will attract the diner of 2023, who is hungry for new frontiers of flavour but desires clean eating. Menus should explore the *culinary heritage* of unexplored regions such as the *North*-*East of India and tribal/indigenous flavours.* While the obsession with ferments continues, *locally-made global ferments* are set to explode, and *signature house*made products from professional kitchens will attract much attention.







## BAR & RESTAURANT CONCEPTS

Business boomed in 2022, with the pandemic at the back of consumers' minds and dining out seeing great fervour. Looking forward to 2023, the industry is poised for rapid growth. International brands are entering the market, established Indian brands are expanding, a generation of new young entrepreneurs is spinning out a host of creative new offerings. The diners of 2023 will have a staggering variety of new concepts to pick from!

This innovation is clearly manifesting in immense experimentation on the part of the industry and the diner, with more than three-fourths of our panel weighing in on the travelling restaurant/bar (chefs/ mixologists/restaurants popping up in other cities) being the top trend in 2023. However, a desire to be connected to roots while seeking adventure is clearly the way the land lies, with our panel almost equally divided between nostalgia-driven restaurant/bar concepts and show kitchen/food theatrebased concepts.



concepts closer.

Restaurants are looking for specialists to host collaborative pop-ups. Home chefs and food researchers fit the bill. They get an opportunity to share their expertise. And restaurants get visibility and promotion, making it a win-win for all. I see this on the rise in 2023!



Mag Street Kitchen was such a unique concept when it opened that I would describe it as 'dinner and a show', because you could literally see every step of your meal being prepared and plated! And diners loved the opportunity to interact with chefs. It elevated the meal experience. Open kitchen concepts are versatile enough for chef dinners, demonstrations and workshops. This format is definitely here to stay.

Masque Lab is a freestyle R&D kitchen we have designed to catalyse important conversations around food research, culture, and cuisine. With the world finally opening up, travelling popups promise to be big this year. Collaborations with outside chefs allow diners to enrich their knowledge and understand different cultures and cuisines.



Pop-ups and travelling restaurant/bar concepts offer loyal customers who support their favourite restaurants newer options and new things to try. like artisanal charcuterie and locally-made global ferments from popular chefs and bartenders who specialise in them. Travelling pop-ups bring these



Hussain





Rise of travelling restaurants/bars



Nostalgia-driven restaurant/bar concepts



Show kitchen/food theatre-based concepts





A restaurant's menu is central to the dining experience it offers, reflecting an establishment's brand legacy and personality. Consequently, it must keep evolving to stay apace with its diner's changing palate. It is no surprise then that the industry invests significant resources into innovation on this front. The diner of 2023 is hungry for real flavours and new experiences. And the industry is more than happy to work to deliver!

Our expert panel foresees diners continuing to crave flavours associated with nostalgia with menus inspired by culinary heritage coming out on top again. The last few years, however, also gave professionals in the industry a chance to travel, study, and introspect. As a result, chefs are increasingly coming into their own as creators and artists patronised by a loyal following of diners looking for new adventures in *cuisine-agnostic chef-driven menus*. There is also a clear desire to indulge mindfully, with our panel foreseeing *farm-to-table restaurant concepts* becoming a popular segment.



Menus inspired by culinary heritage



Cuisine-agnostic, chefdriven menus



Farm-to-table restaurant concepts



Health/immunity boosting, ingredient-forward menus



Menus inspired by culinary heritage have come out on top because these recipes and dishes have goodness, sustainability, finesse, technique, science, history, flavour combinations, fascinating ingredients, and above all stories in their favour! Multiply that by the staggering diversity of India's food landscape, and there is so much that restaurants can offer and diners can explore! 

Chefs are showcasing India at home and abroad. Menus inspired by culinary heritage are evolving, with chefs not only paying homage to forgotten traditional recipes, but also using local ingredients to enhance home-style delicacies with an array of international techniques.

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Seth



Cuisine-agnostic and ingredient-forward is an already growing trend especially in Mumbai, Delhi, and Goa. There will be more and more on that with this growing focus on local and heirloom ingredients.

Chef-driven restaurants offer a mix of cuisines and/or flavour profiles. Customers want to see the chef's specialties and innovation. Chefs are increasingly in search of new and indigenous ingredients and making produce shine. This inspires their menus, be it in the form of a dish or dedicating a whole menu to it. This is definitely going to be a highlight in all forms of F&B. 



Chef Urvika Kanoi

## **CUISINES IN FOCUS**

Each year brings a shift in focus when it comes to cuisines that the food industry puts its money on. A continuing mindset of curiosity and exploration of food and food cultures, and the desire to compensate for being confined will continue to manifest in the search for adventure on the palate and a desire to discover unexplored flavours in 2023.

These desires are clearly highlighted in the choices made by our expert panel. A *deeper exploration* of North-East India's micro cuisines and tribal/indigenous cuisines share almost equal interest. And, the furore over everything Korean in the younger generation across the length and breadth of India is clearly driving interest in *Korean cuisine*. That said, it is interesting to observe that whether the cuisines of interest are local or international, they share a common profile of clean flavours, functional, and mindful diet philosophies and indigenous ingredients.



and Priva

Ganapathv

and Yakisoba will be popular in 2023.

As a restaurateur running a Kashmiri cuisine space, I share from experience that diners are excited about new flavours. Indigenous cuisines cooked by people from the regions themselves are finding greater legitimacy, acceptance and love from them and this trend will continue to grow. Foods deeply entrenched in culture and inspired by the culinary habits of the local populace will continue to find takers.



Dhanashree Goregaonkar

There is increasing interest in hyper-local and foraged ingredients. These practices have been common in tribals and indigenous people across the country but are now becoming mainstream. The modern dining experience is more that just food; it's a holistic experience. People want to know the story of their food, and how and where it is sourced from and the communities and the people who cook it.

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With people exploring the not-so-touristy places in India, the cuisines associated with them are coming into the limelight. For instance, people now know Odisha has its own culture and cuisine, which is so understated yet so rich. Similarly, North Eastern states like Assam have their unique contributions towards Indian cuisine. 

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From Sake and sushi pairings to the entry of Kikkoman sauce into India, Korean and Japanese cuisine have been steadily on the rise. The subtlety, sublime flavours, and exquisite presentation make them very appetising. Takoyaki, Chawanmushi, meat Yakitori, Katsu curry, Donburi





Smita Priyadarsini



Tribal/indigenous cuisines



Exploration of North-East Indian cuisines



Mountain cuisines of India



Korean cuisine



Food categories are an important element of restaurant concepts and their menu offerings. While the years to come look really exciting for the industry, the learnings around origin and provenance, health, and mindfulness continue to drive choices for diners, chefs, and restaurateurs. While the pandemic forced the hospitality industry to pivot to sourcing locally and accelerating local and in-house production, it has embraced these categories with enthusiasm, and the experimentation this inspired will only yield commensurately delicious offerings.

The collective obsession with fermentation has not lost its effervescence: *locally-made global ferments* are set to explode; *health/immunity-boosting functional foods* will hold their own, and *signature house*made products will see a lot of experimentation. Most exciting, however, is locally produced artisanal cheese slowly maturing into its own with Indian cheesemakers winning global awards!



Locally-made global ferments



Healthy functional foods



Signature housemade products



Locally-produced artisanal cheese



Mehrotra

Cheesemaking and global ferments are gaining prominence. They sound more exotic. But, fermentation was always part of Indian culture. In my kitchen, we source black carrot kanji in season from a home chef and regularly use cheeses like Kalari from Kashmir · That said, it is great that the spotlight is on fermented foods, because it will bring out and preserve the hidden gems and traditions of our culinary culture.

Packaged ferments from professional kitchens will be popular in 2023. They add immense flavour, that extra oomph! Noma announced plans to remodel towards product development by 2025 — that's 20 years of R&D around flavour enhancement that they'll make available. And hobby cooks are getting more experimental with just that sort of thing!



Chef Varun Totlani



Chef Vanika Choudhary

fermentation to embrace koji-based fermentation. Ferments will expand from savoury into dessert and craft menus. The spotlight will shift to hyper-local sourcing that traces back to, and celebrates, the farmers that grow and harvest it. Hopefully, we will also see a much-needed shift to native Indian grain options like buckwheat, millets, and heirloom wheat varieties like khapli for sourdough!

2023 will see menus go beyond lacto

The hunt for 'funk' & umami will continue on the plate in 2023, thanks to the steady rise of ferment-loving millenials, because of whom fermentation has accelerated faster than a viral Instagram post! Happily this will drive interest in traditional Indian ferments perfected by our mothers, grandmothers & those who came before them.



Chef Rohit Sangwan



The cloud kitchen segment was already gaining momentum prior to the pandemic. It accelerated to exponential levels in the last two years. In the wake of the pandamic, there is some calibration in the segment, but with the economies of infrastructure and staffing costs it brings, it offers ripe pickings to the savvy entrepreneur.

Our panel foresees cloud kitchens making economical, nutritious *home-style daily meals* available to people juggling hybrid work models. Regional Indian cuisine concepts will continue to see traction, as will chef-driven speciality rotating menu-based offerings. Many chefs have moved on from restaurant jobs to start small independent ventures that will offer much adventure of the edible kind in 2023.



products will be welcome.

Cloud kitchen chefs must unlearn and relearn the basics of their regional cuisine. Then they can teach others and incorporate the same in their kitchens.



Ponnappa

replaced with offices.





Home-style food for daily consumption



Regional Indian cuisine concepts



Chef-driven speciality rotating menus

SINGLE DISH			
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Single-speciality concepts

## BEVERAGES

## SHAKEN AND STIRRED -THE EVOLUTION OF COCKTAILS IN INDIA

Cocktails, and by extension mocktails, are seeing a renaissance in India. Indian cuisine has a rich repertoire of traditional non-alcoholic and alcoholic beverages, and cocktails and mocktails - while a relatively modern recent construct - are growing into a segment full of potential for the beverage industry. This year, the Beverage section traces the evolution of cocktail culture from the first cocktails of post-colonial India to the vibrant offerings we can look forward to from the Indian bar segment, which is poised on the precipice of explosion.



## SOMA -3000-2000 BC

Soma is a drink that features in various vedic scriptures, and was often considered the drink of the Gods. It was produced from a plant of the same name but which plant specifically, remains under dispute. References suggest it could have been brewed from rice meal, wheat, sugar cane, grapes, or other fruits or plants.



## PUNCH - 17TH CENTURY

Considered to be the world's spice

## MOJITO, CAIPIROSKA, MARTINI EARLY 2000s

When Rick's at the Taj Mahal Hotel, New Delhi opened in 2000, New Delhi was introduced to the pleasures of the Martini. In the early 2000s, the first makings of a Mojito or a Caipiroska also came to be seen in Indian bars, like New Delhi's Turquoise Cottage and Mumbai's Tavern at the Fariyas Hotel.

## ► CRAFT BEER IN INDIA EARLY 2010s

The early 2010s were when India saw the establishment of its first microbreweries. It began as a trickle, but in just a decade the sector has grown to over 100 microbreweries across the major metro cities of the country. With this trend, Indians began exploring the world of variety that beer can offer - everything from wheat beers and ales, to IPAs, Stouts and more!





## FENI, TODDY & MAHUA - LATE 2010s

In the late 2010s, spirit brands began to distill, bottle and market drinks. Traditional drinks like Feni, Toddy and Mahua, were also systematically rebranded from crude country liquors to fine indigenous spirits, receiving long overdue appreciation amongst domestic and international drinkers. Today, they feature in innovative cocktails in some of the most exciting bars around the country.

earliest cocktail, Punch is said to have originated in India. Some accounts suggest that the name is derived from the Sanskrit word 'paanch' since the cocktail typically comprised five elements - a mix of alcohol, citrus, sugar, water and

## GIN & TONIC -**18TH CENTURY**

Gin was a already a popular spirit amongst the British when they India in the 18th century. Upon their arrival, British soldiers had to ingest quinine, an alkaloid, every day to prevent malaria. To cover the bitter taste, water, sugar and lime were added. To make its consumption more enjoyable, they began to add gin. And thus was born the Gin & Tonic.



## DISTILLATION IN INDIA **19TH CENTURY**

The first distillery of India was set up to make rum for the army in 1805 in Kanpur, followed by another one in Shahjahanpur, both in present day UP. Subsequently, the enterprising Parsi community began brewing liquor on the small island of Uran near the port of Bombay, and later started distilling spirits with the guidance of the British.





## ► THE GIN & TONIC RENAISSANCE **LATE 2010s**

The launch of Nao Spirits' label Greater Than Gin in 2017 kicked off India's gin renaissance. The drink has since seen a resurgence, quickly becoming the most vibrant spirit segment in the country, and kicking off a movement of homegrown craft spirits.



## **SHAKEN AND STIRRED -**THE EVOLUTION OF COCKTAILS IN INDIA

The Indian consumer today is looking for adventure for the palate, and this search for high notes of flavour has spilled into every aspect of F&B consumption, including beverages. The bar and nightlife segment is booming, with new bars opening across the country, daily, Mixology has become an area of rapid evolution with a steady rise in the phenomenon of the celebrity bartender across the industry. Home bartending has seen a rise thanks to people taking to it during the pandemic and aspiring to emulate the mixologists they follow!

Cocktails are blended drinks that contain a minimum of two liquid ingredients, at least one of which is alcohol-based. Being a relatively modern construct, there is no documented tradition of cocktail consumption in India. Unsurprisingly, its evolution in India, too, is relatively recent and most exciting.

## A Rich Tradition of Beverage Consumption

India – largely being home to a hot, humid climate – requires regular hydration, and Indian culinary culture has evolved a rich repertoire of traditional beverages. Historical texts also chronicle a variety of non-alcoholic and alcoholic beverages and blended libations, combining juices of fruits and vegetables, spices, herbs and flower-infused waters, along with sweeteners like honey and jaggery syrup that could easily classify as modern-day mocktails. And so, while there is limited mention, envisioning cocktail-like drinks that included ferments and alcohols is not too much of a stretch.

The first records of alcohol consumption go as far back as 7000 BCE in China. In India, excavations around the Indus Valley Civilisation sites uncovered complete distillation set-ups, which is evidence that

making alcoholic beverages was commonplace.

People eventually found ways to ferment and/or distill across civilisations and in India. too. observes Magandeep Singh. Columnist and Sommelier.

> "Take the Mahua for example: our ancestors found that if fermented, it

was a laxative. They singledistilled it instead, making it a famous ready-to-drink floral beverage worldwide".

He goes on to observe that alcohol evolved from initial experiments by ancient alchemists attempting to make elixirs to immortalise their kings, leading to experiments in chemistry, the eventual discovery of alcohol, and its preservation abilities. "Gradually, alcohol became sacred and found importance in the larger scheme of things", concludes Singh.

also chronicle alcohol through the ages. Several methods of preparing Soma are elucidated in the Rig Vedas. The Sutras chronicle alcoholic beverages like the Kilala, made of a cereal of the same name: Masara made of fermented filtered rice gruel; and Parisruta, which was a wide range of alcoholic drinks made from fermented juices of specific grasses and flowers. Valmiki's Ramayana also mentions various kinds of alcohol, as does the Arthashastra, which documents the drinking houses of the era. In the South, Tamil Sangam literature chronicles alcohol of the time. Drinks were referred to as Kal and were available in several variations with names like pizhi, theral as well as ariyal, naravu, and mattu, based on ingredients like fruit, cereals, and grains.

Historical texts and treatises

## The Advent of Ice

The Mughal era brought many advances and innovations. One of their biggest contributions to beverages was ice. They went to great lengths to document their culture and texts of the time, which throw light on their consumption patterns. The Ain*i-Akbari* by Abul Fazl documents the harvest and transportation

of ice from Panhar to their strongholds, where it was used to cool drinks and the emperor's much-loved Falooda. Ice would be wrapped in muslin, packed in jute and wood shavings to insulate and prolong its shelf life before it was transported over two days, through a 14-stage journey to the royal kitchens.

The practice continued down the centuries and was eventually adopted by the British, who also used it to cool their drinks.



## **Early Cocktails in India**

When the East India Company first put down anchor along the hot and humid West coast of India, the extreme heat was debilitating, and they adopted local drinks as well as the practice of harvesting ice from the Mughals to cool them. Over time, they devised a technology to import ice by sea, and as society evolved, private clubs and bars came about, ice houses came into existence. Records reflect that in May of 1840, the Byculla Club in erstwhile Bombay ordered 40 tonnes of ice! The ice factories still exist today as a legacy of that era.

The Colonials also brought with them the most important aspect of the cocktail, the alcohol, By the time they arrived in India. they already had a rich drinking culture. However, their preferred tipples of beer, rum, whiskey, and wine could not survive long sea voyages, so they had to resort to local alcohols that were coarse spirits whose flavours needed masking.

The Punch was one of the earliest cocktails born of this

## The Mushrooming of India's Bar Culture

It was the colonials who catalysed the first eating houses, restaurants, and bars in India. Alcohol was an integral part of the colonial social construct as well as part of army rations, both of which drove the growth of the early bars in and around British settlements.

## The Evolution of Cocktail Culture

Cocktail culture first began to evolve as a premise of high-end, free-standing bars and 5-star hotels according to



Vikram Achanta, Founder of Tulleeho and Co-Founder of 30 Best Bars India. It was at this time that

consultants like Shatbhi Basu began evangelising cocktails,

need. It got its name from the Indian word paanch meaning five, because it was made of five ingredients. The base was Arrack - a coarse spirit favoured by settlers in Goa and Bengal - made from grains like rice and coconut palm sugar or sugarcane. They added sugar, lime, spices, and water to improve its unpalatable flavours.

The fact that it also stood up to the extreme heat made it the preferred choice at official meets, eventually becoming so popular amongst the colonels and soldiers that the Portuguese took to the word, and drinking houses in Portugal came to be called Punch houses! Variations of the Punch also evolved. including a Punch mixed with soda called the Cup and a sparkling option made with champagne that became a popular libation at outdoor lunches.

Another popular cocktail that evolved at this time was the Gin & Tonic or G&T. As the British position in India strengthened, malaria ran rampant in their

This early drinking culture was also adopted by the Brown Sahibs (Indians who worked closely with the British and emulated their lifestyle) and was inherited predominantly by the Anglo-Indian community. Post independence, Indians took over these establishments, and the

#### ranks. A tonic made from the extract of quinine, derived from the bark of the South American cinchona tree, was prescribed to address the malady. Being excruciatingly bitter, it was 'administered' with carbonated water and sugar.

This coincided with the arrival of London Dry Gin in India. Gin did not enjoy an elite status in England, but the removal of export duties on the spirit in 1850 and a law mandating that every British ship must carry a quota of gin was passed to promote it in new markets catalysing its popularity. Innovative sailors began adding it to their tonics to alleviate the bitterness, and in the process, created the G&T, and gin was elevated in status to a gentleman's drink.



concept of a club culture began to grow amongst the affluent. Cocktails became a natural choice for those who shied away from imbibing spirits openly. Over the next few decades, the bar culture continued to grow at a steady pace with the evolution of India's dining industry.

and early movers in the industry began focussing on their beverage programming. "When Rick's opened with the services of foreign bar consultant Andy Pearson at the Taj Mahal Hotel, New Delhi in 2000, the capital was introduced to the pleasures of the Martini". remniscises Achanta, "The big leap in the evolution of cocktail

culture in India came with the opening of New Delhi's PCO and Gurugram's Cocktails and Dreams Speakeasy", he explains further. "Unlike restaurants that also had a cocktail programme, these were primarily bars that fast built a loval following of cocktail enthusiasts! The first makings of a Mojito or a Caipiroska came to be seen

two decades ago at bars like Turquoise Cottage in Delhi and The Tavern at the Fariyas Hotel in Mumbai", concludes Achanta.

Around this time, brand ambassadors from companies like Diageo, Bacardi and others began travelling and acquiring global exposure to distilleries and international bar cultures.



"These early brand ambassadors were instrumental in bringing about big

change. They returned with all this knowledge, started training programmes for Indian bartenders, and taught us to work with fresh ingredients", shares V. Karthik Kumar, a

Bengaluru-based mixologist and beverage consultant.

"The ecosystem we see today finds great cocktails at almost every bar, including home bars", observes Thrivikram G. Nikam, Joint Managing Director, Amrut Distilleries, who goes on to attribute a significant part of this transformation to pop culture and the growth of bartenders/mixologists/savants into celebrated voices with fan followings that drove the transformation in bar offerings. "Other key factors

propelling this momentum", he points out, "are first-time consumers often

#### (alcopops) products that act as a pathway to the world of cocktails". The pandemic and its many lockdowns forced the beverage industry to pivot fast to create in-home propositions for the home-bound consumer driving phenomenal growth in the ready-to-drink market as well as other segments

such as ready mixers, cocktail

picking cocktails as a gateway

into spirit consumption and

the advent of ready-to-drink



## What Drives the Cocktail Market in India Today?

Post pandemic, the consumer has not lost their taste for in-home consumption and house parties. However, they are now eager to step out and savour exciting new flavours and tastes. The Millenial and Gen-Z segments, in particular. are driving a high demand that is manifesting in the dynamic growth and evolution of the bar segment across concepts and menu offerings.

The Top 50 Bars in India list for 2022 by 30 Best Bars India -India's only independent bar ranking and awards platform is a testament to the fact that the bar segment is booming. Mumbai has seen a doubling of bar concepts launching in 2022. And cities like NCR, Bengaluru, Goa, Kolkata, Hyderabad, Jaipur, Chennai, Pune, and Guwahati are all showing tremendous growth with a menu of offerings like never before!

"Single-spirit-inspired concepts and new brands will definitely grow, observes Shatbhi Basu. master mixologist and partner at Mumbai's STIR Academy of Bartending.



"The Made in India category is definitely getting extremely interesting. And it's about quality, not just volumes,

with gin being the current favourite alongside both singlemalt and blended whiskies. Rum is the next big thing to look out for, but we should also see some interest in liqueurs and *ready-to-drink categories*", she forecasts. Cocktails using these spirits is a natural extension that will also drive innovation in all aspects of the segment – from glassware, to speciality ice, mixers and more. "Passionate people are getting involved in the process, and that's what is most exciting", Basu concludes.

There is an explosion of Indianbased alcohol brands creating unique spirits that capture the flavours of India in a bottle. The exciting new offerings on bar menus today are largely thanks to a legion of new 'Liquid Chefs'. Like chefs are celebrated for creating magic in the kitchen and bringing unique flavours to a plate, Liquid Chefs are mixologists and bartenders who are bringing the same creativity and innovation to the glass.

> "Mixologists in India are increasingly using science-driven techniques like

clarification, ageing, fermentation. and carbonation". shares Radhika Dhariwal.

founder and director of Pass

Code Hospitality. "Bartenders view themselves as scientists experimenting with flavours and equipment like rotovaps and centrifuges", she elaborates. "The bold use of regional, local ingredients in menus – from Indian herbs, flowers and spices to even vegetables - and the savoury cocktail - umamiheavy drinks, cocktails with pickles, brine — are defining the segment", she concludes.

"There is a lot of investment in equipment and machinery for bars by the industry today," adds Basu, "With easier access to information, professional bartenders can make a convincing case for such investments with owners looking to have a strong beverage programme. Expensive equipment to distill flavours, dehydrators to create concentrated fruit and herb powders help enhance the products they are added to, both visually, and in flavour", she concludes.

directions according to *Devyani* Bengaluru, who recalls being inspired by breakfast pancakes.

breakfast, blending bourbon with maple syrup and adding an Indian twist, with vermouth infused with bitters and spices like bay leaves, star anise and *fennel."* She then aged the mix in bourbon casks and created what she named the Bourbon Age.

Infusion is just one of the approaches that are being experimented with. Clarification,

## **Cocktails Evolution Going Forward**

Sustainability is a huge area of exploration. Mindfulness for the environment is a concern amongst consumers, bartenders, and mixologists. Not only is this a test of innovation and creativity but also a sign of times to come in the world of cocktails.

"Sustainability has been a buzzword for a long time, but it is only now that bars are embracing this more holistically in terms of reducing the waste that goes into each cocktail", shares Dhariwal, who believes we are entering an age of conscious drinking with healthy (think low-proof alcohol levels) and environmentally responsible cocktails. Rootto-shoot, using every part of a fruit, re-conceptualising kitchen waste to add flavour to cocktails and mocktails are all par for the course. At Copitas, Four Seasons Hotel Bengaluru, the Greener Future menu is inspired by the ethos of using the whole plant - from seed to fruit on the bar menu. The idea is to ensure synergy between the kitchen and the bar to ensure

## **Focus Areas for the Cocktail Industry**

The Indian consumer of 2023 is hungry for new flavours and adventures in their glass and will enthusiastically welcome what the industry will serve up. The cocktail industry has already begun what promises to be a happy period of rapid growth and evolution. This is the time for the industry to experiment with concepts, categories, special menus, cocktails and food matching, pop-ups and more! A happy fallout of the pandemic is that the consumer has taken to home bartending with gusto, which has opened up a world of opportunities for the in-home market.

As far as innovation is concerned, there are no limits! While the classics will never go out of style, tipplers will welcome them with signature twists by their favourite mixologist. The excitement

Inspiration comes from all Nath, assistant beverage manager at JW Marriott, "I decided to create a drink that embodied the idea of

fat-washing, sous-vide, fermentation, milk-washing, wood-smoking and more are also being explored. At Comorin in New Delhi, for example, a 'sous vide bar' is where little bags of alcohol like gin or vodka are augmented with ingredients like orange, smoked pinewood, rose, hibiscus and more, and cooked in sous vide before being served up to guests.

At Slink & Bardot in Mumbai, the flavours of Jackfruit are recreated for a cocktail without any use of the actual fruit, and only techniques of fermentation and clarification being employed.



the culinary concepts of local ingredients, seasonality, and ideal pairing, are all embodied in both food and drinks.

During his travels in Europe and the USA, Yash Bhanage, founder and chief operating officer at Hunger Inc. Hospitality, found menus becoming smaller.



"The bartender became the CEO of the bar in the USA because of labour

issues, but it helped bars evolve. We will see more of that happening here", he says, going on to elaborate that "There will be smaller lists, with a focus on fresh ingredients and what the bartender feels is the best drink to make with them. Bartenders didn't make these choices in the past, but now they will."

Achanta forecasts that going forward there will be more diversity behind the bar. "We are seeing early signs of growth in cocktail culture in tier-2 and even select tier-3 cities according to our 30 Best Bar Top 100 list for 2022. Five-star hotels are also

getting back into the act." Basu agrees, adding, "What will stay or go will depend on how young bartenders evolve and understand the fine line between becoming a mad scientist and balancing flavours. Right now, everything we see is all in the experimentation stage. and we must wait and watch".

All said and done, while techniques like coconut oil fat washing or adding Indian sarsaparilla, tamarind, turmeric, kokum and more to create exotic offerings give Indian mixologists a unique edge, Bhanage sums things up succinctly, "Indian-inspired cocktails need to be used more to promote India as a cocktail destination and not just as a gimmick".



to experience regional and global flavours and single-spirit-driven concepts such as gin and whiskey will all drive cuisine-matched and spirits-specific cocktail innovation using Indian flavoured bitters, infusions, mixers.

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The focus on health and mindfulness will drive parallel demand in cocktails with no- and low-sugar options. Mindful use of ingredients and sustainability are going to be buzzwords at the bar. All of this will drive demand in all aspects of the cocktail segment, including ancillary industries like ingredients, equipment, glassware, speciality ice, bitters, mixers, and more. Commensurately, there will also be an increased demand for books and courses targeted at knowledge and skill enhancement in hobby and professional mixology and bartending.

## **BEVERAGE TRENDS SURVEY**

With the dining in and dining out categories evolving rapidly and gastro tourism on the rise, the beverage segment will see equal or more measure of evolution in the demand for global products. Beverages complement most eating occasions, but as demographics evolve, consumption occasions and configurations are also changing, and beverages are becoming the focus. Beverages are no longer simply thirst quenchers or social consumption tipples; they have encroached into meal segments like breakfast and snacks (think smoothies).

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Turn the pages to read our expert panel's forecast of the Beverage industry in 2023.

#### **Toolkit For 2023**

There is no better time for the industry to experiment with *participating in alco-bev festivals* and travelling bar pop-ups to engage new TGs. Instagram will continue to be the place for beverage consumers to discover brands and bars. Industry players will benefit from leveraging F&B Observance Days like World Whiskey Day (May 20), Chai Pakoda Day (July 30), International Coffee Day (Oct 1) to showcase creative offerings and drive conversations. Content creators and beverage writers might want to focus their research and writing on the history and evolution of cocktails and the sustainability in the glass and cup.

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## **SECTION AT A GLANCE**

Consumers are excited to experiment with beverages, be it with flavours, blends, mixers home bartending, barista-ing bar crawls, tea garden tourism, coffee tastings, or walks. While the ever-expanding offerings of the cocktail space have been covered in the essay for this section, it should not be forgotten that India is home to a significant *teetotalling population* that are avid beverage consumers offering a dynamic market as well.

Non-alcoholic offerings like mocktails and zero-proof drinks are an area of growth to consider, both at home as well as outside. Gourmet Indian-origin artisanal coffee and tea, will continue to inspire innovation across categories in the F&B space and is a great category to experiment with. The interest in cuisines of unexplored regions such as the North-East of India, or those with tribal/indigenous flavours will drive exploration into traditional ingredients, local beverages, and *local and* locally-made global ferments from these regions. Exploring local bars, coffee and tea experiences will be very exciting for gastro tourism propositions, and the food travel industry might want to innovate in this area.

## **BEVERAGE TRENDS** IN HOME KITCHENS

The beverage industry has worked over time to innovate for the in-home consumer in the last couple of years. No wonder then that the choices for everything from tea and coffee to dairy, non-dairy, proteinbased, nutritionally-fortified, small-pack, alcohol, cocktails and mixers for home bars, fermented drinks, and more, are varied and wonderful to pick from!

Our panel of beverage experts predicts that 2023 will see a rise in gourmet Indian-origin, artisanal coffee and tea, with the national sentiment continuing to look towards homegrown. Specifically looking inside the home, consumers will continue to look for *mixers for home bartending like tonics*, flavoured sodas, or even cocktail and mocktail pre-mixes. And finally, with the average Indian consumer looking for quicker ways to meet their demands, *ready-to-drink beverages* will always be in demand.



stature to our best-recognised chefs.

We are becoming more health conscious. And while we are socializing with a vengeance, it's a

wiser choice to have that glass of zero alcohol beverage in hand.



and those that mix with it!

The vastness of India's geography and related climatic conditions offers us endless opportunities. I am absolutely delighted to see connoisseurs and entrepreneurs investing in building world-class spirits, bitters, mixers, etc. This opens numerous

flavours and truly be original.







The alcoholic beverage segment has always been one of the most lucrative aspects of the hospitality industry (offering spin-off opportunities for small plates, bar menus, and more). Today, pubs and bars are open, and business is roaring! Consumers have returned to savouring their poison of choice, and the beverage industry is rolling out new experiences and options for their delectation!

Our panel of experts looks forward to collaborations and alco-bev pop-up events taking place in a big way in 2023. These are fantastic ways for the industry to grow and for homegrown brands to increase their presence across the country. With the current sentiment continuing to lean towards local and regional, India-made will continue to be the flavour of the year. Our panel determines that the expanding variety of Indian-made spirits will take the forefront in 2023. This is great news for our homegrown brands. When it comes to the drinks of the year, Indian-ingredient infused and flavoured alcoholic drinks make it to the top. The current national sentiment will only continue to lean towards local and regional. In fact, more than half of our panel has predicted that consumers will indulge in indigenous spirit-based cocktails this year.



Expanding variety of Indian-made spirits



Indian-ingredientinfused and flavoured alcoholic drinks



Collaborations and alcobev pop-up events



Indigenous spirit-based cocktails (eg. feni and mahua cocktails, etc)



Singh Chadha

Promotions and celebrations around spirits and mixers have been a trend for long. It has just taken the local route. Events are successful because they bring a fresh take every single time they take place. People are ready to pay extra bucks for celebrity bartenders.

The rising popularity of Indian-made spirits has been a case in point, especially with gins and whiskeys. This is only going to grow. Collaborations in the alco-bev space have been the name of the game; the outreach becomes larger, a bigger purpose gets spoken about, and everyone wins!



Agarwal



Indian craft beers are gonna be on the rise· Indian single-malt, gin, and blended spirits will become cost effective and easy to procure.

Sushil Dwarkanath

We have amazing award-winning brands, bartenders and bars in India. There is immense potential in bringing Indian spices and flavours to life with bitters and mixers. They make for easy-to-make cocktails at home, and people love it when fancy is made easy for them.

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Katiyaı



India is a significantly tee-totalling country and has a buffet of options available. Recent years have seen unprecedented growth in the non-alcoholic beverage segment as drinks expanded from just restoratives like tea, coffee or aerated drinks to indulgences, healthy nutrition-fortifying meals, snack replacers, and more. Each category has a plethora of offerings that are designed to meet the rising demand.

Our panel is firm in the fact that global fermented beverages (eg. tepache, kombucha, kvass, etc.) are going to be the top non-alcoholic choice in 2023. While kombucha has already seen much popularity in the last five years, other drinks like tepache and kvass are not too far behind. Moreover, the average consumer continues to look for healthy options and *immunity- and functional health-boosting* beverages have made it to the list this year. Finally, with the vegan and plant-based revolution rapidly building up, *plant-based dairy alternatives* are continuing to gain momentum and look like they will be trending in 2023.



the nostalgic/back-to-childhood genre.

Drinks that aid digestion, those that are good for gut health seem to be the focus of cafes and restaurants alike. Furthermore, people take time ordering their drinks these days, while keeping in mind the foods they are ordering. \_\_\_\_\_



Sharad Dewan

Socialising is getting redefined; it no longer needs to be only in the evening over drinks. It can be any time of the day · Food-centric drinks with interesting combos and loads of health benefits will be in demand. Drinking nonalcoholic drinks is now fashionable, too.

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Gut health has gained a lot of importance, long overdue, after the pandemic. This will see a phenomenal rise in the demand for fermented beverages.



Flavoured waters with Indian herbs and spices as a body for non-alcoholic drinks will trend, as will usage of Ayurvedic and indigenous ingredients. Retro will be back in a modern avatar under



Jalaludheen



Ajeet Kalbaq



Fermented beverages (eg. tepache, kombucha, kanji, kvass. etc.)



Immunity and functional health-boosting beverages



Plant-based alternatives to dairy



Vegetable & fruit iuice bars



The coffee revolution took India by storm in the early 2000s, positioning coffee as the beverage at the centre of the concept of 'meeting for drinks'. With work-from-home and work-from-a-cafe continuing to be popular, consumption of coffee in home and outside continues to evolve as the industry continues to innovate.

As consumers continue to explore coffee, our panel foresees interest in coffee tasting, brewing, plantation tours and other educational/experiential workshops growing exponentially. With the in-home consumer experimenting like never before, home brewing and hobby barista-ing will grow. And like other segments, with coffee too provenance-focused coffee and interest in producer origin, elevation, estate and the like, will garner more interest in 2023.



Coffee educational/ experiential workshops



Home brewing/hobby barista-ing



Coffee-based beverages



Provenancefocused coffee



Kapadia

As a coffee aficionado, I am delighted to see the 'Cold Brew' finally claim its place in the sun. It's the best way to showcase coffee, especially given India's tropical geography. A cold brew must be the perfect balance of smoothness without compromising on flavour.

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People are curious about the origin and processing of their coffee and are switching to other coffee beverages. Arabica is just 33% of the total Indian produce and is becoming rare and expensive· The quality of robustas, alternatively, is improving and will gain more popularity

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Pai

Increased exposure to foreign coffees and expanding tastes have resulted in people opting for international, niche coffees, coffee-based cocktails and mocktails like coffee-flavoured gins and coldbrew mocktails with tonic water.

With more brands retailing specialised beans for people to take home and experiment with including the sale of equipment — home brewers/ baristas are taking it up as a hobby and pursuing a new wave of coffee appreciation.

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Merchant

## TEA

Tea consumption is legendary in India, so much so that India completes 200 years in tea consumption in 2023. In recent years, it has evolved into a culture that encompasses not only the traditional forms of 'chai' but also a variety of tea leaves, Ayurvedic or herbal teas, tisanes, and much more. Tea-driven experiences like tea tasting and estate tours are also on the rise.

Gone are the days when tea was just about cutting chai! Today, the consumer has become smarter, more worldly and is looking for much more. Our experts predict that caffeine-free, herbal-infused teas will see a rise in 2023. However, the discerning customer won't move as far away from Indian chai as we may think. Consumers are looking for *innovations in traditional chai and its variants*. Moreover, they will get even more experimental with a rise in the consumption of tea-based cocktails/mocktails and sparkling teas.



well the community at large.

Tea has been a beverage of choice for 200 years now. We have now understood that Theanine, a compound found in tea, increases calm and induces relaxation. This is why we have a favourite cup, person or place we go back to for chai.



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Fostered by the republic of technology, the quantitative and qualitative rise of tea varietals and the competitiveness of the shelf space have all contributed to a surge in tea consumption nationally and internationally. The growing efficiency of channel marketing and delivery aggregation have also contributed greatly. No wonder then that today an amazing variety of options for Camellia Sinensis are everywhere from aeroplanes, to multiple avatars in the food industry as well as on the high seas.





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Kumar

The current generation of Indians is health conscious, can afford different types of tea, and is willing to experiment with floral and herbal infusions. This space will grow but will not exceed 2% of India's tea consumption, the demand being mainly concentrated in the urban areas. That said, tier-2 and -3 cities are fast catching up.



Diwan Gautam Anand



Increased consumption of herbal and floral-infused, caffeine-free teas



Innovation in traditional Indian Chai and its variants



A shift to sustainable packing in teas



## A LONG LEGACY OF BAKERIES IN INDIA

## SWEETS & DESSERTS

## **BAKED AND BUTTERED -**THE EVOLUTION OF INDIAN BAKING AND PASTRY

Baking and patisserie has a long and diverse history in India. While we adopted and adapted ingredients, techniques and concepts from a string of rules and colonisers, we also found ways to make them our own. Just think of the veg puffs, cream rolls, rum balls and jeera biscuits you find in your neighbourhood bakery. Local bakeries around the country have been sources of exotic delicacy, sweet indulgence, and after-school snack nostalgia. This year, the sweets and desserts section takes a fascinating trip around India and showcases the evolution of Indian baking and pastry.





## DOTIVALA BAKERY, SURAT --

Established by the Dutch in the 1600s, and handed over to one of the 5 Parsi bakers first tasked with running it, Faramji Pestonji Dotivala, when they left. Legend has it that the early breads were toddy fermented. The family has been running it since 1861.

Famous offerings include breads, Irani biscuits and Surti Batasa.

## ALBERT BAKERY. BENGALURU -

This iconic bakery was founded by Mohammed Suleman in 1902, and is presently managed by father-son duo Nawab Jan and Sabir Faizan. It has continued with its old-school timings and opens only in the second half of the day. It was named Albert Bakery to attract Britishers.

Unique offerings include keema samosas, brain puffs, and khova naan.

NAHOUM & SONS

## NAHOUM'S, KOLKATA

Started in 1902 by Nahoum Israel Mordecai, a Baghdadi Jew, who delivered baked goods from door to door at first. The physical bakery was established only in 1916. Nahoum and Sons' mix western staples like brownies with Jewish and Middle Eastern confections like challah bread. Their coconut and cheese samosas are a fantastic example

Specialities include marzipan, baklava, and Jewish cheese samosas



## KARACHI BAKERY. HYDERABAD --

Today an iconic national chain, this bakery was established in 1953 by Khanchand Ramnani, who migrated to Hyderabad from Sindh. With a strong tea-drinking culture thanks to local Irani cafes, locals quickly took to Ramnani's biscuits. By the early 60s, Karachi Bakery monopolised the biscuit market

Famous for its fruit biscuits and Osmani cookies.



## MAMBALLY'S ROYAL **BISCUIT FACTORY**, THALASSERY -

Founded in 1880 by Mambally Bapu who, legend has it, mastered the art of biscuit making in Burma. Wanting Malayalis to discover baked goods, he improvised with toddy to ferment his bread dough. Mamballys also claim to be the first bakery to make Christmas cake in India in 1883.

Specialities include Christmas cake and over 40 types of buns.

## SMITH FIELD BAKERY, CHENNAL ----

Established in 1885 by Ponnuswamy N in the heart of erstwhile Madras, with the fourth generation of the family at the helm today, this bakery has survived two World Wars, and legend has it, supplied bread for free at times of food shortage.

Specialties include chicken and veg puffs and freshly baked bread.









## AHDOO'S, SRINAGAR

Opened in 1918 by Mohammad Sultan, who, legend has it, was sent to Kolkata by the then Maharaja of Kashmir, Hari Singh, to learn how to bake. The bakery he learned from was a confectionary run by the East India Company.

Specialities include sheermal and bakarkhani, and a variety of walnut biscuits and tarts.

## WENGER'S NEW DELHI

Designed in 1926 by British architect Sir Robert Tor Russell, Wenger's was started by Swiss couple Jeanne Sterchi Wenger and H C Wenger in 1933 and bought over by its manager Brij Mohan Tandon in 1945, whose family has been running it since. Fun fact: During the British rule, Wenger's would move to Shimla for the summer

Known for its tarts, apple pies and chocolate Frankfurter rings.





## **BAKED AND BUTTERED -**THE EVOLUTION OF INDIAN **BAKING AND PASTRY**

Baking and patisserie, though not traditional, came to India as part of culinary exchanges with a succession of foreign cultures that arrived in pursuit of wealth, land, and glory. Over centuries, these cultures intermingled, and populations moved around the subcontinent, carrying their culinary practices with them, adapting to different regions and evolving local offerings that resounded with the character of the local region. And like so many other influences, Indian culinary culture made them its own.

## The Advent of Bakeries

The first records of baking in India date back to the 1500s when two distinct traditions were introduced and evolved. The Portuguese introduced leavened bread in the Western coastal regions, and the Mughals brought their tandoors and unleavened breads to North and Central India.

It was in the 1500s that the Portuguese made pao in Goa. With no access to refined flour, yeast, or even the oven they used back home, they were forced to adapt their recipes to locally available produce and techniques. And so, the Portuguese Pao evolved – made with whole wheat flour, fermented with local toddy, and baked in improvised open ovens fueled by coal. So successful was the endeavour that even today, five centuries later, paos and poi are still made the same way in Goa.

Far away in the North West Frontier, baking meant something entirely different. At the heart of the busy silk route,

Central Asian tribes carried dry leavened breads that went on to fuel their armies on the long journey to India. These were baked in makeshift clay ovens much like the tandoors of today wherever they stopped to refuel. Records tell us that these legendary breads continue to be consumed in India, especially in Kashmir and Punjab

> "In Kashmir, the neighbourhood bread bakers, or kandurs. are.

even today, very important; every neighbourhood has its own baker, and every region has its own version of bread", shares author and journalist Marrvam H. Reshii. whose husband is Kashmiri. Kandurs continue to bake a staggering variety of bread that vary by region and include tchot, kulcha, tchachvoru and lavass. Locals continue to rely on them for their daily supply.

Over the next few decades, as the sea route to India opened, other trading communities

brought their baked goods as well. Indian cuisine took everything that came its way and spiced it up. Legend has it that the much loved, ubiquitous khari — the laminated flaky pastry biscuit also called Fain was a contribution of the butterloving Persian-Iranians. The Dutch introduced India to the Nankhatai, which has come to be called the Indian shortbread cookie made with flour. semolina, sugar, and ghee. And, the iconic British Shrewsbury biscuit — an English classic was adapted into an eggless version by Pune's Kayani bakery, which opened in 1955! Biscuits were also flavoured with spices - jeera in khari, cardamom in nankhatai, and bread and pao became the perfect vehicles to soak up spicy curries, bhaji, or keema!



## **How Baking Spread Across India**

Over time as the colonial influence grew and breakfast and teatime evolved into meal constructs, breads, pao, naans, rusks, and biscuits were increasingly adapted in Indian households across all demographics. They offered the housewife some respite from making rotis for every

meal. Bakeries grew to become intrinsic to culinary ecosystems. Specialised baker communities evolved, such as the kandurs of Kashmir; nanbais of Lucknow, Hyderabad, and Delhi; paders of Goa: paowallas. Parsi and Irani bakers of Mumbai and Gujarat; all collectively offering a legion of baked goods that expanded

to include various local versions of cakes, pastries, and more.

Cities like Allahabad, Kochi, Kolkata, Mumbai, Bengaluru, and Dehradun that had significant European colonial populations, meanwhile, became famous for specialised Western-style bakeries that

catered to the upper classes. Eating and serving readymade offerings from these establishments and bakeries became a status symbol. "Bakeries came to Doon in the 1830s or 40s with the British and replicated products like breads, cakes, biscuits for the British population and boarding schools here. We opened in 1953 and have since been the premier bakery catering to the who's who of the city". savs Palak Gulati. thirdgeneration owner of Elloras in Doon. While most bakeries in Dehradun todav owe their origins to the pre-independence era, post independence, they acquired new Indian owners who continue to run them on centuries-old recipes, and this can be seen across the country.

"The oldest bakery in Mangalore is about 200 years old, but L am sure there were bakeries here before that, too", observes Shriya Shetty, co-founder of

## **Baking Comes Into The Indian Home**

By the mid-1900s, bakeries became *de rigueur* across India. So much so that baking became a new phenomenon in home kitchens as well. Soon, having an oven and knowing how to use it was a symbol of affluence. Many women of more affluent families took to baking at home. Large, round electric ovens became a fad, as is seen in the movie Parineeta where the main protagonists are shown trying to bake a cake in one of them. Gas tandoors were also invented around the same time. and for every young woman aspiring to be married, knowing how to bake became an added qualification.



"Many homes had gas top tandoor ovens while I was growing up; these

are still used in smaller towns like Dehradun perhaps because electricity is erratic. My

along the line puffs were added *too".* The inclusion of regional nuances and tweaks to address local flavour palates helped locals accept hitherto foreign foods. Today, the puff filled with a spicy chicken or egg stuffing, is a mainstav of a bakerv in Mangalore. The breads lean towards being slightly sweet, and cakes are preferred without icina.

If the West filled its puffs with spicy fillings and sweetened its breads with milk and sugar. the North spiced its rusks and biscuits with the earthy notes of fennel and cumin. Iyengar bakeries in the South added accents of coconut to

Buttercream Co., a bakery and patisserie in Mangalore that aims to revitalise the baking heritage of the region. "At the time", she adds, "these were



humble shops that made few things like basic breads and cakes. Somewhere

grandmother, however, used a round spaceship-like electric oven to make Handvo when I was young. It was something like you see in period films now. Our home also had a state-ofthe-art oven and stand mixer from before I was born that my mom had inherited and used to bake everything", says Rushina Munshaw-Ghildival. Culinarv Chronicler and Food Consultant at A Perfect Bite Consulting. who grew up on a steady dose of home-baked goods. In most homes in the 1980s, baking was done in a circular aluminium oven that made the most delicious cakes, mostly old-fashioned vanilla pounds occasionally adorned with hand churned buttercream; and Nankhatai, a simple recipe that had reached our shores with the Dutch centuries earlier but had been mastered by Indian

mothers over time. The more

offerings like dilkhush and local macaroons (distinctly different from their European brethren). In the East, and further North East, with Kolkata being a British bastion, the more elite offerings of the Western baking repertoire like almond pastries, marzipan, and date sticks evolved into British-inspired teatime treats. On one end of the spectrum were the community bakers catering to the common man, and on the other were elite bakeries dishing out elaborate offerings like cakes, pastries, biscuits and more to the affluent - both the colonial Europeans, who continued to live in India, and the brown sahibs, the Indians who over time had adopted Western lifestyles including eating habits.



well-travelled made au-gratins. roasted chicken, and baked pizzas.

The neighbourhood bakeries, which by now had moved on from being community bakeries to fancy shops, replaced atta biscuits and rusks made with ghee and butter to cakes and tinned biscuits made in Dalda, India's favourite shortening. Slowly, yet steadily, bakery and bakery products settled further into India's food system.



#### **High-end Hotels Lead The Charge**

Premium hotels in the country also emerged as leaders in the baking segment. With a target audience that had the means to pay premium prices for their products and better access to resources, they first assembled bakery sections locally and then began to import quality ingredients and equipment and maintain teams of trained patissiers and bakers.

"In the 80s, most commercial ovens were wood-fired and made of combinations of material like glass, salt, soil and stone". shares *Chef Devender* Bungla, Corporate Pastry Chef, Hyatt Regency Delhi, who has witnessed the evolution of the baking and patisserie segment



was done manually - the dough was de mixed using hands, and bread, cookies, and pastries were all hand formed. Bakeware was also limited and less refined. We baked biscuits like Nankhatai on a flat griddle: tables for bread were made of wood; and dough for laminated breads was rolled using long iron rolling pins". Not to mention the ingredients that were all natural, too - the starters, flavours, herbs, and butter used were fresh and of the highest quality. No surprise then that

5-star bakeries, like the Sidewalk at Hyatt Regency Delhi, were reputed for their quality.

Change came post liberalisation in the 1990s when Indians began to travel abroad and taste Western bakery products, and establishments were able to import international quality bakeware and equipment. In iust a few years. Indian bakeries were producing international quality products from scones to gateaux to croissants, cookies, and much more.



## The Golden Era of Indian Patisserie

A pivotal point in India's patisserie came at the turn of the century. "It was around 1999-2000 that Indian patisserie saw a big shift", says **Shivan** Gupta, founder of Cafe Monique *in Delhi.* "Until then we were happy with a few good bakeries like Wenger's in Delhi, Ellora in Dehradun, Flury's in Kolkata and the like. The offerings were limited to classics. The 2000s brought the IT boom, disposable incomes rose, and eating out became more popular".



"The patisserie segment saw a spike in innovation. and

Indian consumers

had a plethora of newer products to savour, including macarons (both French and Italian), profiteroles, millefeuille, madeleines and croissants. India was set for a pastry revolution".

"When we came to India, there were no good pastry options here. Hotels were the only places you could get good quality bakery items, but they were too few and too expensive for the common man". savs Kazem Samandari. Founding Chairman of L'Opéra-Pâtisserie, Boulangerie and

Salon de Thé that opened its doors to Delhi in 2011. The idea, according to Samandari, was to bring authentic French pastry to the capital since no one else was doing that. In its 11th year now, L'Opéra has revolutionised how Delhi eats cake! It introduced authentic French macarons, madeleines, choux, and croissants to a city used to cream rolls and puffs. "We started with 40 products and today we produce over 2000 products". The reason for this rapid growth is the growing awareness and evolving palate of Indian consumers.



value us for the quality, consistency, and of course innovation and are happy to pav a premium". Kazem concludes. The evolution of India's patisserie industry has been most noticeable in the last decade. A generation of young chefs, trained in the finest culinary schools across the world, have returned to set up avant-garde bakeries. They have adapted global techniques

and recipes to local and regional

ingredients, interweaving Indian and international flavours and techniques. Thus, they've created wonderful new offerings that have found an audience that is adventurous with the palate and willing to spend on quality. "When we started



happy to experiment with novel flavours like pistachio, berries, citron, activated charcoal, black sesame ... they are open to trying everything", shares chef Maxime Mon Tay of Cafe Monique, who bakes authentic French desserts like tarts, entremets, choux, babka, and Parisian flan, and has seen a steady increase in people's interest in embracing them.

Another ancillary development has been the growth in patisserie training institutions offering a world-class curriculum designed for Indian climates. "When we started



A Delectable Future The next few years will only

see more innovation and evolution – widening of existing categories, innovation in new ones, with new ingredients and techniques.

pastry school", shares Vinesh

Johny, co-founder of Lavonne

Academy of Baking Sciences

"The bakery segment is going to grow by at least 25% annually in the coming years", predicts Kazem Samandari. "The catch, however, is that only those who are really good will survive, because today's consumer is aware of quality, and only wants the best".

Johny - renowned worldwide for elevating the patisserie segment in India to a global level and taking India to the top in international forums and competitions – forecasts the Indian patisserie sector business will see immense innovation in niche products focussed on specific diets. "A recent masterclass I conducted with Richard Hawke focussed on the vegan, gluten-free and plantbased dessert segment", he says. This, according to him, is the next big thing internationally as well as in India. "There is a lot of conversation around lowsugar, eggless, plant-based, and

## Focus Areas for the Baking and Patisserie Industry

Action Points - The Indian love for all things baked is clearly as strong as ever both at home and when eating out. Indian consumers will enthusiastically embrace baked goodies and pastry in the years to come. The industry should brace itself for a long and happy period of *rapid growth and evolution*. There will be more innovation and evolution of established offerings from European and American baking traditions. To be noted, however, is the growing consumer interest in exploring new global baking cultures, such as that of the Middle East. The magnetism of food with a side of history and storytelling is undeniable, and industry players should invest in R&D and innovation that brings out these aspects and celebrates traditional local and regional foods.

The focus on health and mindfulness will also drive parallel demand in the alternative dietbased category like no- and low-sugar, eggless, and gluten-free offerings, all of which will create opportunities for category related ancillary industries. Demand will grow for more improved and specialised equipment like dehydrators to make varied natural coloured powders and flours; category-specific ingredients like gluten-free and local grain based flours; and nuts, seeds, and berries to enhance nutrition, flavour, and texture naturally. There will also be an increased demand for books and courses targeted at knowledge and skill enhancement in alternative diet baking.

#### and Pastry. "In the process we were able to collaborate with the finest chefs across the

world for our classes and train hundreds of fine pastry chefs within India".

gluten-free products now, so we have to keep working towards newer techniques, use great ingredients, and keep innovating to meet that demand", he observes. "The only thing I feel is not okay is artificial colours and flavours. Except that, we are open to giving customers all they demand".

The sentiment is shared by chef Maxim Mon Tay and Shivan Gupta of Monique who report a steady growth in their business despite opening in the middle of the pandemic. "I feel that people now want authentic experiences and are ready to go the extra mile", observes Mon Tay. "In the coming months, the demand for specialised offerings – whether local or international – will only arow further; customers have evolved across segments, and they understand and demand great products", adds Shivan.

This demand is not lost on chef Shriya Shetty who grew up in Mumbai but moved to her ancestral city Mangalore, where she recently opened doors to Buttercream Co., a patisserie and bakery where she aims to revive and celebrate the age-old flavours of the region and synergise them with the modern pastry segment. "With Buttercream Co. we are trying to marry the traditional, classic and quintessential local flavours with the finest baking techniques". Customers, even in tier-2 cities, she feels, are ready for the next step and open to embracing new flavours if done right. If the more-thanenthusiastic response from millenials and Gen 7 to her innovations with the traditional local offerings like the ghee cake and Mangalore buns are anything to go by, then many can take a leaf from her book.

While baking may not have been a native Indian concept. it has come to be an intrinsic part of Indian cuisine. And while the industry has travelled an interesting journey over the past few decades, baking in India will truly come into its own in years to come. And the Indian consumer is ready for everything delicious it is set to put out!



## SWEETS AND DESSERTS

India has a deep, long-standing relationship with sweets that borders on obsession. No wonder then that the sweets and desserts vertical has grown into a vibrant segment across consumption categories and meal formats. The Indian consumer today has a wide variety of sweet offerings to pick from, ranging from Indian mithai, cakes and pastry, to chocolate, ice cream, and more. Sweets are no longer limited to a post-meal indulgence but have quickly expanded into the breakfast and sweet snacks space as well.

Dive into our expanded Sweets and Desserts section to see our expert panel forecast for the segment in 2023.

## **Toolkit For 2023**

'Instagram-worthy stories' will be eagerly consumed, and there is nothing more alluring than sweet offerings. Content creators and brands can get creative by experimenting with content driven by nostalgia and food theatre, showcasing #MithaiHacks, #BTS (behind the scenes) explorations of *legacy mithai wallas* and *opulent food theatre-driven* posts highlighting the decadence of real ingredients. Chronicling and immersive curriculum-driven courses into mithai history and traditions are areas for exploration in food studies.

\_\_\_\_\_



## Section At a Glance

The sweet lover of 2023 is craving new flavours and experiences. This is the year for industry players to experiment with offerings. Traditional *regional mithai offerings* and *food theatre that deconstructs techniques* will attract eyeballs. Aspirational home baking has hobby bakers experimenting with Arabian and Middle-Eastern inspired offerings like Baklava and Kunefe. While thrill seeking consumers are open to experimenting with *complex* layered flavour notes that pair sweet with spicy, umami and even fermented notes, baking workshops, *mithai walks* and *dessert degustation* menus offer opportunities to engage consumers. With individual choices driving purchase, portable, *single-serve* and individually portioned sweet options offer rich picking, too, allowing producers and consumers to experiment with new flavour propositions. The homegrown *bean-to-bar* chocolate segment continues to grow, while *cookies* with their portion sizes and versatility are a rapidly growing segment that spans across indulgence and health verticals.







# TRENDS IN THE SWEETS SEGMENT

Sweets are potentially the most dynamic of food categories in India, loved universally in all their forms. The dining out sector will invest significant resources and energy into their sweet offerings, and consumers will go to restaurants specifically for signature desserts. The dining-in sector has taken the sweet game up several notches, with home bakers, home chefs, pastry chefs, legacy mithai wallas, and confectioners developing cult followings for their creations.

Consumers will be mindful in 2023 - thanks to re-prioritized objectives towards health - and practice cautious consumption through the year. This reflects strongly with our panel of experts weighing in heavily on *desserts with healthier claims*, both at home and when dining out. However, Indian mithais will never really lose their place in Indian hearts, and there will be a proverbial loosening of the belt around festivals. Our experts predict that *high-end, gourmet mithai* will continue to see innovation in 2023.



would add nuances of flavour, too.

People are veering towards unique, home/ signature creations. Artisanal/handmade desserts are FINALLY getting the recognition they deserve!



The possibilities to innovate with desserts is insane (we do our bit as well), and people are choosing healthier options, but sugar isn't going to disappear as the alternatives are always a compromise for taste.



Refined sugar has been a major health disruptor. But people have realised it can be substituted with other natural sweeteners. It may require out-of-the-box thinking to incorporate local sugar substitutes beyond jaggery from different regions of India, but it \_\_\_\_\_ Chef Amal Farooque Exciting times are coming. The patisserie segment will experiment a lot more. Consumers want new, bolder, and bigger flavours. And catering to these choices makes it so interesting for us, allowing us to be uninhibited and bold in our offerings. \_\_\_\_\_ Sanmish Marathe 



healthier claims



45% Gourmet/high end mithai



Mithai will never lose its charm for the Indian consumer. A growing awareness that they have been unnecessarily vilified as unhealthy in the past, as well as the consistently growing interest in regional food, has brought Indian mithais back into focus.

Health and lifestyle being a concern, special *diet versions of traditional mithai* will be in demand and drive innovation in the segment. A significant percentage of our panel also sees a rise in interest in hyper-regional sweet offerings in tandem with the excitement around regional cuisines. Our panel is equally excited about gourmet mithai that adds modern twists to classics.



Diet versions of traditional mithai



Gourmet/high end mithai



Rising interest in hyperregional sweets



Chef Shagun Mehra

Indian sweets were always a good balance of sweetness and nutrition, not using a lot of flour (mainly maida), but ingredients that would augment overall dietary requirements. So consumption of such Indian sweets should be a auilt-free trip.

end desserts is key!





We associate food with our best memories. That motichoor ladoo we ate sitting in our grandmother's lap; the milk cake we fought over and gobbled as soon as friends looked away. That gulab jamun or moong dal halwa that always found space, no matter how full we were! We crave those happy memories. Hence, the Indian mithai will resurge in a gourmet avatar∙ We don't hesitate to pay 100/150 bucks for an above-average doughnut. So, why shy away from paying 90 bucks for a good mithai?

\_\_\_\_\_

Indian mithai has such great potential! Each

recipes. To convert these into gourmet, high-

------

Indian state and community has its own

The Indian mithai industry is seeing a resurgence. Consumers today want traditional mithai that is contemporary, relevant, fun, and conscientiously made · Parallely, there is an artisanal or gourmet mithai revolution underway, with Indian mithai wallas attempting to help consumers experience mithai made with purity and honesty, complexity in flavour, derived from high-quality, natural ingredients and small-batch handcrafting.



Chef Girish Nayak



Ice cream has always had a special place for everyone, which is no surprise with India having such a rich dairy culture, and the segment has seen a fascinating upward trend curve in recent years. No wonder then that a market once dominated by Vanilla, Chocolate, and Strawberry has evolved to today include Indian-inspired flavours as well as global offerings like gelato, fro-yo, sorbet and more.

Our panel of experts forecasts a growing interest in *gourmet and artisanal ice creams.* Ice cream offers limitless possibilities for innovation as well as personalization down to a single serve, and the panel predicts a *rising demand for clean ice cream.* Equally in demand will be a variety of *specialised diet*friendly options such as low- and no-sugar, protein-fortified, vegan, and much more.



in the category.

I think dessert is a guilty pleasure that is now into experimentation. That said, homegrown ice cream brands in Bengaluru are here to stay; people are ready to spend and want more imaginative tasty flavours.



and nolen gur.

I think ice creams are currently the most popular desserts experiencing a revival as better quality milk and more niche ingredients make it possible to experiment with flavours. On the flip side, those that indulge regularly will look for healthier dessert options and gravitate towards options that have the flavour without the calories.





The Indian love for all things baked stays strong. Cakes and pastry have always been an indulgence in India. This segment of sweets has evolved greatly over time.

With consumers being exposed to various pastries and cakes, and pâtissiers and bakers more than delighted to deliver, there is a marked rise in home consumers experimenting with the segment in their kitchens as well, and the variety of pastries they are cooking up is expanding to include global offerings.



South East Asian bakes



Turkish/Middle Eastern baked items



European pastry and desserts



Home baking after the pandemic has become more advanced and is moving towards more aspirational desserts. People are more open to experimenting with different styles and flavours.

Social media has widely broadened the perception of how sweets and cakes should look and also how they should fit into low-sugar, glutenfree, Keto or other specialised diets. This has encouraged a spurt in growth of homepreneurs catering to these requirements via home delivery.



Zeba Kohli



Sarkar

A number of small-scale food producers are already doing naturally-sweetened desserts, but their reach is smaller due to absence of funding. Perhaps the bigger producers in the market could lend support, but without diluting the quality of products.

Middle Eastern desserts are so close to Indian mithai, and we derive so much from the Mughlai desserts anyway, it only seems natural to gravitate towards the richness of a good Baklava or Kunefe· Also single portions will become more popular as people — thanks to our value-formoney mentality — will drive us to look for more calorific and wholesome options.



Chef Kunal Arolkar



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# HEALTH, HYGIENE AND LIFESTYLE

# THE ENDURING MAGIC **OF MILLETS**

2023 has been declared the International Year of Millets by the United National General Assembly. While millets were a key component of the Indian thali, and have been mentioned in ancient texts, they disappeared from the Indian plate in the mid-20th century. They've made a comeback in the last decade, with consumers becoming increasingly aware of their health benefits, and food businesses creating exciting new millet offerings. This year, the Health, Hygiene and Lifestyle millets are now becoming increasingly popular and the trajectory they will take in 2023.







Millet flour is used to make rotis of various kinds across the country. In Karnataka, rottis made of jola or sorghum and ragi or finger millet are staples, especially for breakfast and lunch.



Traditional millet-based fermented drinks are popular across India, North-East, and East of Chhang is traditional to traditional to Himachal Pradesh.



## SIKIYA KHEER

Sikiya Kheer is a sweet preparation made by the Baiga tribe in Madhya Pradesh. It is made using Sikiya, an uncommon minor millet they grow, which resembles wild little millet, but with even smaller grains.



Raab is a special gruel-like winter drink made with bajra or pearl millet, traditional to Rajasthan and Gujarat. Rich in micronutrients, it builds immunity and strength, especially for children and new mothers.

## TRADITIONAL MILLET FOODS



particularly in the North, India. Finger millet-based the Himalayas, while Sura made from Kodo millet is



## ► MILLET PANCAKE MIX & NOODLES

The food industry is innovating with millet-based pancake mixes, ready-to-use instant millet mixes and batters for dosas, parathas and more as well as new products like noodles and pasta made from little millet and foxtail millet.

## NEW MILLET BEERS

Brewers are using bajra, ragi, and other millets to introduce new dimensions of flavours in their ales and lagers.



#### BREAKFAST CEREAL

Breakfast with a health quotient is a promising market in which food companies are reinventing millets, particularly ragi or finger millet, with breakfast cereals, millet muesli and smoothie mixes in contemporary flavour profiles.

# ► CHILDREN'S FOODS

Much innovation is happening with modern takes on traditional millet-based offerings for expecting and breastfeeding mothers, infants, children, including baby food, snacks, porridge mixes, and more.





# THE ENDURING MAGIC OF MILLETS

Millets were once a mainstay of Indian culinary culture — they've been mentioned in mythology, folklore, and historical texts. But, over time, they were sidelined and lost prominence on the Indian plate. With the growing awareness around the benefits of propagating millets for human consumption, animal fodder, and the environment – not to mention 2023 being the International Year of Millets – are these super grains finally going to get their due?



*"My fondest memory* of millets is of my grandmother making Tizann. a Goan

breakfast made from ragi, milk, and palm jaggery. I didn't know it back then, but I was consuming millets from an early age and loved their earthy and rustic taste", recalls Dr Tatvana Dias, CEO, Veruschka Foundation and Co-founder. A Bite Better. A Bite Better is a social enterprise and livelihood initiative that markets 'Heartisanal' millet and ancient grain-based food offerings prepared by an inclusive team of abled and differently-abled chefs that graduate from the Foundation's Culinaris Cookerv Institute.

Resurrecting and innovating with millets to make them more mainstream is one of the core propositions of A Bite Better, and small successes bring a lot of joy in the path the organisation has chosen. "Another happy moment was when we perfected a Christmas Fruit Cake recipe with millets and no refined flour. The expression on our customers' faces was a mix of astonishment and relief at being able to indulge in a healthier, decadent option". shares Tatyana. A Bite Better is just one of many thousands of organisations leading the charge in championing millets.

2023 has been declared The International Year of Millets by the United Nations (UN) as part of the UN Sustainable Development Goals (SDGs) of Zero Hunger, Good Health, and Well-being, Responsible Consumption and Production

consumed by both the peasant

and Climate Action. Closer home in India, the objective is to promote millets as a key component of the food basket, which is a unique opportunity to bring change by spreading greater awareness around the benefits of growing and consuming millets, thereby increasing demand and production. This, in turn, it is hoped, will contribute to food security, boost nutrition. ensure livelihoods and incomes of farmers, eradicate poverty and improve quality of life, particularly in regions that are drought-prone or threatened by climate change.



#### The Disappearance of Millets

"Millets were an everyday staple until as recently as the Green Revolution" observes Saee Koranne-Khandekar, awardwinning author and culinary consultant. "All of my



grandmother's stories revolved around patting bhakris (millet

flatbreads) for meals. The millet used differed with the season and region - Bajra for winter; Rice, Ragi, and Jowar for the rest of the year. One also had millet-based and fermented (Ambil) porridges, khichdis, and Thalipeeth (a toasted multigrain flour mix). These are now becoming increasingly unusual, especially for urban families, but were once

and landlord", she adds. Up to 60 years ago, millets were cultivated extensively across India and were a staple part of diets and culinary cultures across the subcontinent. In fact, prior to the Green Revolution, millets comprised 40 per cent of all cultivated grains in India. However, due to the globalisation of agriculture, there was increased production of rice and wheat, along with commercial crops like oilseeds, cotton, spices, fruits and vegetables. And millets saw a decline.

But, these were not the only reasons for millets losing prominence in Indian diets,

according to Anitha Reddy, Associate Director of Sahaia Samrudha, a Karnataka-based organic farmers association working towards promoting ecological agriculture through the revival of indigenous seeds. The shift from millet consumption can be attributed to rising income levels and the Public Distribution System (PDS), both of which made the aspirational grains of rice and wheat more accessible.



"Factors such as insufficient domestic storage space, poor marketing facilities, and inadequate processing

techniques further depleted the availability of millets,

#### contributing to the reduction in *their consumption",* concludes Reddy, who goes on to share that Sahaja Samrudha has successfully conserved over 3000 varieties of paddy, millets, pulses, and vegetables thanks to their women seed savers who

have created 32 Community Seed Banks (CSB) to preserve traditional seeds. It has also developed farmer and consumer networks to popularise millets and their value-added products.

For farmers, millets offered low economic returns. Erratic rainfall patterns over several years disrupted harvest cycles leading

#### The Resurgence of Millets

The real change in the perception around millets has come in the last five years or so. The Godrej Food Trends Report first observed conversations around millets growing in 2018 when it forecasted that "Indigenous Indian millets are all set to be the 'hottest' ingredient on menus across all restaurant formats". As conscientious cooking and responsible eating gained traction along with conversations around sustainability and farmer welfare, millets continued to gain consumer attention. With

#### **The Health Factor**

From a nutrition perspective, and considering present-day lifestyles, millets need to be widely incorporated into diets so they can plug nutritive gaps and help deal with current-day lifestyle ailments.

"In the past five years, millets have been rightly proposed as a magical solution to all our lifestyle issues. They are in fact, an extremely healthy addition to our diets", shares Monika Manchanda, Chief Culinary Officer and Co-founder, *LiveAltLife* – a health-tech startup that helps people with metabolic disorders like diabetes, PCOS, and cardiovascular health, restore health safely and naturally.

"Millets are not only higher in fibre and lower in Glycemic they also have micronutrients like Vitamin B, Iron and Calcium that make them a good grain option". Some, she goes on to add, even offer a decent protein percentage! Millets are a good category to include in diets. They help reduce carb overloads that are generally prevalent in Indian diets. "Honest, clean products like unpolished millets, millet flours, and dosa batters are products more brands should offer their customers to ease the introduction of millets into

to severe losses. These crops were easily replaced with more dependable options like cotton, maize, groundnut, and sovbean that offered better returns and consistently high-market prices. All this led to a further decline in millet cultivation and the disappearance of a valuable source of nutritional diversity.

Conversations around the role of millets in the Indian diet became trendy a few years ago, largely thanks to the regional cuisines they belonged to coming into the spotlight on social media. A slow but persistent call to bring millets back onto Indian

increasing recognition of their nutritional benefits and their impact on climate change, the hardiness of the millet is being appreciated, and governments - both state and central - have been promoting its production and consumption.

According to the ASSOCHAM report, *Millet - The Future* Super Food for India, today, India is the global leader in millet production with a market share of around 15% of the world's total production. In India, millets are primarily

plates added to their return. But conversations were still limited to specific dishes – like the Ragi Mudde (finger millet balls) of Karnataka, Jowar rotis (sorghum flatbreads) of North Karnataka, Jhangora Kheer (barnyard millet milk pudding) of Uttarakhand and more.



cultivated in 21 states with an area of 12.53 million hectares, producing 15.53 million tonnes and yielding 1237 kg/ ha. The impetus for millet cultivation continues to be driven in Karnataka. Andhra Pradesh, Tamil Nadu, Kerala, Telangana, Uttarakhand, Jharkhand, Madhya Pradesh, and Haryana. Odisha, too, has made major strides since the implementation of its Odisha Millet Mission programme in 2017.



Index (GI) compared to most other grains,

diets", observes Manchanda, That said, she feels other aspects should be considered, such as lifestyle diseases like diabetes and PCOS that are at epidemic levels in India. "An underlying cause is insulin resistance, which commonly occurs from a prolonged intake of processed and high-carb diets. "But when it comes to reversing insulin resistance, millets are probably equivalent to wheat or rice". Carbs in millets range from 60gm/100gm to 71gm/100gm which when compared to the 78 of white rice and 76 of brown rice and 71 of whole wheat offer a variation of just about 10%. "While it does make a

difference, using millets to fix an epidemic diabetes problem may take a while". Her advice to prevent lifestyle diseases is to aim for a diet that incorporates millets, along with a balanced intake of proteins, vegetables, fibre, and more.

Dr. Khadar Valli is of a similar opinion as Manchanda's. He is an *independent forest* agricultural scientist and food expert. renowned in Andhra Pradesh for his work with millets. To encourage

their natural cultivation, he propounded a method called Kadu Krishi (Jungle Farming) that is extensively used in Karnataka, Andhra Pradesh, and Telangana. His thoughts on the consumption of millets are documented in a freely available online book called *Siridhanya* by M Baswaraj, a millet farmer in Mahabubnagar, Telangana. Some of his suggestions include the use of five major millets -Foxtail, Little, Kodo, Barnyard, and Browntop millets - in the

form of idli, dosas, snacks, sweets, and savoury foods. But he advises not to mix millets, but to use them individually, as each has different health benefits.



#### **Making Millets Mainstream**

As a dual-purpose crop, millets serve both as food and fodder, thus providing livelihood and security to a large number of people. Incentives to allot a portion of every farm to grow millets would be a great way to increase both their production and consumption.

The resurgence of millets in both large- and small-scale farming is visible, especially in organic farming. Interestingly, some small farms even offer experiential tours to help spread awareness around traditional farming wisdom. MharoKhet, a 40-acre farm in Jodhpur, Raiasthan, is conserving and propogating over 100 indigenous, native, and exotic crops.



"We actively grow Bajra and Jowar. Millets give seed-toready-harvest crops in just 60-70 days. Their short

growing season allows us to use them as intermediary crops during our multi-cropping cycles in the fields", shares Rajnush Agarwal, Founder, *MharoKhet.* Offerings such as that of MharoKhet help put millets on consumers' radars. promote sustainable tourism, and encourage exploration of culinary traditions and culture. As a farm that grows all its produce and offers culinary experiences, Agarwal elaborates that MharoKhet uses millets extensively in their F&B offerings including in contemporary renditions of

regional recipes, "Our Millet Basil Congee on our regional Indian cuisine menu is inspired by a Rajasthani Raab and made from Bajra fermented overnight in buttermilk, then flavoured with fresh basil and cooled into a thick congee-like texture". Similarly, the world cuisine menu offers a version of the Israeli Matzah, an unleavened flatbread made of Baira instead of the traditional flour.

In addition to creating

awareness, the need of the hour is to ensure higher demand from consumers. Says Khandekar, "At the risk of sounding boring, I think we should first learn how millets are used traditionally, and that will show the way to innovation! I have always used millets in my work, be it in my progressive Marathi food pop ups, restaurant menus, or product portfolios. Not because one wants to ride on a wave but because one truly believes in millets and their significance in our cuisines".

Millets can be temperamental to work with and difficult to chew - another reason easier-toconsume grains sidelined them. However, there is a consensus that with modern technology and innovation, millet-based products will be a booming part of the packaged food industry in the years to come. "One way of making millets more attractive to consumers is to innovate with them and create products that

smartly, without compromising on the taste and nutritional benefits. As more people start seeing products that fit in with their preferences and blend easily into their lifestyles, there will be a more widespread acceptance for these grains", observes Prashant Parameswaran.

Managing Director & CEO, Tata

Consumer Soulfull Pvt Ltd.

incorporate them

With rich expertise in ancient millets like ragi, the brand operates in the health and wellness-focused food segment and boasts an extensive portfolio of milletbased products ranging from healthy snacks and muesli to plant-based protein drinks. Parameswaran adds, "We see millets being incorporated in a variety of ways across the spectrum, be it in breakfast and snack options, meals and health drinks or desserts. Incorporating millets into daily meals is no longer just a trend. They are becoming increasingly noticeable both in the home and on restaurant menus".

Hospitality institutions are also adding to the conversation. Kerwin Savio Nigli, Head, Department of Hotel Management, Christ University, shares "We include millets



in the practical training sessions on mother cuisines regularly.

We also do events that focus on and showcase millets. A few years ago, we conducted SAFAR. an event that showcased 82 innovative millet dishes. We also regularly invite experts to talk with our students. In keeping with the UN declaration of 2023 as the International Year of Millets, we have a series of events revolving around these super grains", he adds.

P Ravi Kumar, MD, of Tamil Nadu-based Moon Foods.

#### **A Million Opportunities**

A wide range of stakeholders has engaged in the millet movement, from the government to farmers, restaurateurs and chefs, food innovators and even social media personalities. The Millets and Organics International Trade Fair in Bengaluru held in January 2023 offered a glimpse into the many entities invested in taking millets forward with over 110 companies participating, including an international pavilion. The Central Government agreed to release Rs. 25 crore to establish the Millet Incubation Centre in the University of Agriculture Sciences.

Innovation is key to introducing millets in various ways to

#### Focus Areas for the Food Industry with Millets

Millets are clearly the future – both from a nutrition perspective, considering present-day lifestyles, as well as for the environment. They need to be widely incorporated into diets so they can plug nutritive gaps and help deal with current-day lifestyle ailments. In addition to government push, agri-industries and startups can promote millets by innovating to take the difficulties out of millet preparation and cooking. Convenience being a primary motivator, for the urban Indian consumer, *ready-to-eat millet-based products* will enhance the value and market price of millets as well as create employment opportunities, especially for women.

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Consumer interest in exploring *new flavours and cuisines* can be leveraged by offering millet dishes from global and regional cuisines, substituting millets for more mainstream grains like rice in classic dishes. The industry could invest in studying traditional practices around growing and cooking millets and apply *knowledge and skill enhancement* to the regional and global use of millets to convert them into viable propositions that offer *nutrition and* convenience, with investment in R&D and innovation. The focus on health and mindfulness and demand in the alternative diet-based category will offer much opportunity to innovate with dishes and menus built on millets for vegan, plant-based, and health boosting offerings.

healthy snacking and traditional dishes are one way, millets to brew beer has also been experimented with. Pune-based Great State Aleworks worked with bajra, ragi, and jowar to create beers like the ragi pineapple ale and the bajra ale. In 2022, Mumbai-based Drifters Microbrewerv launched their limited edition Millet and Rice Beer, a dry hopped lager beer made with Bajra (Pearl Millet) and rice. With the flavour profile being close to that of wheat or barley, such beers become easy to introduce into the market. It was during the Millets & Organics International Trade Fair that Shri B Sharat, Commissioner for Agriculture

concurs that easy to consume millet-based products are helping bring the grains back into diets. "Over the last 15 vears since we have been in the business of creating millet products, we have seen a 10X increase in demand. Our millet-based noodles, cookies, and vermicelli are amongst the top sellers from over 100 products". Foxtail millet, Little millet, and Barnyard millet sourced locally from within the state see most popularity, he make it a mainstay, and while

shares, concluding that COVID was also a driving factor in increasing awareness around the health benefits of millets.



in Karnataka, said, "India popularised yoga from the Vedic times to the entire world. In the same way, it is time for India to take the lead on spreading awareness about the importance of millets to the world".

2023 is the Global Year of the Millet, and with all the effort going into promoting millets, it looks like these super grains are finally going to get their due. But all said and done, it is consumers that need to make smart choices and do their bit in making this environmentfriendly, healthier alternative mainstream.

# HEALTH, HYGIENE AND LIFESTYLE

The average Indian today is more cognizant of their health than ever before. A positive fall out of the pandemic has been that consumers are particular about what they are consuming, where their food comes from, and how it impacts the environment. In 2023, consumers will continue to look at health and hygiene as the mainstay of their decisions around food and drink. And retailers and the HORECA industry will continue to innovate and create to meet these demands. Homegrown will be a top consideration in 2023 with the made-in-India movement gaining consistent traction.

Read on to see what our experts have predicted in Health, Hygiene and Lifestyle for 2023.

#### **Toolkit For 2023**

Millets will, of course, be a big content driver in 2023, but content creators and brands can get creative by experimenting through Instagram-worthy stories that showcase desi local ingredients and dishes made with them to leverage the interest in the regionality, diversity, and plurality of Indian cuisine. Old is new again, and drawn out stories of traditional *regional Indian* foods and foodways will continue to garner attention. Innovative health-related information and recipes from global cuisines will be well received. Another area that will garner much goodwill will be *sustainable gastro tourism* for food studies.

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#### **Section** At a Glance

When it comes to health, hygiene and lifestyle choices, the diner of 2023 is clear about their preferences. The interest *in local, seasonal, and native ingredients* and awareness around farmers' livelihoods will continue to drive consumers toward **community-supported agriculture** initiatives. The focus on health is evident with diners becoming particular about the cooking mediums used at home and in restaurants and an increased leaning towards *desi oils over* imported options.

There is endless opportunity for the industry in this segment in 2023. Chefs, restaurants, and small businesses should invest in exploring cooking mediums, *locally-produced premium nut/seed oils* like hemp and walnut *to make pestos,* dips and finish salads, while premium ghee varieties offer a chance to innovate with classic and new menu offerings such as *innovative tadkas*.

Nutritionists and health food producers can leverage the continued interest in specific lifestyle-based diet menus, and get innovative with alternate diet foods. With hygiene being foremost since 2020, the demand for *clean, hygienically*packaged meats and seafood is unabated and more resources towards higher benchmarks in these areas will be very well received by conscious consumers.







# HEALTH, HYGIENE ANI LIFESTYLE TRENDS IN HOME KITCHENS

In the wake of the pandemic, health, immunity, mindful eating, and psychological well-being continue to be top of mind for consumers. They are cognizant of the ingredients they are cooking with and where they come from. They are also becoming aware that Indian cuisine is a complex food matrix of constituents that interact with one another to deliver health and boost immunity.

No surprise then that our panel foresees that this will drive *increased attention to local, seasonal*, and native ingredients. The awareness around farmer livelihoods will continue to drive communitysupported agriculture. With the increased awareness around hygiene since 2020, there will be consequent demand for clean, hygienically-packaged meats and seafood.



Segregating garbage, reducing consumption, dangers of plastic waste, farm-to-table are all purely a 1% phenomenon  $\cdot$  We don't have enough evidence to show that the largest dining-out sector - middle-class India - cares about such sustainability trends even now· The difference will only come when they start.

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Hyper-local ingredients, seasonal produce, and zero waste are not difficult to incorporate. There has to be intent and synergy with farming methods.



The current interest in India's incredible diversity of produce and microcuisines will unleash the power of various nutrients that become available when we eat more diverse produce and focus on local and seasonal ingredients. Communitysupported agriculture rewards our local farmers and helps preserve local produce.

Farmers connecting directly through social media or local farmers' markets, will be preferred by consumers looking for fresh and local produce and transparency in the supply chain. More consumers now want a clear throughline to the source of their produce, not muddled and obfuscated by a chain of middlemen.







Ravi Miglani



Local, seasonal and native ingredients



Community-supported agriculture



Clean, hygienicallypackaged meats and seafood



Ayurvedic ingredients and practices

# HEALTH, HYGIENE AND LIFESTYLE TRENDS IN RESTAURANTS

The HORECA industry is dealing with a very discerning diner today, one that is exposed to a world of information, especially when the focus is on health and hygiene without any compromise.

With so many home chefs breaking the mould when it comes to regional food, and the demand for India's rich, hyper-local cuisines set to grow, our expert panel finds that 2023 will see an *increased* consumer demand for regional cooking mediums. The continued focus on health will have diners looking out for specific lifestyle-based diet menus, which will drive innovation in the space of alternate diet foods. Plant meat already made a splash in 2022, and vegan cheese and plant-based dairy will see commensurate demand in niche establishments.



Increased demand for regional Indian cooking mediums



Specific lifestylebased diet menus



Alternate foods (Vegan, faux meat, plant based)



Clean, hygienicallypackaged meat and seafood



There has been a remarkable increase in demand for health-boosting ingredients to make juices and smoothies, such as kale, celery, and wheatgrass. Consumers are opting for a variety of lifestyle diets like Keto and Vegan, and seeking exotic ingredients to amp up salads and stir-fries.

Gluten and lactose intolerance are VERY REAL. For years, they were considered a farce in India. But, it's a painful way of living. Inclusivity should be the focus for chefs this year. To reach more consumers, create menus that cater to everyone's needs∙





Sustainability, energy conservation, and local farming will take centre-stage as stakeholders and consumers increasingly demand ethical dining practices. There is also a need to incorporate healthy ingredients in our diets for general well-being.

Composting is mainstream and a welcome change. We like feeling good about our choices, and these small acts make us feel like better humans. If nothing else, at least for that, people will adopt more environmentally friendly kitchen habits the beginning of a more sustainable food culture! \_\_\_\_\_



Dr. Poorvi Bhat



Health, nutrition, immunity, and environmental consciousness all play a significant role in choices when it comes to ingredients used in home kitchens. Dietary fats and cooking mediums being the cornerstones of cooking in any home, they will always register change.

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The post-pandemic consumer is well-informed and aware of the ingredients on their plates, and our panel predicts they will both experiment and spend significantly with various cooking mediums based on hot and cold cooking. The increasing focus on regional Indian flavours will see consumers opting for traditional desi oils over imported options for Indian cooking. But locally-produced premium nut/seed oils like hemp and walnut will see a rise in demand as exciting new gourmet flavour propositions.



Five years ago, Indians wouldn't have thought about using Avocado oil· But today, considering the Internet, data availability, health-conscious consumers and the desire to shift to healthier alternatives, industry players can tap into this market, backed with research, to fill the supplydemand aap.



about expiry dates.

Basu

People will experiment with new products. They have also become conscious of eating good fats! Avocado and other exotic seed oils boast of higher benefits and improved heart health and are excellent sources of good fats.





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# MAPPING REGIONAL INDIAN FLAVOURS

KATU

# FOOD MEDIA AND STUDIES

# EXPLORING A LEXICON OF REGIONAL FLAVOURS

Western vocabulary has been used to describe and define elements of Indian cuisine for eons. However, every aspect of flavour has a variety of shades in India, and Indian regional languages have evolved into a plethora of words that enable us to describe flavours in every shade and texture with far more depth, nuance, and specificity. To chronicle Indian cuisine with some degree of accuracy, those studying Indian food should consider expanding the Indian lexicon of flavour that draws from and builds on the diversity of the regional languages of India.

This year, the Food Media and Studies section examines and offers methods to research, document, and showcase regional Indian cuisine with more accuracy to do its plurality and diversity justice.







# **EXPLORING A LEXICON OF REGIONAL INDIAN FLAVOURS**

With Indian cuisine in focus, both globally and locally, there has never been a better time to engage in chronicling Indian culinary culture.

The Indian food industry began a journey of inward exploration in 2018 when the Godrej Food Trends Report first observed interest in regional cuisines begin to grow. It went on to flourish year on year until the pandemic came along and sharpened focus on these conversations, sensitising Indians to their culinary heritage, and catalysing deeper, more conscious, interactions with their food.

Food has a unique and powerful ability to transcend the plate into varied dialogues and media. As we look forward to 2023 and beyond, Indian consumers, food producers, home and professional chefs, restaurateurs, writers, journalists, publishers, academicians, artists, content creators, and even food tech startups are working to document India's culinary heritage in unprecedented ways.

#### India, a Soft Power Player

At a global level, India's image has been growing exponentially. In addition to being one of the fastest-growing entrepreneurial economies, India with its ever-growing diaspora, is also acquiring a reputation as a soft power player. "India's soft



power is our cuisine and its sheer diversity, and the power of our history,

plurality, and continuity. And I'm happy to see it finally valued for being authentic and unapologetically true to itself", shares Masterchef India Judge and celebrity Chef Vikas Khanna with pride.

According to Khanna - one of India's most celebrated culinary ambassadors - a global cultural shift in the perception of Indian cuisine has been underway over the last twenty years. He elaborates that this shift began

subtly, lacking any authoritative dialogue to define or demystify Indian food to the world, but it has gained immense momentum in recent years, and finally seems to have thrown off stereotypes to be recognized for its nuanced complexity. "Today a whole generation of Indian chefs has risen, bringing authentic Indian cuisine to the centre stage - on TV, in books, and at restaurants. Indian cuisine is now earning accolades in the Michelin and Zeitgeist guides and The New York Times", lauds Khanna, "and I am so proud to see India's regional cuisines being showcased".

The COO of Bellona Hospitality Services, Prashant Issar, observes, "The confusion that was fusion is evolving into a smart modern take on Indian cuisine! And it is

being driven by a generation of new Indian chefs, in tune with their global counterparts, who are deep diving into studying cuisines, ingredients, and techniques, and marrying global and Indian cuisines far more intelligently than ever."

He goes on to share that the Indian food Industry has also come out of the pandemic far more resilient and raring to go! "India is perfectly placed to leverage the attention of the world, today. We are perhaps leading the revival of the global food industry."



#### Many Countries and Culinary Cultures in One

But can Indian cuisine be viewed as a monolith? There is an undisputed and growing interest in profiling regional cuisines and chronicling the diversity of Indian food. What measures should those attempting to do so take to do it with some degree of accuracy?

What makes a meal North or South Indian, or Bengali, Kashmiri, or Khasi? These questions typically inspire a list of signature spices or dishes used in the cuisines, but these present an inadequate image, almost a caricature of a cuisine presenting only primary features in broad strokes rather than a detailed illustration

This is because cuisine profiling is easily confused with flavour profiling. A flavour profile is characterised by a set of basic spices, seasonings, and aromatics, and is effectively

just one aspect of the cuisine profile. A cuisine profile, on the other hand, is more complex and is based on a style of

**Geography Beyond Boundaries** 

To truly understand any cuisine, it is important to understand the context within which the cuisine has evolved. In India, we tend to define regional cuisines based on the political boundaries that define said regions. However, regional and micro-regional cuisines are more a reflection of physical geography and time. rather than political boundaries.

Masterchef Judge and Celebrity Chef Ranveer Brar, like many in the food space, believes that the definition of regional cuisine needs to change.

#### **An Atlas of Ingredients**

Physical geography plays an intrinsic role in defining a cuisine at multiple levels. It begins with ingredients from the land and water bodies of a region: the grain, beans, vegetables and fruit, animal proteins, cooking fats and flavourings like herbs, spices, sweeteners, and souring agents. These make the foundation that any cuisine builds on. Over time, this comes to include ingredients that may have been added, through influences of trade. exchange, migration, invasion, propagation, and evolving landscapes.

By extension, culinary cultures anywhere in the world evolve because of the specific natural resources they draw on. Where meat has been abundant, it dominates the plate: along coasts, seafood rules menus. India, by this measure, has long harnessed its richest resource: its plant biodiversity.

#### Layers of Culinary Cultures

Geography, biodiversity, and culture are further layered by aspects of history, ethnicity, religion, economics, social class,

cooking characterised not just by ingredients, techniques and dishes, but those that are associated with a specific

geographic region and/or culture. Setting this broader context is critical in examining a cuisine in its entirety.

"For the longest time, we have been carpet-bombed with a generalised idea of Indian food defined by political boundaries. But whatever prism you use to break it down by, the context for regional cuisines will always be the geography, agriculture, climate, and culture of a place", he points out. "And documentation must happen with a cultural, or I would even say, a micro-cultural lens that gives a fair representation of

Recognised as the 8th most biodiverse region in the world. India counts more than 1400 edible species of plants from 184 families in its culinary repertoire, and these are the foundation of cuisine rich in flavour, texture, and nutritive properties. "The beauty of



Indian regional cuisine lies in the flavours of the ingredients. In the

realm of vegetarian cooking. I have found that vegetables taste different in different regions of India. You can also taste the difference between heirloom and mass-produced hybrid varieties", points out writer, food historian and consultant, Pritha Sen.

This invaluable diversity is under threat of homogenisation and irrevocable loss. While plant diversity is driving conversations around local, sustainable, terroir-, provenance-, and

mixed cultures beyond how political boundaries have defined them till today". This is a valid argument, considering the fact that the political map of India is dynamic and evolving, whereas the physical version has stood the test of time, with climatic and microclimatic regions laid down by nature a millennia ago.



climate-driven eating, the intricate local food webs on which India's diverse culinary cultures are based are in urgent need of preservation.



"We desperately need to document foods that are disappearing.

Chefs need to invest in sourcing correct ingredients, not to be manic about authenticity but to represent the best inaredients from source. Students of food need to understand how food is grown, who grows it, and what it costs to bring it to the plate. And we all need to understand the 'backstory' of produce, recipes and the people behind them", emphasises Dr. Kurush Dalal, Archaeologist, Culinary Anthropologist and Museum Consultant.

and caste. It is a complex fabric that is not easily unravelled.

"It is very easy to fall into the trap of stereotyping a region's cuisine based on what is already widely known," points out Sen. "But one must dia deep to capture the nuances of a cuisine.

and understand how and why it changes from community to community". The authenticity of regional cuisine lies in the details, which the principles of mass cooking that professional kitchens follow can rarely do justice to. "Restaurants should only venture into it if they are ready to go that extra mile - real documentation is not easy. It needs academic prowess".

Indian cuisine as we know it today is the result of a flavourful iourney through millennia. And tracing this historical evolution is one essential factor in understanding Indian cuisine and taking it into the future. "We really need to understand where we're coming from to understand where we're going", points out Chef Ranveer Brar; "In examining any cuisine, food history will never be irrelevant".

ancient wisdom in our cooking and eating practices, which are unfortunately largely undocumented, some of which can still be be found in practice today, passed from one generation of cooks to the next, but with a limited understanding of the science behind it. Much of it is rooted in traditional knowledge systems like Ayurveda and Unani medicine that codified dietetics centuries ago and based food consumption on how the body reacts to certain foods in specific seasons. According to

Our food history also holds

Anushruti, recipe creator, food writer, nutrition expert, and creator at Divine Taste, "Ayurveda places a lot of importance on ritucharya (seasonal routines) and

dinacharya (daily routines). Ritucharya advises changing one's diet and lifestyle with the season. So as the routine changes, foods to be consumed also change".

Such knowledge systems rely on local produce from the land, draw on an innate understanding of the nature and function of specific foods, an ingrained sense of balance between ingredients with seasons and combinations within themselves, and specific flavour principles when cooking, all of which can be slowly unearthed as one digs deeper into the study of regional cuisines.

A prodigious amount of culinary detailed, however, the variability of Indian cuisine, which is extremely ingredient-forward and instinct-driven, creates

of recording paper-based, audio, video or others, we saw gaps in

interpretation - two cooks following the exact same textbased recipe usually come up with different results due to the subjectivity of the instructions", shares Prateek Vaid, Vice President, product and operations at CloudChef. A food tech startup, with technology at its core, CloudChef is creating a central repository of recipes that can be accurately cooked and delivered by CloudChefenabled kitchens anywhere in the world, with recipe owners receiving royalties on each sale.



#### The Road Ahead for Chronicling Indian Cuisine

While India has a rich and colourful history, cohesive efforts to chronicle India's culinary history and culture have been limited. What exists, in the form of written documentation, is in regional languages and fragmented. While some Indian states have attempted to create a culinary narrative to promote local tourism and economy, the impetus has largely been on the part of individuals and communities and continues to be so.

"Chronicling is a selfless act that will bear fruit beyond one's existence", observes Issar. "If the Ain-i-Akbari did not exist, we would have no knowledge of the food of that era. And since we are in the ever-turning hamster wheel of evolution, chronicling Indian cuisine is essential to keeping it relevant, and tie the past and present to the future".

While the movement to document Indian cuisine is growing, experts caution that it be approached with mindfulness. Dr. Dalal points out that chronicling of oral testimony is challenging, and emphasises that those attempting it "must have a completely open mind, shove preconceptions deep down, and put a stone on them!" He adds that building confidence

#### **Putting Together the Proposition**

For those in the business of mapping taste, India offers tremendous opportunities.

The HORECA sector is perhaps the one most pressured to deliver new and exciting propositions constantly, and regional cuisines offer a subcontinent worth of options if handled correctly, not just for the dining out sector, but also for the food and travel industry which is looking forward to a massive uptake in gastrotourism. Local and regional cuisine exploration has always played a significant role in tourist experiences but with

#### Scripting New Dialogues

A refreshing curiosity to learn. understand, and accept the diversity of India's culinary culture is already driving an exciting new script to be written. by a generation of chroniclers. And it could not have come sooner! "As family structures



change to more nuclear families and people move awav from their native

places, there is a real need to document the wav we eat. There is also a shift to embracing local, seasonal and fresh food iust like ancestors did not too long ago". observes Priya Kapoor, director of Roli Books, a leading publisher of Indian food and cookbooks.

Done right, this will carry Indian cuisine to new heights in years to come. But to do so it must be truly comprehensive and inclusive. "Food isn't merely ingredient, technique, recipe, and equipment," points out Dr. Dalal. "We desperately need to acknowledge politics, communities, and gender. We also need to talk about the food of the Dalits and the Adivasis. and we need to make sure we eat and let them eat".

wisdom lies in home kitchens with the unrecognised, true subject matter experts - the women. Not only are they bastions of home cooking, but they are also the repositories of generations of undocumented food knowledge. They have been instrumental in chronicling and passing on this knowledge down the ages, through oral history, mythology, folk songs and folklore, handwritten recipes, community cookbooks, and the modern-day home chef pop-ups of recent years. Sen believes that professional kitchens should look seriously at hiring more women cooks in their kitchens. "Women have always been the best propagators of regional cuisine, and this is not a feminist statement. It's in their DNA".

Until now, documenting regional cuisine from a commercial food business perspective has involved recording information through pictures, voice notes and video, to capture ingredients, recipes, nutritional information, flavors and textures. No matter how





in subjects, using multiple sources, and being cognisant that testimonies will vary is essential. "Don't worry about the discrepancies. Ask them for their memories, collate data, and go back to the source for clarification if needed. And always give credit where it's due."

According to Chef Brar, the authenticity debate is one that will prevail, and chroniclers should be prepared to address it. "The challenge with an accurate representation of regional cuisine will always be the question of authenticity. In India, we make one dish in many ways. We must figure out a macro purview that documents dishes in all their plurality without destroying their identity. I think it is up to us to collectively define the parameters of accurate representation".

Dr. Dalal, Chef Brar, and Sen concur that while it is wonderful that Indian cuisine has such a bright future, it must be nurtured with integrity, empathy, and foresight, to avoid insularity and appropriation. It must also respect intellectual property. "Chefs, especially 5-star hotel chefs, must consider bringing experts to accurately represent regional cuisines. But

travellers specifically making destination choices based on local food, the tourism, food. travel and allied industries can work with chroniclers and chefs to build lucrative offerings that showcase local markets, cooking classes, and cuisines, thereby also generating employment opportunities for locals.

The food media and publishing space offer promise as well. According to Kapoor of Roli Books, this is the best time for Indian books on food, culinary traditions, and history. She would know,

also give credit where it's due. and recognise the source of the knowledge", concludes Dr Dalal.

These are areas that CloudChef seems to be creating solutions in. "CloudChef eliminates the subjectivity of instructions to a point where even cooks with minimum context can recreate the recipe accurately", shares Vaid, who explains that the existing practices of recording of culinary data that have been limited to two senses - sound and sight - is being augmented by technology - sensors and software that Cloudchef has built, that enable the recording of taste, by ensuring accurate translation of ingredients and their potency across geographies using chemical or sensory tests, and creating a programming language for recipes that captures the intuition and intent in a recipe through sensor data. "Over the long term, CloudChef will serve as a repository for a lot of the world's culinary knowledge and preserve them through recordings on our systems", he concludes.



considering that Roli Books is poised to announce a regional cookbook series starting with The Goa Cookbook by Chef Pablo Miranda. "The idea is to document popular and forgotten recipes of each state in the country along with the context of why people cook and eat in a certain way", she elaborates, adding that "the past 4-5 years have seen an exponential rise in interest in books on regional cuisines coupled with a higher buying power." but cautions that although there is a market for cookbooks, they should be

sound in their editorial content as well as well-produced and beautiful

"The biggest challenge is to bring Indian cuisine, the way we eat it in India, to the western world. We have tried Indian cooking with all sorts of fancy twists to make it appealing to western audiences. But being inauthentic never worked for us. That restaurants showcasing authentic regional cuisine are taking centre stage and winning Michelin Stars today proves that. There cannot be a better moment for Indian chefs to be on the main stage than now", forecasts Khanna.

With interest and engagement in regional cuisines at an alltime high, recognition of the rich diversity India offers, government efforts to recognise and support indigenous foods through GI tagging and other initiatives, and the demand for information rising exponentially

across segments of the food industry, the stage is set for deeper discourse around local, sustainable, ingredient-forward, terroir, provenance, climatedriven consumption, and all aspects of Indian cuisine.



#### **Focus Areas for Chronicling Indian Cuisine**

For those in the business of mapping taste, India offers tremendous complexity, multiplicity, and diversity of cultures and cuisines. 2023 and beyond will see a rapid proliferation of F&B businesses across the country. Heightened awareness and interest in traditional food wisdom will accelerate food discovery at a hyper-local level. Food producers, writers, journalists, authors, chroniclers, publishers, academicians, artists, home and professional chefs, restaurateurs, video and television content creators, and even consumers are working to chronicle India's culinary heritage and culture in unprecedented ways.

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Action Points - The exploration of home-grown flavours and the rich diversity of our culinary heritage will grow exponentially, fanned by the legion of home chefs and mini enterprises poised to unleash a smorgasbord of regional flavours from their kitchens. This will spark deeper interest in indigenous ingredients, cookware, and more. Interest in lesser known regional cuisines such as that of Jharkhand, Chhattisgarh, and the North East will continue to grow. The industry should take note of the increased demand for knowledge and skill enhancement to research and document regional cuisines and convert them into viable propositions. The magnetism of food with storytelling and consumer quest for new tastes is something cloud kitchens can take advantage of in *planning menus and concepts* around regional cuisines. Publishing and food media platforms and social media content creators may want to consider content propositions like cooking shows and food and travel formats that showcase local ingredients, foodways and more from regional cuisines.

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# FOOD MEDIA AND STUDIES

Food is a serious business today. People have a growing desire to know more about food whether for appreciation, to indulge in as a hobby, chronicle, develop projects or propositions, pursue careers in food, or actively seek out culinary experiences for travel. In response, the food industry, too, is constantly reinventing itself by upgrading skills and knowledge. While courses and workshops have grown into valuable resources for food learning, food media has also been a great forum for education, knowledge sharing and fresh dialogue within the food space.

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In this section, we forecast developments in the food media and studies space in 2023.

#### **Toolkit For 2023**

The growing opportunities for culinary chronicling across media platforms means there will be a demand for food content, offering chefs, home chefs, and content creators fantastic opportunities to create content that offers specialised knowledge on regional cuisine and highlights their expertise. 'Instagram-worthy stories' that bring out details on *local dishes* and foodways will be eagerly consumed! Content creators and brands can get creative by experimenting with content driven by nostalgia around regional Indian cuisine, highlighting the *decadence of real local ingredients*. Sharing discoveries and research around *immersive* study of regional cuisines, through kitchen and menu experiments as well as inspired by gastro *tourism* will be areas to explore.

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#### Section At a Glance

With the industry needing to constantly reinvent and engage target audiences through a variety of content offerings across formats and mediums, the demand for food content will continue to grow exponentially. Especially with consumers increasingly interested in engaging with food beyond just cooking and eating, Across the food space the requirement for opportunities to study, chronicle, upskill, reskill, and pursue specialised verticals will only grow in 2023 and beyond.

2023 will be the year for food media, students of food, F&B businesses, professionals, and even consumers actively invested in learning to study food from EVERY perspective to explore, dive deep, chronicle and get experimental. Food enthusiasts will look for cooking classes, workshops and immersive sessions, while industry professionals will look to specialised knowledge acquisition and certification in areas like coffee cupping and mixology. This will offer teaching institutions commensurate opportunity to add new courses and *workshops* to address the demand. With a growing sense of entrepreneurship, chefs and food experts can diversify to offering workshops in their fields of *expertise* such as food writing, photography, styling video creation and more. With food media, the vote is in, consumers will gravitate to video content across platforms, be it short- and long-form video content or food shows on television and OTT. Interestingly, print publications are also seeing a resurgence. There is a significant rise in *independent and community publications,* especially *books* profiling cuisine and culinary cultures. For those in the industry who have any of these on their bucket lists, *this is the year to do it!* 



A continuing mindset of curiosity and exploration of food and food cultures, a quest for culinary adventure and a desire to discover unexplored flavours will drive the HORECA industry, scholars of food, and consumers who have spent significant time and energy engaging with food in the last few years to continue to study and learn about food in the wake of the pandemic.

Our panel forecasts that **food studies courses** that explore technical aspects of food writing, history, and science will attract all disciplines of those studying food. That said, there is some degree of variation in goals between professionals and individuals. Our panel foresees independent scholars and hobby cooks pursuing cooking classes and F&B appreciation experiences, like guided tastings, facilitated by the industry. Professionals, on the other hand, will look for skill diversification and specialized knowledge acquisition like coffee, mixology, or chocolate certifications. And finally, with food media taking off like never before, our panel predicts a rise in *independent exploration of food* through books and publications.



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There is increased visibility of learning options on offer in all these fields, both on and offline. Some highly focussed food-related topics offered on Zoom/Instagram are fully subscribed to in a very short time, and the discussions continue well beyond, in informal groups. 



designers in F&B·

Taiyaba Ali

F&B professionals are already specialising in craft liquor, spirits and wine, but I feel there is a need to focus on knowledge of nonalcoholic seaments like tea and coffee. At the institutional level, hospitality programmes will need to expose students to the latest trends in F&B. For example, looking at sustainability, technology to measure and manage food waste, and specialised subjects like food science, food processing and food technology.





Ponnapa

There have been so many informal food studies courses during the peak pandemic period that we are far behind in certified knowledge acquisition and looking at food skills as a legitimate course - so that should be on the radar for curriculum



Kerwin Niali



Food studies courses



Cooking classes and F&B appreciation experiences



Skill diversification and Specialized knowledge acquisition



Independent exploration of food through books and publications



Food has always been an attractive medium of entertainment. The pandemic brought food media into strong focus, and it stays so long after. The demand for food content continues to grow exponentially, and the industry is serving up a variety of offerings to savour across formats and mediums.

One of the top mediums of food media consumption in the last couple of years has been Instagram. From posts, to lives, to reels - consumers and the industry have used it to create a vibrant forum for culinary exchange. Our expert panel predicts that Instagram Reels and short-form video content will continue to rule in 2023, while the rise in gig economy and the burgeoning of content creators will see food video content continuing to find a large audience. Food shows on television and OTT will have to push for audience's attention but will manage to attract them with innovative offerings.





Food videos by independent content creators



Food shows on television and OTT channels



While consumers were excited to cook from scratch while working from home during the past two years, kitchen fatigue is real. In some ways, it will be more exciting to become voyeurs and consume content rather than sweat it out in the kitchen. 

The average Indian would prefer something handy while returning home from work. Content from content creators and websites are in the game again! Reels will continue to gain traction.



Chatteriee 



WhatsApp has tremendous reach. An individual with access to hereditary knowledge of family recipes or having a specific skill set can create their own audience through content creation. Personally, I am a voracious podcast consumer, and listen to culinary podcasts, amongst others, on a daily basis. 

2023 looks like a great year for content creators and food bloggers. At Curly Tales, India's no.1 Food and Travel platform, we have seen a sharp rise in consumption of short-form videos in 2022. Right from Reels to YouTube Shorts, our audience loves new food discoveries that we make and engage better with the short-form video format. Having said that, our long-form video IPs have seen an astounding engagement rate in 2022 as well. So I think, there is a market for both short-form and longform. I personally love short form. Because short form, is quick, info-packed, snackable content. 

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Kamiva Jani



While digital media exploded during the pandemic, print media saw a boost as well. Cookbooks, books on cuisine, and food academia are in demand, and production is on the rise. Not only have food publications moved beyond typical recipe books with publishers investing in high-value memoirs, anthologies, and more, but a whole host of creators are entering the fray with independent and selfpublished offerings.

Our panel forecasted that 2023 will be the year of resurgence for print media. More than eighty percent forecast the rise of **books profiling cuisine and culinary cultures.** Although the consumption of food content via digital magazines, publications, and cooking apps will continue to attract audiences, there is a fatigue setting in with screens, which will see consumers gravitating back to traditional print media with audiences returning to consuming content through periodicals, newspapers and magazines.



-----There has never been a better time in India for cookbooks and books on food, culinary traditions and history. We at Roli have always been partial to cookbooks. The past 4-5 years have seen an exponential rise in interest in books on regional cuisines coupled with a higher buying power to afford beautiful books. With India's rich and varied culinary traditions, this makes it a very exciting time for us as publishers.

Goya has been writing and publishing on food and culture for almost 7 years. It's been a thrilling but lonely space. We've had to bear the 'pioneer tax' of building out the industry as one of the earliest publications within this niche category in India. But 2022 was an exciting year because it marked an inflection point  $\cdot$  With the launch of Locavore, enthucutlet, and independent zines. The industry is surely growing. And this will push the envelope, build legitimacy, and attract bigger budgets. 



Enthucutlet came about because we at Hunger Inc. Hospitality wanted to create a platform for all the amazing stories about Indian food. Food is universal, and everyone has their own personal experiences and stories. We all love those untold tales, refreshing perspectives, and edgy opinions, especially about food. 

'Indian food' has always been a misnomer and a formidable cultural soft power that has

established itself on the global culinary map in the last few decades. For most of our history. we never documented our food. But the internet age has turbocharged food writers to blossom like the Valley of Flowers in spring and make up for the lost time. It is now the golden age of food writing in India - with every regional sub-cuisine being documented, curated, showcased and shared with meticulous detail. Given the sheer diversity of food in India, I expect this trend to continue to grow in the coming years.



Anisha Rachel Oomen



Krish Ashok



Books profiling cuisine and culinary cultures



Digital magazines, publications and cooking app

NEWSPAPER	
	40%

Food content in traditional print media

# CULINARY TRAVEL

# **TRAVELLING FOR TASTE**

Indian culinary tourism has taken off, and how! The desire for adventure on the plate is driving the pandemic-confined Indian traveller to travel with a vengeance! And two years of seeking excitement in food has them looking beyond typical tourist activities for specific culinary exploration! The age of the Indian gastro tourist is here and will stay well into the future. Observing this, not only is the food and travel section back, but it's bigger and deeper! We looked at destinations that will be popular for the Indian culinary traveller, and took a deep dive into the growth and possibilities with culinary tourism.

Read on to explore the evolution of this exciting sector, where it is headed in 2023, and beyond.





With a steadily growing interest in the culture and cuisines of the North East of India, this region has rapidly become the most popular destination for culinary travel in the last half-decade, and continues to remain top of mind.

## CHETTINAD - 43%

A region rich in culinary culture. influenced by the cuisines and ingredients of neighbouring kingdoms and countries, including Sri Lanka, Burma, Indonesia, Myanmar, and more, Chettinad has much to offer. With mainstream media explorations of the region's history through dynasties like the Cholas and Cheras, Chettinad is now emerging as one of the most exciting regions for culinary exploration.



## LUCKNOW - 59%

With a rich history of Awadhi and Mughal rulers, many of whom were gourmands, the food culture of Lucknow runs deep. It is believed that cooks from the royal and noble kitchens eventually established their own eateries in markets around the city, creating a vibrant culture of street food. Don't forget to try the Nehari Kulcha, Sheermal and Malai Makkhan.

## SOUTH KOREA - 50%

K-pop, K-dramas and critically acclaimed Korean films are having a major moment in the global forum, and with this, there has been an explosive interest in Korean culture at large. And the cuisine of the country is no exception. Creating a vibrant street food culture. Korean restaurants are opening up around India, and travellers are keen to visit the country and experience its food culture first-hand.



With its bold and familiar flavours that perfectly please the Indian palate, Vietnamese cuisine has seen plenty of excitement in India in the last decade. Post pandemic, travellers are favouring South East Asian destinations, which are close and accessible, and of them, Vietnam is emerging top of mind for food lovers.





# GOA - 46%

Goa has seen an explosion of innovative F&B concepts in recent years. Not only are there a host of local as well as contemporary eateries, but also experiences such as guided feni tastings that are grabbing the attention of gourmand travellers.



A melting pot of culture, Kolkata has incredible street food to offer, spanning a number of cultural influences. From Kathi Rolls in flaky parathas, to Chowmein and Desi Chinese at street vendors in China Town, and Momos from Darjeeling in the hills of West Bengal. And of course, not to forget the Bengali Halwais who make savoury delicacies like Singharas as well as the famous Puchkas! It is no wonder this city is in the top three destinations for street food lovers!



Amritsar is the place for gluttony. With streets filled with vendors selling their ubiguitous Chole-Kulche, jalebis and gulab jamuns and the tall glass of lassi to wash it down, this city is a foodie's dream. While there was a time that travellers to Amritsar would plan a day to explore the city, today, food lovers are planning their trips here with one sole intention - eating!





## SPAIN - 43%

Spain has a vibrant culture of tapas and pintxos bars, and a delicious diversity of local cuisine across its geographies. Recently, it has also been heralded amongst the top destinations for award-winning fine dining. As travellers venture across the oceans this vear, Spain will beckon the loudest.

## VIETNAM - 48%







# TRAVELLING FOR TASTE

The Indian traveller was happy, by and large, with standardised hotel buffet meals and token 'local' meal offerings here and there when travelling — until now. Post pandemic, travel today goes beyond ticking stereotypical tourist activities off the list! Food is in focus on the Indian gastro tourist's plate and is here to stay!

#### The Age of the Multicuisine Buffet

The focus of travel for the Indian traveller down the ages has typically been to explore new destinations and visit tourist spots. Food preferences, while important from a dietary or religious

#### proscription perspective, were a concern. However, trying 'local specialities' was limited to a meal or two to tick tasting local cuisines off the list. Largely, the tendency was towards the familiar. Which resulted in the

evolution of generic multicuisine buffet offerings with a mixed platter of Puniabi, Mughlai, Continental and Indian Chinese, and a few token regional dishes thrown in for good measure.

#### A Taste of Freedom

A steady rise in culinary tourism was gaining momentum catalyzing change in the past few years. It was accelerated by the post-pandemic phenomenon of 'revenge travel'. So not only is there a remarkable boom in the travel industry, but a huge chunk of that uptick can be attributed to culinary tourism.



"Due to the travel restrictions, many food and travel enthusiasts

who were unable to experience culinary adventures are raring to go, now that most countries have lifted restrictions". observes Raaj Sanghvi, CEO of *Culinary Culture*, a platform that curates restaurant pop-ups in India with some of the biggest names from the international culinary community, including most recently Chefs Massimo Bottura and Alain Ducasse.

The adventurous online foodie of the pandemic has today become the offline gastro tourist, hungry to discover all the flavours they consumed in their virtual travels. They are choosing to travel for culinary exploration, be it to follow the Michelin restaurant trail, savour fine course-wise plated meals in Europe, eat their way through the food stalls of the world, or discover local regional cuisines

with cooking classes and more. "It would be fair to say that post-pandemic, there is a real hunger from Indian diners for once-in-a-lifetime culinary experiences", Sanghvi observes.

The choices are not limited to fine-dining, according to Sanghvi. While Culinary Culture has many loyalists that plan their travel and professional commitments around the platform's annual calendar, "Food lovers have long been accustomed to securing reservations at popular 'hard-tobook' restaurants, before even confirming flights and hotels. A desire that has increased manifold", he shares citing the example of Jay Fai, a Michelinstarred Thai street food stall, run by a 75-year-old lady in Bangkok. "It had a 5-hour long queue of international tourists lined up and obediently awaiting their chance to taste her signature 'crab omelette' that they saw on Netflix's Chef's Table episode and had been dreaming about"! he marvels.

Tourism bodies and destinations have learned the benefits of adapting food offerings to meet the demand of these specific lucrative markets and are reinventing themselves to attract them in larger numbers.



pure vegetarian and could not satisfy the demand for various diets such as Jain meals". shares Jane D'Cruz, Marketing Manager at Malaysia Tourism.

Realising the importance of appetizing vegetarian food for the India market, Malaysia as a country recalibrated their culinary offerings, leveraging the COVID period to educate and empower Malaysian chefs and product partners to cater to Indian tourists' dietary or religion-specific offerings. "In the post-pandemic world, we are prepared to welcome visitors with all dietary requirements, from pure vegetarian food to Jain food", she concludes.

A well-timed initiative because the Indian traveller today is looking for more than an occasional taste of local food.



#### **New Frontiers of Culinary Exploration**

This new-found desire to travel for food discovery has an increasing number of people travelling with the singleminded focus of discovering destinations through deep exploration of local food.

The avenues of exploration range over a wide variety of options that include foodthemed walking tours, local market explorations, visits to wineries for blind tastings, bar crawls, sustainable food tour options, and lots more. The goal is to understand a destination through deep immersion into its culinary culture and discover the unique intricacies of a region. Spice tours of Old Delhi's Khari Baoli – the biggest spice market in North India – seafood market explorations at Sassoon Docks in Mumbai, coffee and dosa trails in Bengaluru, mishti tasting walks in Kolkata, sourdoughmaking classes and pader trails in Goa, have food travellers going through the cacophony,

And the travel industry is happy to please every palate. "My tours are customized; no two are ever the same. They vary from street food, explorations of local community-centric neighbourhoods and their culinary offerings, to a visit to a vegetable or fish market, or spice shop followed, by a



odours, and all!

cooking demo in someone's home, or an elaborate lavish multi-course affair'',



It is not just travellers, even professionals from the industry look for culinary tours on their personal holidays as a way to explore places deeper, allowing them to create better propositions.

According to Tanwar, "There's definitely been a lot more interest in and conversations around food in the past 3-4 years. We've had requests from chefs, food enthusiasts, and professionals from the food

industry. In fact a new trend I've observed is of international and domestic food bloggers coming on our walks to augment their content propositions", observes Tanwar. Pathiyan who is an avid traveller herself adds that the endless possibilities of discovery add to the lure for her. "As a traveller, I love to explore local food and ingredients. A visit to a grocery store holds as much interest for me as a

shares Priya Pathiyan, a Mumbai *expert* who conducts bespoke city tours for inbound travellers. She goes on to share that visitors with longer duration stays show interest in cooking classes, while short stay foreign independent tourists (FITs) are more inclined towards curated food walks that offer an introduction to varied flavours.

An example of elaborate customised offerings is the local cheese tastings Mansi Jasani of The Cheese Collective conducts. Participants can sign up to sample their way through a platter of 4-5 Indian-made cheeses. "India has never been



a cheese-making country historically. but it has always been a dairy rich

one. People are interested in learning about food ways through the lens of dairy, ghee and cheese. In fact, they're always most excited to learn about buffalo milk! It's a fun and different way to learn about the old and new Indian dairy culture", smiles Mansi.

Travel companies and destination management companies (DMCs) have also noted the distinct rise in demand for such off-beat offerings. "As travel has



resurged, a lot of dormant desires have surfaced. Travellers now want immersive food experiences at

destinations such as Australia,

South Africa and France. And these could include anything from a cooking demo or visit to a specific restaurant, truffle hunting in Croatia or a wine and food pairing in the Yarra valley", shares Neelu Samant, Director at Quantum Travels Pvt Ltd.

According to Harshvardhan Tanwar of No Footprints — a travel boutique specializing in *walking tours* – this new gastro tourist is keenly invested in itineraries and researches food properly before travelling.



"We typically give our guests a list of tried and tested 💋 restaurants.

But occasionally, some incredibly proactive guests ask for something off the list. I remember one guest asked to visit the restaurant Ekaa just after it opened. It wasn't in our recommendations sheet yet, but they had read about it, online, perhaps"!



museum! I try everything local, even things that don't seem too appealing. This gives me unique perspectives on culinary traditions the world over and adds layers to my writing on food and travel", she shares.



#### **Ticking off the Foodie Bucket List**



"We're definitely excited about trying out new restaurants, bars and even

street food—almost evervone has a Goa 'list' or a Lucknow 'list", points out Smitha Menon, Culinary Editor, Conde Nast *Traveller.* But travellers and both the food and travel industries are discovering that food is a great lens to examine a destination, and not necessarily

the premise of holidays, alone. They also offer much to discover in one's own proverbial backyard.

"Understanding a food culture allows one to familiarise themselves with a new country, even at home. Tourists sign up for walking tours and classes to be able to take a bit of the intangible heritage and culture of a place back home with them.



But I find that many locals are

using food walks to discover

and explore alternate sides

#### **Lucrative Propositions for Industry Players**

Both the food and travel industries of India have seen the benefits and are paying attention to the marked shift in travel patterns. In this value chain, everyone from a content creator to a tourism board, DMC or travel agent can get involved in promoting culinary tourism.

For official government bodies, it's about highlighting an additional vertical to existing headers of adventure travel. scenic spots, popular cities to visit, shopping, and more. The culinary vertical showcases the various culinary experiences that a destination offers.

Tourism boards invest heavily in strategic campaigns to package their culinary heritage. "We acknowledge the growing interest in culinary tourism, especially among the GenX and offering varied culinary offerings for tourists to experience," observes D'cruz. "Over the years, Malaysia has witnessed an increasing number of tourists travelling for its culinary offerings. One of the major attractions among tourists who visit is authentic Malaysian food that represents the diversity of the country's cultures", she concludes.

Malaysia is not alone; many hospitality and tourism bodies have made cuisine offerings a primary focus and invest seriously in packaging up their destinations' culinary offerings, including Singapore, Thailand, France and even Australia.

"Australia's food and wine has now become one of its greatest assets with a range of quality produce that is second to none. The country's rich ethnic diversity has produced one of the most exciting and multicultural cuisines in the world. Indulging in great local food and wine is now a maior factor in holidav decision-making down under", observes Nishant Kashikar, Country Manager - India and

Gulf for Tourism Australia. While showcasing a destination and promoting understanding of the land and people through food is a value proposition for tourism boards, it also offers the travel industry lucrative opportunities to create new propositions of culinary history and heritage. "India is a new market for us, and we are currently gearing up to welcome more quests from there. We've had the privilege of hosting a number of journalists, vloggers, media and agents from India, and they have been most appreciative of the story connections and history we share on our tours", shares *Himanshi Munshaw* Luhar, owner at Foodie Trails, a Melbourne-based tour company specialising in culinary walks and food tours. "Our tours offer quests an educational



aspect. It gives them a different

perspective on what

#### otherwise just been a meal at a restaurant", she points out.

Culinary tourism also offers a huge boon towards creating jobs and offering newer forms of employment. "Tourism is a mass employer. Our tourism minister once said that one foreign tourist employs 8 people. Culinary tourism is no different. It has driven so many interesting concepts: especially home chef pop-ups", marvels Tanwar.

Himanshi adds that these propositions create an additional source of income as well as inspire deep personal satisfaction. "When we first started, it was a weekend offer of a single tour with one guide, that was alongside a regular job. We now offer 5 different tours, employ 5 staff and are looking to hire more to increase our capacity. Our tours have evolved in several ways to improve the overall guest experiences; we research communities to enhance the stories we showcase".

This culinary travel boom offers promise for different stakeholders. Hotels are working to create packages and curate programs to highlight their culinary gems as well. At Pugdundee Safaris, a chain of eco-friendly safari lodges in central India, the culinary degustation is a huge appeal for guests, even though the premise of their entire visit is to experience a jungle safari.



"The most authentic way of slipping into the heart of a region is via its legacv

of food traditions and the fables behind the flavours. For years now, tiger safaris have always been the high point for any wildlife seeker. However. we feel that the pleasure of wildlife holidays can be accentuated manifold by working on the other elements like cuisine", says Manav Khanduja, Co-Founder at Pugdundee Safaris.

Content creators are always on the hunt for experiences that they find unique enough to engage an audience. Special food-theme based experiences offer a way to do just that. "There is synergy in what I do in



my day job as an independent beverage writer and by offering to include an audience that is curious about heritage and drinks. Choosing

#### Focus Areas for the Food Travel Industry

The Indian consumer is hungry for new flavours and adventures on the plate and will pursue their quest enthusiastically and passionately in 2023 and beyond. The food and travel industries as well as tourism entities should leverage this optimally by investing resources and energies in creating value-based propositions that showcase the culinary culture of their destinations.

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Action Points - Growing interest in exploring new cuisines, such as that of the North East of India and Vietnam shows a clear interest in culinary explorations to discover new frontiers in food. The industry should take note of the increased demand for knowledge and skill enhancement to understand regional and gloabal cuisines and convert them into viable propositions of *curriculum development, local skill enhancement* for *employment* opportunities to offer new experiences for culinary tourism. The magnetism of food with storytelling is something the travel and food Industries can leverage in planning menus and concepts with investment in R&D and innovation.

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themes related to my current area of expertise definitely helps in thinking about and curating my walking tours", says Priyanko Sarkar, Independent F&B iournalist and Heritage Walks Leader.

For journalists, the emphasis is always a good story and now also asking deeper questions like the origins and meaning of culinary traditions. "The pandemic and the subsequent lockdowns helped us all engage with food in a more conscious. deeper manner. It was not just sustenance but also nutrition, entertainment, excitement, and a new pathway to learn about ourselves. Our readers became fascinated with questions about where our food comes from, how it originated, who grows it and what rituals are around it. As a culinary journalist, this opened up a world of possibilities for me to write about", shares Menon.

"The appeal of culinary tourism lies in the diverse audience that is willing to sample and the chance it gives to tell local stories. Local food and drinks are the best way to assimilate and understand a foreign culture in the most intimate way possible", concludes Priyanko Sarkar.

Gastro or culinary tourism opens up tremendous prospects, not only for the travel industry, but also for the food and allied industries. A way to a tourist heart may well be through their stomachs in the future.



# **FOOD AND TRAVEL**

The age of the the Indian gastro tourist is here! An increasing number of Indian travellers are looking for much more than regular tourist offerings when they travel today. Food is high on the list of priorities, and the food and travel industries are offering up a plethora of options for travellers to pick from.

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Read on to know what our panel has to say about the travel trends in 2023.

#### **Toolkit For 2023**

Content creators will find rich offeirngs in culinary explorations, be it in their own cities, other Indian destinations, or abroad. Propositions that take the traveller off the eaten path will be exciting. Discovering pocket-friendly food from *local, hole-in-the-wall* places can be a great option for content creators. Tourism boards should engage and leverage *micro-influencers* with a strong following to showcase their 'undiscovered' locations and local food vendors. Local home chefs and food connoisseurs can highlight a community's cuisine, street food treasures, and *local heritage* through cooking classes and homely meals.



#### **Section** At a Glance

The pandemic's virtual foodies have become the offline gastro tourists post the pandemic! And the world is literally their oyster! Indians are travelling in search of new adventures for their palate and will continue to do so long into the foreseeable future. And this time, the focus is on local, domestic, and international destinations







# TOP TRENDS IN TRAVEL FOR CONSUMERS

Indians are travelling with a vengeance, both locally and globally and demanding culinary experiences off the eaten track! This is playing a huge role in driving the industry to innovate and offer up culinary exploration propositions both with local and global destinations.

Our panel of experts have weighed in on *local food walks/market visits/cooking classes* being most sought after. The new gastro traveller will travel prolifically in search of *culinary culture and cuisine* experiences like food and beverage discovery tours.



Lacewalla

Culinary residencies by institutions and boards such as NRAI can give gastro tourism an impetus. They can work with foreign embassies to create exchange programs. Sanctions by the state governments for food exploration to revive indigenous cultures and food traditions will be a plus.

Experiences that offer something beyond food, i.e., an immersion into a culture will be welcome People want a pre-cursor to a place they will visit or want to re-live a travel experience from there. Food and cultural immersion tours are great opportunities for the food travel space.

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processes, produce, and composition.

I'm happy to see that Indian cuisine is being valued for being authentic and unapologetically true to itself. New restaurants that are going authentic and letting regional cuisine take centrestage are getting their due. There cannot be a better moment for Indian chefs than now. Indian cuisine will be the focus of the international traveller.



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Industry leaders must collaborate with hospitality and tourism players to make their experiences available to anyone who is interested. The offering is just not about eating but also the



Khanna



Local food walks



Travel to experience culinary culture and cuisine



Local food & beverage discoverv tours



After years of cooking from virtual explorations, the culinary traveller is looking to travel and taste the world for real. With international travel opening up, people are making the most of the opportunity to explore the world. And food plays a significant role in the choices they make with international destinations.

Our panel predicts the top three international food destinations that the Indian traveller will look to visit in 2023.





Vietnam





Inamdar

2023 is all about looking beyond 'cookie-cutter' travel plans. Emotionally connecting with cultures through micro-ethnic food experiences across regions, eating at known and unsung places, creating once-in-a-lifetime experiences and the age-old yet never-out-of-vogue touristy things are the future Food has always been an ice breaker, and that won't change! 

Indulging in great food, wine, and local cuisine is a now a major factor in holiday decision making, and Australia unarguably is the world's greatest restaurant serving up the best and most unique food and wine experiences in remarkable locations every day.





People will want to go back to eating as a community experience. Indulgent gourmet experiences, global or hyper local will be in demand. Travelers will seek out new and novel experiences but also hold on to 'healthy and heirloom' eating. Bringing local and global cuisine to the fore, with disclosures about sources, origin of ingredients, serving in traditional utensils, are things that the industry needs to plan for 

Travel trends are going the experiential way. Clients are choosing to stay longer in a city to enjoy the local food and budget for food walks and eating at local, moderately priced and gourmet restaurants. They also recommend them to others. The Indian traveller has truly involved. 



Munshaw



The Indian traveller is increasingly aware that India has an atlas of food experiences to offer up within the country itself and is using every opportunity to get out and explore the food experiences available both locally in their regions as well as across the country.

Let's look at the top three Indian food destinations that travellers will look at in 2023.



Mascarenhas

local flavours.

Food & beverage tours, local food walks, travelling for field research, and exploration of local foods will be an area of great excitement for the food lover in 2023. Local operators should consider promoting options in these segments to attract the discerning gastro tourist.



Collaboration and storytelling are crucial for eateries here. If their product remains confined to just the four walls of their dining room and kitchen then it becomes predictable. A big success at Sienna is our Baajar morning walks where diners and fellow chefs join our team for our morning procurement runs. This way they get a real sense of our cuisine.



# INDIAN STREET FOOD DESTINATIONS

Does Mumbai have better chaat or Delhi? Questions like this can drive friendly debates for hours at gatherings! A vibrant street food culture can add immense attraction to a city's food scene and offer travellers experiences they can talk about for years after. The last decade has seen a steady rise in interest in street food. An interest that has been taken to a frenzy by digital media drawing out stories of street food from the fantastic to the bizarre! So much so that the Indian traveller is opting for destinations just to discover local street food!

Let's see which Indian street food destinations will see most interest in 2023.





# EMERGING CONVERSATIONS

# INDIGENOUS **TRIBAL FOODS**

India is home to over 700 indigenous ethnic groups or Scheduled Tribes. Tribal culinary cultures vary based on region, topography, and geography, most of whom traditionally drew on their immediate surroundings for sustenance, which encompasses a vast majority of their foods that are hunted, foraged, reared or farmed on bunds. Tribal communities draw on generations of knowledge to identify and cook wild foods for consumption.

This year, the Emerging Conversations section examines the tribal culinary cultures of India.





#### FERNS

Known as Dhekia in Assam, lengda in Uttarakhand, kasrod in Jammu, therme thoppu in Coorg, churuli in Kerala and by several other regional names! Fiddlehead ferns are the tender curled leaves of the Diplazium esculentum fern, foraged and consumed in salads, stir-fries, pickles and more by tribal communities across various geographies of India.

#### TUBERS



India has a phenomenal diversity of wild and cultivated tubers included, but not limited to a variety of potatoes, sweet potatoes, and yams. While awareness and consumption of tubers is limited in urban India, adivasis, especially forest-dependent communitites rely extensively on them, contributing to as much as 30% of their diet.

### MUSHROOMS

While there is limited documentation of Indian ethnomycology, the foraging and harvest of mushrooms has long been practiced by indigenous communities throughout the country. Nearly every region has seasonal wild mushrooms that are sources of food and medicine for Adivasi communties, who rely on folk taxonomy and traditional knowledge to safely identify, harvest and use them.

MILLETS



Millets have been and continue to be a staple in Adivasi food across India, with a number of minor millets and varietals that adapted to specific geographies and climates. At a time when wheat and rice infiltrated our food systems, pockets of tribal communities held on to seed and grain, and have been central to the millet revival movement that is currently underway.

# MAHUA

Known as kalpavriksh or the tree of life in central India, nearly every part of the Mahua tree is used in the kitchen by tribal communities across the central belt of India. Most notable is the use of the flower, which is almost raisin-like when dried. Not only are they used to make Mahua liquor, one of the most widely traditional alcohols in India. but they are also used to sweeten chutneys and other dishes.

#### JACKFRUIT

The jackfruit is native to India and is an important food crop among tribal populations across humid tropical regions of the country, including the tropical hills in the East and North East, as well as the Eastern and Western Ghats. Consumed unripe as a vegetable or ripe as a sweet fruit, even its large seeds are a tasty and a nutritious food source.

### HONEY

Apart from its food and medicinal values, wild honey harvested from beehives on trees or rock cliffs, is also a valuable source of income for Adivasis. But the collection and consumption of honey is also intertwined with spiritual belief and ritual traditions, which often ensure regenerative harvest methods, as well as protection of wild bee populations.

## GOURDS

Gourds like bitter gourd, bottle gourd, ash gourd, pumpkins and more are grown and consumed by tribal communities around India. Various gourds are also hollowed and dried to be crafted into traditional musical instruments like the ektara and tambura, as well as bowls, spoons and containers to store water and seeds.



# TRIBAL CUISINE: THE FINAL **FRONTIER OF FLAVOUR**

Today, as discourse within the Indian food landscape is rapidly expanding to examine the food practices of more and more communities, conversations around what some may call 'tribal cuisine' are coming to the fore.

But what is tribal cuisine, really? And can there really be one singular tribal cuisine in a world where we have established that there is no singular Indian cuisine?

#### What is Tribal Cuisine?

Tribal cuisine is an umbrella term that has emerged to encompass what is actually a vast range of culinary cultures belonging to indigenous communities that have either been marginalised or romanticised down the ages, with poorly rendered caricatures and stereotyping around the word "tribal" becoming the norm.

India is home to over 700 indigenous ethnic groups or Scheduled Tribes that inhabit nearly every state and union territory in the country. Many of them, even today, rely on their immediate surroundings for a significant proportion of their food, be it farmed and reared or foraged and hunted. As a result, food varies not just by community, but by region, topography and geography.

#### Assamese home chef Gitika

Saikia illustrates this diversity within her own family. Belonging to the Sonowal tribe from the east bank of the Brahmaputra, the food she grew up eating was different from what her husband's family ate. "I did not



grow up eating jute leaves; they're so bitter - even more than karela! But my husband's family, who belong

to the Bodo tribe from the west bank, just love them! The more bitter, the better", she laughs!

Similar micro-regional variations in diet are found in tribal belts all over India. According to writer Sheetal Bhatt of the blog TheRoute2Roots, who has been documenting the culinary cultures of indigenous communities in Gujarat over the past two years, maize has long been a staple grain amongst Adivasis in the eastern belt of Gujarat, but varietal preferences differ across the region.

"In Sabarkata. towards the northeast, yellow maize is favoured, while

white maize is the staple in the eastern region of Dahod, and interestingly further down, in south-eastern Dang, there is extensive cultivation and consumption of nachni or finger millet, and a number of rice varieties, unlike most other parts of the state".

Geography is not the only factor, points out *filmmaker* and director Shubhra Chatterji, who has travelled across the country documenting traditional food cultures for the television shows 'Lost Recipes' and 'Chakh Le India' that have showcased

the foods of Rabaris in Gujarat, Gonds in Chhattisgarh, and more. Food practices, she observes, also depend on a community's livelihood, access, belief systems, and traditional wisdom of life cycle nutrition.



"Pastoralist tribes like the Rabaris of Kutch or the Ban Gujjars of

Uttarakhand consume a lot of dairy products from the milk of whichever cattle (camel, cow, buffalo, goat or sheep) they herd". Similarly, silk farming, spinning and weaving communities in parts of Assam and Meghalaya often make use of a portion of their silkworms as a source of clean and readily available protein. And in the winter months in Uttarakhand, "sour foods - sea buckthorn juice and the pulp of dried local apricots - are relished in the upper Tons region". Apart from the sensory pleasures these afford, sour foods such as these help maintain a balance of electrolytes and promote the assimilation of nutrients in the body. "Traditional wisdom amongst Adivasis allows the best use of what is found locally and ensures optimal nutrition

#### **Invaluable Traditional Wisdom**

Today, there is a collective recognition that indigenous communities hold incredible traditional knowledge that spans foraging and wild foods, soil health, biodiversity, ecosystem management, flavour extraction.

preservation techniques, medicine, and lifecycle nutrition. With much of this wisdom now being corroborated by western science, there is a growing belief that indigenous knowledge could hold solutions to a

number of modern problems, including lifestyle diseases, food insecurity, and climate change.

intake, in keeping with the

season or the life cycle".

An observation from Chatterji on the daily consumption of fermented rice gruel, practised in tribal regions across the country, illustrates this. "Today, nutritionists are telling you to have apple cider vinegar 30 minutes before eating carbs to slow down the release of sugars and reduce spikes in blood glucose. But so many ethnic communities have practised this for centuries by weaving fermented foods into their diets".

This pattern of mainstream or western science corroborating traditional wisdom is driving industry-wide interest from chefs, food companies, health professionals and consumers around the traditional generations-old food practices of indigenous communities, from millets and native varieties of rice to wild and foraged foods like mushrooms, ferns, and wild honey, and even processed foods like axone, khar, and mahua liquor.

#### **Preservation - the Need of the Hour**

Preservation of indigenous culture and wisdom is the need of the hour. A number of NGOs and grassroots organisations like OOO Farms, Keystone Foundation, The Nilgiris Foundation, Centre for Pastoralism and many more, are working in collaboration with Adivasi communities across various regions of India to preserve traditional knowledge, biodiversity and dietary diversity.

In addition to supporting traditional livelihoods like agriculture, foraging and animal husbandry these organisations are working to help communities reclaim a sense of pride towards their traditional food practices. Chef Thomas Zacharias of The Locavore, observes that sharing the stories of these communities is an important

#### How Will the Interest in Tribal Culinary Culture Play Out?

Tribal cultures with their deep connection to forests and diets based on wild and foraged foods represent a final frontier

"I've noticed the minute they stray away from traditional food, you begin to see signs of malnutrition", observes Chatterii, who works towards providing access to healthcare in the remote Tons Valley of Uttarakhand. "We did a study mapping the general health of the women in the region, and the results showed that older women in the community, who still followed the traditional diet of millets, meat, and a variety of local dals, beans and wild greens, had good counts of haemoglobin". However, vounger women, especially young mothers, who had switched to a dal-chawal diet from the Public Distribution System, were not receiving the optimal nutrition their bodies required, and many had severe anaemia.

That younger generations of Adivasis around the country are

#### moving to cities for education and work adds a layer of complexity to the matter. Bhatt expresses concern at the shift in food preferences this is creating. "Mothers tell me their kids no longer want to eat traditional grains like makkai (maize) and kodri (kodo millet). Instead, they want wheat and rice because that is what their peers and co-workers eat in the cities." This desire to switch to foods that other, 'progressive' communities are eating in order to assimilate and feel accepted is an unfortunate and ironic reality when one considers how affluent urban consumers are rushing to stores in search of just those traditional grains and millets



aspect of the work they do, to raise awareness, create market opportunities and generate



over just the last five years, their cooking practices are shifting, and moving closer to how we're

cooking in the cities", he observes from his partnership with OOO Farms and their community partners in Jawhar Village, Maharashtra. It was what catalysed his organisation to embark on the Wild Food Project through which a group of like-minded volunteers researched and documented the wild foods of the region. Findings were published in The Wild Food Zine, a beautifully designed book that sold out! "And because the objective of this project was not just to

create awareness amongst urban consumers, but also to create a repository of the community's knowledge they could be proud of and make use of, the book is now being translated into Marathi, the local language of the region", says Chef Zacharias.

Revival movements like these all share a collective aim to preserve traditional food knowledge before it is lost with community elders. These efforts are very well received by urban consumers who - with the consequences of nontraditional and homogenised diets manifesting in the form of lifestyle diseases - recognise that Adivasi communities are the last bastion of traditional wisdom that has sustained their communities in good health for centuries.

of food with a newfound exotic allure. This has been driving a surge in engagement around the food of tribal communities

in the mainstream F&B industry over the last few years. Chefs are travelling country-wide to learn about the food of

tribal communities in various regions. Hotels and restaurants are hosting pop-ups and collaborating with proponents from tribal cultures to create menus that highlight wild foods and cooking techniques of ethnic communities. Food publications are carrying an increasing number of features that examine Adivasi foodways and cover everything from foraged wild vegetables to edible insects, fermentation, local liquor, and more.

In the last two decades, social media platforms have given a number of subject matter experts channels to document and showcase their knowledge and interests. This democratisation of media has played a significant role in shifting conversations around food and allowing people to drive the narrative. This, in turn, has encouraged home cooks and food chroniclers from within indigenous communities to create blogs and YouTube channels like Village Cooking Channel, Isak Munday Eating, and Nagaland Foodie, to showcase the food traditions

of their home kitchens to the world.

One early mover is Gitika Saikia who has today come to be known as a custodian and subject matter expert on the tribal cuisines of Assam and neighbouring regions. Saikia began her journey through blogging about a decade ago. The then marketing professional began Gitika's PakGhor, a blog to share her kitchen experiments. However, her focus soon shifted to the food culture of her own community, and then rapidly expanded to include the ingredients, recipes, traditional feasts and festive celebrations of various tribal communities from Assam and other parts of the North East.

Eventually, she also began hosting pop-up meals in her Mumbai home to showcase the cuisines she was documenting and became a pioneer of the home chef movement in Mumbai. She would carry local ingredients from her trips home back to Mumbai – everything from varieties of aromatic rice to ant eggs, fermented bamboo shoot and smoked meat - introducing hundreds of people to the food of the North East through her popups and food festivals. Today, she has showcased her food at restaurants like the Bombay Canteen and five-star hotels around the country.

These early collaborations paved the way for a legion of regional food specialists to host similar dining experiences. Recently, sisters Daphimanroi and Dakiwanri Warjri of the Khasi community of Meghalaya hosted a pop-up dinner serving the food of their community in collaboration with The Goya Journal; Naga chef and restaurateur Karen Yepthomi brought her food to The Leela Palace, Bengaluru with a Naga Food Festival: and Chef Kunzes Angmo from Leh has been serving up Ladakhi fare at popups in Mumbai, Kochi and more.



#### Mindful Engagement Around Tribal Conversations

In addition to the individual efforts of home chefs and regional food experts, grassroots organisations and NGOs are also facilitating discourse around the foods of Adivasi communities they work with. In December 2022, The Nilgiris Foundation hosted a Nilgiris Wild Food Festival in collaboration with the Kuruba, Badaga, and other Adivasi communities in the Nilgiris featuring activities like a wild food walk, panel discussions, and a series of curated dinners in collaboration with celebrity chefs.

OOO Farms, which works with a number of communities in the Palghar district of Maharashtra and other states, regularly hosts food festivals that highlight dishes and showcase the diverse produce of tribal communities. *"They have so much knowledge*  about good food and are such good managers of their land and resources.

Their conversations about food are far beyond what we're discussing in the cities. Our Wild Food and Rice Festivals in Mumbai began as a way to create some awareness, but today they have become a forum for dialogue on better food practices", explains Shailesh Awate, founder of OOO Farms.

These growing discourses in the food and media landscape are a step in the right direction. But, experts caution they should be undertaken with the right intentions and approach, without which efforts at representation and inclusion can fall gravely short of the mark.

"In Assam, farmers drink rice

beer every day for muchneeded relief after a long day tending their paddy fields," Saikia shares. "And traditionally, there was no refrigeration, so natural methods of food preservation like smoking or fermentation became important kitchen techniques that have been in practice for centuries amongst indigenous communities." Today, such practices might be discussed with feverish excitement by urban food explorers, but Saikia clarifies, "they were born out of necessity and resourcefulness rather than as glamorous ways of life".

"A lot of people are jumping on the tribal cuisine bandwagon, using it as a marketing tool for themselves at a time when diversity is being lauded", observes Zacharias, adding

that "the focus has shifted from looking down on the food of tribal communities to exoticising, almost fetishising it - which is a dangerous path to go down". This is why he is a firm believer that intention and approach matter. According to him, many chefs are interested in working with ingredients or techniques of tribal culinary cultures but don't want to invest the time and effort needed to understand the cultural context and nuances, which leaves them with a blinkered perspective on the food they hope to showcase.

That it is critical to be mindful in conversation about food with Adivasi communities is something that resonates with Saikia, Zacharias, and Bhatt. Tribal communities themselves often undervalue their food as simple fare in comparison to the perceived glamour of the 'other'. "They feel it is shameful at worst, and modest at best, but not extraordinary or worth celebrating", observes Bhatt. And because food is deeply intimate and linked closely to a sense of culture and identity, even the most innocent remark or an unsolicited opinion could be deeply hurtful and rock the vulnerable process of sharing.

It goes without saying that credit must be given where it is due. Many believe that

#### Focus Areas in Chronicling Tribal Cultures

The Indian consumer is more excited for culinary cultures than ever before. The industry is constantly looking for new offerings. No wonder then that 'Tribal Cuisine' is emerging as a new frontier of culinary discovery. At this nascent stage of 'foraging' for opportunities, those looking at tribal culinary culture for inspiration should consider approaching the effort with the right intent, a respect for the communities, and engage in mindful conversations by investing resources and energies in specific areas that can allow this to be a win-win for all segments.

Action Points - While conversations around tribal foods and methods inspire feverish excitement, it should be noted that these were not a glamorous or monolithic construct. Rather they evolved of *necessity, resourcefulness and mindfulness,* a deep respect for nature and conservation and *taking only as much as needed.* Food is deeply intimate and is strongly linked to culture and identity, and those chronicling it should *approach tribal communities mindfully* and with respect by having in-depth dialogues, taking care to avoid exoticisation and fetishisation of these foods. Chefs interested in working with wild ingredients or techniques of tribal cuisines should consider investing time and effort in *understanding and respecting the cultural context* and nuances around them to truly do justice and *avoid appropriation and give credit where it is due.* But *be prudent about sharing locations* or village names, and *exposing vulnerable regions or communities to potential exploitation.* 

it is unethical to gatekeep knowledge or exploit sources of information that belong to a community of people. "I always mention the name of the community and showcase the names and photos of the people I have learnt from (with their consent) when publishing my research on my blog or social media", explains Bhatt. However, she is prudent about sharing locations or village names to protect those regions or communities from potential exploitation. She also invites her sources and collaborators to co-create and contribute stories to her blog through narrated. written, or video content, with the aim of sharing her platform with those who actually hold the traditional knowledge.

Chatterji echoes this philosophy, spending considerable time and effort briefing and sensitising her crew before they begin filming and production of food travel shows. Aware that TV shows often present stories through the eyes of just one person, such as the show's anchor, she has been actively moving away from this traditional approach in the last five years. "How can someone say something is good or bad or wonderful without enough cultural context? The role of the anchor is now more

about interviewing rather than commenting - we invite the sources to talk about their food without comment on the culture or technique". While the intent is important, she points out that there is still a possibility for important nuance to be missed by an outsider without the lived cultural experiences. This is why she believes it is always better to work in collaboration with someone from within the community and let them lead the way in deciding how they would like their culture represented.

These conversations indicate that the future will bring a deeper study of tribal foodways. What is known barely skims the surface. And while it is exciting to see growing discourse being co-created and helmed by those within the community itself, it is clear that these diverse foodways most certainly cannot be clubbed as one singular 'tribal cuisine'. As the conversation picks up momentum, it is imperative that it grows into a space for a respectful, inclusive and collaborative way forward.



# **EMERGING TRENDS**

Indian food consumption has changed drastically post pandemic. And nowhere is this more apparent than in the emerging conversations section. The focus on health – both the individual's and the planet's - continues to be in focus, and 2023 will be all about provenance and sustainable practices across the board from sourcing, food preparation and cooking to serving, packaging and waste management.

Read on to see what our panel's predictions for emerging trends in sustainability are in 2023.

#### **Toolkit For 2023**

Innovative use of kitchen 'waste' is already a popular topic on Instagram. And content creators can leverage this to their benefit. Content showcasing *local markets*, elaborating on and evangelising local and seasonal produce makes for fantastic 'discovery driven' content. Home chefs and content creators should consider creating propositions around traditional eco-friendly meals that showcase wisdom around seasonal food consumption, eco-friendly food service options and waste reduction hacks. Content about *local produce and user hacks* will be much appreciated. Recognising and supporting food businesses that deliver on sustainability is fantastic for stakeholders across the board as well.

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#### Section At a Glance

The industry and the consumer of 2023 will be conscious and mindful. While flavour and regional cuisine explorations are exciting and will see much discussion, the consciousness around clean eating and sustainability will greatly drive decisions around consumption and purchase, be it of seasonal produce, root-to-stem or nose-to-tail cooking, the effective management of kitchen waste or sustainable packaging.

2023 is the year to focus on sustainability for the industry. This is the time to invest in collaborations with farmers, local producers and farming communities, thereby supporting them directly and celebrating their endeavours. Creating propositions around local and seasonal menus will be supported by mindful consumers, as will initiatives that support *minimising* kitchen waste. Businesses that invest in and commit to sustainable food packaging solutions will also find greater consumer support in 2023.







# SUSTAINABILITY IN THE INDIAN HOME KITCHEN

Sustainability continues to be a concern for the post-pandemic consumer. The increasing concerns around carbon footprint, waste reduction, and the long-term impact of individual and collective choices on the economy and environment will make 2023 a year of conscious spending and mindful consumption.

One of the biggest positive pivots from the pandemic was the growing focus of consumers purchasing on provenance, and this prevails. Today's consumer wants to know where their produce comes from, and our panel forecasts buying from local farmers and food producers will be a top consideration for 2023. They also predict seasonal and local ingredients will see more demand in 2023. Mindfullness will also drive increased demand in *eco-friendly kitchens*.



completely

Reducing over-packaging (e.g., plastic wrapping around coconuts) and individual packaging of ingredients will be a great step towards sustainability. We must have more traditional ways of serving, packaging, and storing - like using sal leaves, coir, and bamboo baskets.



Chef Thomas Zacharias

them and the end consumer.

Promoting local farmers and keeping the freshness will be the key for us today. For a business to be successful, you need a story and uniqueness. As a hotel, we mostly limit ourselves to a 100-km radius of produce, wherever possible.





Shobhan

Buying from local farmers and food producers



Sourcing of local and seasonal ingredients



Eco-friendly kitchens (reduction of plastic for storage and delivery)



Innovative use of kitchen 'waste' (eg. Nose-to-tail, Root-to-leaf, etc)

# SUSTAINABILITY IN THE PROFESSIONAL KITCHEN



The dining out sector creates a huge carbon footprint, which makes improving sustainability in the industry more important than ever. This goes beyond the efficient use of energy and water resources. Concerns around waste reduction and improvements in sustainable packaging are primary drivers when it comes to their dining out choices.

Interestingly, our panel across both the dining out and dining in segments foresee the same trends on the uptake in 2023. Restaurants and hotels will increase buying from local farmers and food producers and focus on making their kitchens more *eco-friendly* by implementing waste reduction and recycling systems. The focus on sourcing and highlighting *local and seasonal ingredients* will continue to grow.



Buying from local farmers and food producers



Eco-friendly kitchens (reduction/recycling of plastic for storage and delivery)



Sourcing of local and seasonal ingredients



Innovative use of kitchen 'waste' (eg. Nose-to-tail, Root-to-leaf, etc)



Chowdhary

The industry can create mobile apps for sale or donation of foods, reduce food miles by sourcing locally if they're looking at using kitchen waste innovatively.

The industry must look at reducing plastic and other packaging in processed and restaurant delivered food, and encourage people to buy and eat local and seasonal food. Each restaurant can adopt a group of local farmers and work with them and have food festivals using their products





The F&B Industry needs to form closer ties with farmers and producers, develop zerowaste kitchens and menus that better reflect seasonality and local produce. The movement has begun but it's not yet widespread.

Going back to the roots is important. When we directly engage with farmers, they will get a better price for their produce, which encourages them to produce the way restaurants prefer. Thus, its a win-win situation for both reduced raw material costs and improved ingredient quality. 



Chef Regi Mathew

# PACKAGING AND **DELIVERY SOLUTIONS**

With home delivery exploding, home chefs stirring their innovative offerings into the mix, and cloud kitchens growing exponentially, packaging requirements have evolved. This leads to the obvious concern over the environment. Sustainable solutions to packaging that won't choke landfills is the need of the hour. This has created new opportuniies for the food packaging industry..

In-home diners are looking for options that offer sustainable solutions to packaging, and our panel foresees *culinary experience boxes*, such as Onam Sadya or Maharashtrian Pangat meal experiences seeing continued interest because they meet the need of health and mindfullness. Additionally, *plastic*free, eco-friendly solutions will be more in demand than ever — be it recycled options or those made of bagasse and areca. All of this is also driving manufacturers to innovate with alternative and upcycled packaging materials.



We need economical, eco-friendly packaging material options. Most importantly, the creation of an eco-friendly straw that doesn't get soggy.



solutions and strategies.

A little goes a long way, and packaging plays a crucial role. Consumers love it when food arrives well-balanced and plated to perfection. Recently, a cloud kitchen delivered wontons piping hot across a distance of 35 kms in a perforated tissue-based brown bag. Kudos to the thought!





Culinary experience boxes (Onam Sadya, Maharashtrian Pangat)



Plastic-free eco-friendly solutions (glass, paper, bagasse, areca, etc)



Innovation in alternative and upcycled packgaging



Combo boxes (product pairings and brand collaborations)

# **PANEL OF EXPERTS**

Aakash Bhalerao Chef

Aanjayesh Rao Ganta Culinary Student

Aaron D'Souza Home Chef

Aatish Nath Freelance Food Writer

Abhilasha Jain Owner, Marwadi Khana

Abid Rahman CEO, Tea Valley

Abinas Nayak Corporate Chef | Co-Founder, Rroshashala

Aditi Dugar Owner, Masque

Aditya Agrawal Co-Founder, P-TAL

Aditya Kadam Culinary Student

Aditya Shygith Culinary Student

Chef Ajay Chopra Menu and Restaurant Consultant, Zion Hospitality

Chef Ajeet Kalbag Chef and Culinary Consultant

Ajit Balgi Founder, The Happy High Wine and Spirit Consultants | Cognac and Wine Educator

Akansha Patil Culinary Writer and Researcher | Baker, La Delizia

Akash Hirebet Beer Consultant

Alka Jena Food Blogger and Photographer

Alpana Varma Owner, The Bihari Studio

Chef Altamsh Patel Executive Chef, Hilton Mumbai International Airport Chef Amal Farooque Founder and Chef, SugarOverDose, Sliders & Fries and Sage & Olio

Amalendu Bhattacharjee Culinary Student

Aman Malhotra Culinary Student

Amar Gutta Food Researcher

Ameeta Agnihotri Food Critic and Writer

Chef Amit Pamnani Chef and Owner,

Amita Gadre Clinical Nutritionist

Desserts by Pihu

Amrita Chatwal Owner, Ammiji's

Amrita Gangatirkar Founder, Researcher and City Chronicler, Nashik Heritage Trails

Chef Anahita Dhondy Chef and Author

Aniket Vartak Culinary Student

Anil Mulchandani Author, Food Critic and Freelance Journalist

Anindya Sundar Basu Food Writer and Photographer

Anirban Dey Culinary Student

Anisha Rachel Oommen Co-founder, Editor, Goya Journal

Anitha Reddy Associate Director, Sahaja Samrudha

Anjana Gopakumar Restaurant Consultant and Food Blogger

Antara Nayak Culinary Student

Antoine Lewis Food Writer Anubhuti Krishna Independant Journalist

Anuradha Joshi Medhora Chef and Founder, Charoli Foods

Anurag Mallick Travel and Food Writer | Culinary Consultant

Anushruti Health and Well-being consultant | Nutrition Expert | Food Content Creator, Divine Taste

Aparna Bhat Cultural Facilitator, The Traveling Thali

Arti Bhatia Culinary Student

Aryan Shetty Culinary Student

Aseem Hattangadi Founder, The Travel Therapist

Chef Ashish Bhasin Director F&B and Culinary, The Leela Group

Aslam Gafoor Hospitality Professional and Columnist

**Chef Auroni Mookerjee** Executive Chef and General Manager, Sienna Store and Cafe

Azmat Ali Mir Owner, Sarposh

Chef Balpreet Singh Chadha Executive Chef, The Park Kolkata and Denmark Tavern

Bandi Prabhakar Rao Founder, Hariyalee Seeds

Bhumika Hariramani Culinary Student

**Charmaine O'Brien** Writer, Culinary Historian, Educator and Author

Chirayu Mandloi Culinary Student

Christina Kinny Owner, East Indian Cozinha Daniel Culinary Student

Debjani Chatterjee Food Blogger, Debjanir Rannaghar

Debolina Ray Blogger, She Knows Grub

Deepa Chauhan Owner, Mortars and Pestles

Deepa Ravi Content Creator

Deepa S Reddy Cultural Anthropologist and Researcher, University of Houston, Clear Lake

Deepika Sethi Founder - OMO, AMPM, Wild & Raw

Devansh Jhaveri CEO, Hustle Food Pvt. Ltd.

Chef Devender Bungla Corporate Pastry Chef, Hyatt Regency Delhi

Devyani Nath Assistant Beverage Manager, JW Marriott, Bengaluru

Dhairyasheel Bhale Culinary Student

Dhani Goregaonkar Co-founder, Paisley Experience, Alibaug

Dhwani Masand Culinary Student and Home Chef, Blue Ivy Tea Cakes

Dina Weber Baker and Founder, Sapa Bakery

Divija Singh Recipe Developer, Menu Curator, Food and Restaurant Consultant

Doma Wang Owner, Blue Poppy Thakali

Eshwar Culinary Student

Farah Yameen Food Writer and Public Historian

Fiona Arakal Executive Director, Ishka Renewable Farms

**Diwan Gautam Anand** Founding Trustee, Cuisine India Foundation | Former EVP ITC Hotels Garima Tiwari Content Creator and Blogger

Gaurav Vikas Pawar Culinary Student

Gauri Devidayal Co-Owner The Table, Iktara, Mag Street

Chef Girish Nayak Chief Mithaiwala, Bombay Sweet Shop

Gitika Saikia Home Chef, Gitika's PakGhor

Chef Harangad Singh Chef Owner, Parat

Harish Rao Food Consultant

Harshvardhan Tanwar Co-Founder, No Footprints

Heemanshu Ashar AlcoBev Specialist

Heena Munshaw Managing Director, Beacon Holidays

Hemanshu Sane Culinary Student

Himani Sona Culinary Chronicler

Himanshi Munshaw Luhar Owner, Foodie Trails

Inderpreet Nagpal Home Chef, Rummyskitchen

Insia Lacewalla Travel Content Writer

Isheta Barve Culinary Student

Chef Dr.Izzat Husain Chef and Physician

Jaisleen Takkar Culinary Student

**Jane D'Cruz** Marketing Manager, Tourism Malaysia

Janhavi Prasada Home Chef and Owner, Cafe Chica

Jasleen Marwah Chef and Founder, Namak Swaadanusaar

Jayatri Biswas Owner and Chef, The Fat Little Penguin Jitin Mittal Owner, Henry Havaldar Hospitality

Chef Joel Basumatari Freelance Chef and Consultant, Manager of Saucy Joe's

Jonty Rajagopalan Owner, Detours India

Jyothi Varne Food Blogger and Home Chef | Spice Charmer

Kalyan Karmakar Food Writer and Brand Consultant

Kamiya Jani Founder and Chief Traveling Officer, Curly Tales

Kaniska Chakraborty Independent Brand Consultant

Karan Sampat Chef and Owner at Gourmet Dabbawala, Huckin' Fungry! And Lunch Box of the Day

Kartikeya Sinha Chef and Founder, Kartik's Kitchen

Kashmiri Barkakati Nath Assamese Culinary Chronicler | Chef and Founder, Kata Food, KnOrders

Kaveri Ponnapa Culinary Expert | Author and Independent Writer - Food and Wine

Kavish Agrawal The Bombay Canteen -Kitchen Team

Kavya Anandbabu Culinary Student

Kazem Samandari Founding Chairman, L'Opéra, Pâtisserie, Boulangerie and Salon de Thé

Kerwin Savio Nigli Head, Department of Hotel Management, Christ University

Ketan SS Gohel Co-Founder and Owner, Brewbot Craft Brewery

**Dr. Khadar Valli** Independent Forest Agricultural Scientist and Food Expert

Khushboo Agarwal Owners, Frais Farms

Khushi Khanna Culinary Student Kiran Patil Director - Sales and Marketing, Reveilo Wines

Chef Koushik S Chef | The Mad Chef India

Krish Ashok Author, Masala Lab: The Science of Indian Cooking

Krishnananda K R Culinary Student

Kumar Kempaiah Agri Entrepreneur and Consultant

Kumar Shobhan General Manager, Hyatt Regency Kolkata

Chef Kunal Arolkar Pastry Chef, Head Trainer | Cake and Dessert Caterer and Supplier

Kunal Vijayakar Host - The Foodie | Food writer and Broadcaster

Kunzes Angmo Founder and Director, Ladags Earth Agro Foods and Artisanal Alchemy

Dr. Kurush Dalal Archaeologist. Culinary Anthropologist and Museum Consultant | Director, INSTUCEN School of Archaeology

Larissa Valladares Home Chef and Food Curator, Incendiary Kitchen

Lavi Kaur Food Blogger

Lichan Humtsoe Founder and CEO, Été Coffee

Lipaa Shah Home Chef, Food Fiesta

Magandeep Singh Columnist and Sommelier

Mahir Checker Culinary Student

Mahrukh Noshir Mogrelia Home Chef

Manav Khanduja Co-Founder, Pugdundee Safaris

Chef Manish Khanna Chef and Founder Partner. Brownie Point and Noir

Chef Manish Mehrotra Corporate Chef, Indian Accent Restaurants, New Delhi and New York

Manjiri Gokhale Culinary Student

Mansi Jasani Founder, The Cheese Collective

Marryam H. Reshii Author and Journalist

Chef Maxime Mon Tay Chef, Cafe Monique

Chef Megha Agarwal Corporate Chef, Summerhouse Cafe, Auro Kitchen and Bar

Megha Phull Founder, Zealo Foods

Mithila Katiyar Food Photographer and Head of Branding and Content, Foodsta Kitchens

Mohit Shetty Culinary Student

Dr. Mohsina Mukadam Food Historian

Monika Manchanda Chief Culinary Officer and Co-founder, LiveAltLife

Mudra Keswani Food Blogger and Writer

Muskan Bagrecha Culinary Student and Intern, ITC

Nachiket Shetve Co-founder, Kytchens

Narmada

Naimita Jagasia Chef-Founder, An Ode to Gaia

Nambie Jessica Marak Owner, Eat your Kappa Farm

Namrata Sundaresan Cheesemaker | Founder and Partner, Kirke Cheese (Kase)

Dr. Nandita Iyer Food Blogger, Saffron Trail | Author, The Everyday Healthy Vegetarian, Everyday Superfoods

Nanndini Khanna Culinary Student

Natasha Almeida The House of Jevayla Ye Store

Natasha Gandhi Chef and Owner, House of Millets

Navika Kapoor Chef and Owner, Zuru Zuru, A Ramen Diner

Nazaneen Jalaludheen Consultant and Cookbook Publisher

Neelu Samant Director, Quantum Travels Pvt Ltd

Neola Lewis Culinary Student

Nidhi Kaushik Culinary Student

Nikhil Merchant Food and Beverages Writer

Nikita Nair Culinary Student

Nikita Nandkumar Culinary Student

Nina Doshi Co-Founder, Nina & Dhvani | **Culinary Chroniclers** 

Nishant Kashikar Country Manager, Tourism Australia (India and Gulf)

Nitika Kuthiala Home Chef, Pahadipattal

Nivedha Sivakumar Chef and Owner, Coal to Oven

Nolan Michael Mascarenhas Storyteller, Juror and Culinary Curator

Odette Mascarenhas Author and Food Curator Food Critic, Times of India

P Ravi Kumar Managing Director, Moon Foods

Palak Gulati Owner, Ellora's

Pallab De Food Blogger, Hydfoodguy

Param Praveen Trainee Chef, Restaurant Chef Pillai

Dr. Chef Parvinder Singh Bali Corporate Chef L&D, Oberoi Centre of Learning and Development

Pawan Hora Public Relations Consultant

Chef Pooja Dhingra Pastry Chef and Founder, Le15 Patisserie

Pooia Khanna Food Influencer and Content Creator | Executive Chef, Crompton

Pooja Vir Hospitality Brand and Communication Strategy Advisor

Dr. Poorvi Bhat Naturopathic Doctor and Nutritionist

Prakruthi lyer Culinary Student

Pranav Bhardwaj Culinary Student

Prashant Issar Chief Operating Officer, Bellona Hospitality Services

Prashant Parameswaran Managing Director and CEO, Tata Consumer Soulfull

Prateek Vaid Vice President - Product and Operations, CloudChef

Pratheek Ponnappa Food and Beverage Blogger, Grubitizer

Prerna Kumar Founder, ChaiVeda

Pritha Sen Consultant Chef, Writer

Priya Ganapathy Travel and Food Writer | Culinary Consultant

Priya Kapoor Director, Roli Books

Priva Patel Casual Baker

Priya Pathiyan Deputy Editor, TravelDine | Creator, Bespoke Bombay Tours

Privanko Sarkar Content Strategist and Founder Editor at Gurgl.in | Alco-Bev Tour Expert

**Dr. Pushpesh Pant** Academic, Food Critic and Historian

Raaj Sanghvi CEO, Culinary Culture

Chef Rachit Kirteeman Chef. Researcher and Consultant | Food Experience Curator

Radhika Dhariwal Founder and Director, Pass Code Hospitality Pvt. Ltd.

Rahul Sharma Head Chef, Araku

Chef Rahul Wali Chef and Partner, R.W. Hospitality Services

Rajan Sethi Founder, OMO, AMPM, The G.T. Road, Ikk Panjab, Kung Fu Mamma

Rajnush Agarwal Owner, MharoKhet

Chef Rakhee Vaswani Celebrity Chef | TV Show Host Founder - Palate Culinary Academy

Chef Ranveer Brar Celebrity Chef and TV Show Host

Ratika Bhargava Food Consultant, Author, Recipe Curator | Owner. CauldronSisterss

Ravi Miglani Professor and Home Cook | Food Blogger, This Professor Cooks

Chef Regi Mathew Co-owner and Chef, Kappa Chakka Kandhari

Reshma Mane Home Chef, Every Aroma and Vannu Tinnuka

**Riccha Khetan** Food Consultant, Author, Recipe Curator | Owner. CauldronSisterss

**Richa Chitgopekar** Food Writer

Ritu Pattanaik Food Blogger and Writer

Rocky Mohan Founder, Gourmet Passport

Rocky Singh Food Enthusiast, Author, TV Anchor

**Rohan Sirohia** Founder and Director, Goodwyn Tea

Rohit Raman Culinary student

Chef Rohit Sangwan Executive Chef, Taj Lands End Mumbai

Roopa Nabar Author, Home Chef and YouTube Presenter

Roshni Bajaj Sanghvi Food and Travel Writer | Editor-in-chief, Enthucutlet

**Roxanne Bamboat** Food and Travel Writer | Content Creator

Ruben Rodrigues Food Influencer and Content Creator, Mr Kurkurit

Ruchi Shrivastava Co-founder, Greed Goddess Media

Rukshana A. Kapadia Consultant Strategist and Ideator | Food Writer and Content Creator

Ruth Dsouza Prabhu Independant Journalist

Rushina Munshaw-Ghildiyal Author | Culinary Consultant | Culinary Chronicler

S Malathi Culinary Student

Sadaf Hussain Author and Chef

Saee Koranne-Khandekar Author and Culinary Consultant

Sahil Yadav Culinary Student

Saina Jayapal **Public Relations Consultant** 

Sakhi Ekawale Home Chef, Vanilla Ecstacy

Chef Sakshath Shetty Chef

Saloni Malkani Co-founder, The FBAI

Sameer Seth Co-founder, The Hunger INC

Sanchit Khandelwal Food Reviewer

Sanjay Anand Director, Hammer Group

Sanjeev Sudarshan Culinary Student

Sankalp Vishnu Author and Food Critic, Times of India

Sanmish Marathe Owner, Icestasy Projects

Sanskriti Bist Freelance Food Stylist

Saransh Mehta Culinary Student

Sarthak Nayak Culinary Student

Saurabh Singh Culinary Student

Sauray Shiyram Culinary Student

Savio Pereira Managing Partner, Finest Journeys of India

Sayantani Mahapatra Blogger, A Homemaker's Diary

Seemantini Mihir Co-founder, Studio Coppre

Shagun Mehra Entrepreneur, Chef and Gastronomic Curator, Sukh Shailesh Awate Farmer, Teacher and Agripreneur | Co-Founder, OOOFarms

Sharad Dewan Chef and Director, Gourmet Design Company, Gourmet Concert Company and Varak

Sharmila Ribeiro Author, Everyday Love - A Mother's Guide to Healthy Cooking

Shashank Agarwal **Owners**, Frais Farms

Shatbhi Basu Master Mixologist and Partner, STIR Academy of Bartending

Sheetal Bhatt Food Blogger, The Route 2 Roots

Shikha Kansagara Farmer and Director, OOO Farms

Shirin Mehrotra Independent Food Writer. Researcher and Anthropologist

Shivan Gupta Founder, Cafe Monique

Shreshtha Chhabra Food Researcher and Writer

Shreya Khandelwal Culinary Student

Shreya Kishore Culinary Student and Home Chef

Shri B Sharat Commissioner for Agriculture Shri Bala Cook, Chronicler of Food and Food Historian

Shriva Shetty Co-founder, Buttercream Co.

Shruti Kedia Brand Consultant

Shruti Taneja Founder, Nivaala

Shubhra Chatterji Film Director, Writer, Documentarian

Shweta Mohapatra Food Archivist and Writer

Sibendu Das Freelance Journalist and Food Explorer

Smita Priyadarsini Food Blogger, Food Author, Home Chef

Smitha Menon Culinary Editor, Conde Nast Traveller

Smriti Agarwal **Culinary Student** 

Sneha Dutta F&B Media Consultant

Sohel Sarkar Freelance Food Writer

Somanna Muthanna Founder and CEO, The Soul Company

Sonal Chowdhary Nutrition Consultant and Author Soumitra Velkar Catering Business Owner

Sreejith P J **Culinary Student** 

Srinjoy Roy

**Culinary Student** Subhasree Basu Owner, Greedy Foods

Sudesh Pai Food and Beverage Consultant

Suhas Dwarakanath Owner, Benki Brewing Tools | Lead Trainer and Founder, Speciality Coffee Academy of India

Sukesh Sathyamoorthy **Culinary Student** 

Sumit Tandon Chef Owner, Jumbo Restaurants

Supriva Arun Nutritionist and Author

Sushil Dwarkanath Chef and Culinary Educator

Svetlana Babu **Culinary Student** 

Sweta Biswal Culinary Chronicler, Food Writer and Meal Curator

Swetak Abhisek Mohapatra Food Writer, Food Researcher and Odia Culturist

Taiyaba Ali Head Chef, Khanposh Restaurant | Independent Food Writer

Tanushree Bhowmik Food Historian, Researcher and Writer

Tanya Panjwani **Culinary Student** 

Tapaswani P Trained Chef, Paris | Coffee Planter - Harley Estate

**Tarannum Maniul** Journalist and Food Writer

Dr. Tatyana Dias CEO, Veruschka Foundation | Co-Founder, A Bite Better

**Chef Tejas Datye** Chef

**Chef Thomas Zacharias** Founder, The Locavore

**Thrivikram Nikam** Joint Managing Director, Amrut Distilleries

Trishika Rajagopal F&B Trainee, Portosino

Trishti Bhardwaj Food Blogger

Umar Rather Content Creator, Kashmir Foodgram

Urvi Khanna Food Writer | Chef. Sodexo@Google

Chef Urvika Kanoi Chef Owner, Cafe Duco and The Daily Cafe

Chef Utkarsha Matkar Chef

**Utpal Khot** Managing Partner, IndoCulinary Alliance LLP

V. Karthik Kumar Mixologist and Beverage Consultant

Vanika Choudhary Chef and Owner, Noon and Sequel

Chef Varun Inamdar Two National Awards Winner and Chef

**Chef Varun Totlani** Chef, Masque Restaurant

Veera Bai Co Founder, The House of Jevayla Ye Store

Chef Vicky Ratnani Celebrity Chef and Founder, Speak Burgers

Chef Vignesh Ramachandran Chef and Partner, Once Upon A Time Restaurant

Chef Vikas Khanna Celebrity Chef and Restaurateur

Vikas Seth Chef and Culinary Director, Embassy Leisure

Vikram Achanta Founder, Tulleeho and Chef Vikramjit Roy Co-founder, Context Eat

Vinay Parameswarappa Founder, Gully Tours

Vinesh Johny Co-Founder, Lavonne Academy of Baking Sciences and Pastry

Vini Bhide Culinary Student

Wilson Rajan Co-founder, The Spice Circuit

Yash Bhanage Founder, The Bombay Canteen, O Pedro, Bombay Sweet Shop, Enthucutlet

Yash Kate **Culinary Student** 

Yash Kotak Co-founder and CMO, Bombay Hemp Company (BOHECO)

Yashraj Satwara **Culinary Student** 

Zamir Khan Chief Executive Officer, Saj Hotels Pvt. Ltd.

Zeba Kohli Chocolate Taster and Consultant | Author and TV show Hos



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*Rushina-Munshaw Ghildiyal* Curator & Editor-in-Chief



*Shivani Unakar* Editorial Consultant



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*Poorvi Agarwal* Editorial Intern



**Preetish Priyadarshi** Editorial Intern



*Priya Patel* Editorial Intern



*Neha Jain* Editorial Intern

# EDITORIAL CONTRIBUTORS



Anindya Sunder Basu & Madhushree Basu Roy Founder & Chief Visual Artist, and Art Director, Pikturenama Studios

Anindya and Madhushree were the force behind collating the Regional Overviews section.



Anubhuti Krishna Independent Food Writer, Consultant and Chronicler

Anubhuti has written two deep dive essays this edition - Taste the World with a Finger Tap! and Baked and Buttered - the Evolution of Indian Baking and Pastry.



*Ruth D'Souza Prabhu* Independent Journalist and Food Writer

Ruth has written two deep dive essays this edition - The Enduring Magic of Millets and Shaken and Stirred - The Evolution of Cocktails in India.



*Roxanne Bamboat* Independent Writer and Blogger at The Tiny Taster

Roxanne has written the deep dive essay — Travelling for Taste.



Shanti Petiwala Culinary Chronicler and Editorial Consultant

Shanti has worked on the report's survey and has been a subject matter expert regarding editorial aspects of the report.



*Shivani Unakar* Food Researcher and Writer

Shivani has written the deep dive essay — Tribal Cuisine: The Final Frontier of Flavour and has been a subject matter expert for many aspects of the report.



Notes

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# Burvey design Rushina Munshaw-Ghildiyal

Research and data analysis

Research and data analysis A Perfect Bite Consulting LLP

Vikhroli Cucina

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Website
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https://www.instagram.com/vikhrolicucina/

#### **Producer & Publisher**

Corporate Brand & Communications Team (Godrej Industries Limited and Associate Companies)

**Design & Layout** 

Elixir Intergrated Brandcomm