

FOOD TRENDS REPORT 2022

COLLECTOR'S EDITION

WHAT'S COOKING INSIDE?

- INTRODUCTION
- ABOUT THE REPORT
- TOP TREND PREDICTIONS FOR 2022
- REGIONAL OVERVIEWS
- GLOBAL OVERVIEWS
- DINING-IN
 - Desi vegetables - An Ayurvedic Classification of Groups
 - Desi Vegetables - Looking Back
 - Desi Vegetables - Looking ForwardTRENDS
 - Alternatives to Home Cooked Meals
 - Food Trends at Home
 - Food Categories in Focus
 - Cooking Mediums
 - Kitchen Appliances/Tools
 - Snack/Convenience Foods
- DINING-OUT
 - Mapping Indian Chicken Dishes
 - The Rise of Chicken - Looking Back
 - The Rise of Chicken - Looking ForwardTRENDS
 - Cuisines in Focus
 - Menu Inspirations
 - Restaurant Concepts
 - Food Categories in Restaurants
- BEVERAGES
 - Evolution of Indian Coffee
 - The Rise of Indian Coffee - Looking Back
 - The Rise of Indian Coffee - Looking ForwardTRENDS
 - Beverage Trends in Home Kitchens
 - Alcoholic Beverages
 - Non-Alcoholic Beverages
- DESSERTS
 - Mapping Indian Mithai
 - Indian Mitha i- Looking Back
 - Indian Mithai - Looking ForwardTRENDS
 - Dessert Trends at Home
 - Dessert Trends from Outside the Home

- HEALTH, HYGIENE AND LIFESTYLE
 - Dietary Fats of India - Visual Spread
 - Dietary Fats of India - Looking Back
 - Dietary Fats of India - Looking ForwardTRENDS
 - Health and Lifestyle Trends in Home Kitchens
 - Health and Lifestyle Trends in Restaurants
 - Hygiene and Sanitation Trends in Restaurants
- FOOD STUDIES
 - Indian Kitchenware, an Exploration
 - Indian Kitchenware - Looking Back
 - Indian Kitchenware - Looking ForwardTRENDS
 - Food Studies at Home
 - Food Studies Among Professionals
- EMERGING CONVERSATIONS
 - The Evolution of Plant Based Foods in India
 - Plant Based Foods in India- Looking Back
 - Plant Based Foods in India- Looking ForwardTRENDS
 - Food Media Channels
 - Food Travel
 - Fermentation in India
 - Fermentation in India - Looking Back
 - Fermentation in India - Looking Forward

• PANEL OF EXPERTS

• TEAM CREDITS



Survey design
Rushina Munshaw-Ghildiyal



Survey
A Perfect Bite Consulting

INTRODUCTION

The 2022 Collector's Edition issue of the Godrej Food Trends Report commemorates a significant milestone in the report's evolution: its 5th year of publication. We started off small five years ago to capture themes and trends that were visible and new ingredients that were becoming a subject of conversations in the food circles. The objective was clearly to celebrate the burgeoning food space that is so close to all our hearts.

Through the years, we tracked the evolution of food trends, revisited high points in the culinary industry and infused fresh ideas for conversations. The Godrej Food Trends Report over the years became a credible platform to bring out perspectives/voices from across the food space.

I have personally enjoyed tracking the trends and seeing them come to life. 2020 was about eating for comfort. 2021 was about discovering the richness of Indian regional cuisine. And as per the findings currently, 2022 will be about recognising eating for wellness. We will continue to rediscover our culinary roots, savour our oil and ghee, support local, and take pride in all things Indian. The focus will be on traditional food systems, inherent wisdom in culinary practices, and building a connection with what we eat. Well, do read up and share with your friends and families, this curated compilation of all things you want to know about food trends for 2022.

I am delighted to present to you this compilation that has views and thoughts of some of the most important aficionados of the food industry.

Best,



Tanya Dubash

Executive Director & Chief Brand Officer
(Godrej Industries Limited & Associate Companies)

INTRODUCTION

Welcome to The Godrej Food Trends Report (GFTR) 2022 – Collector's Edition. This special issue commemorates a significant milestone in the report's evolution – it's 5th year of publication!

I can hardly believe that it has been 5 years since we began this journey! Created as a strategic initiative by the Godrej Group under our owned publishing platform – Vikhroli Cucina, with a vision to catalyse conversations and build a community in the Indian food industry, GFTR has grown in scope and stature, year on year!

This study of trends is a continuous process that Rushina and team map. Each year, the report adapts its scope to incorporate the findings derived from an in-depth process involving questionnaires, in-person interactions, and submissions from some of the best-known names from the food industry.

2022 marks a paradigm shift in perceptions around Indian Cuisine both at home and abroad. Food today occupies a crucial space - is the cornerstone of mindful living, for individual and global health, is a pillar of the economy, and is a crucial source of livelihood. This Collector's Edition covers all these aspects, with rich insights gathered from a panel of 200+ notable global voices. Additionally, we are really excited to add a series of special subsections or Culinary Deep Dives this year. Each of which is an informative exploration into specific topics that have prevailed across the past four editions.

Just to give you a sneak peek, my favourite trend this year is our growing **Pride in culinary identity**; this dawning awareness of the true richness of our culinary heritage and the inherent wisdom that is found in our traditional culinary practices is the way forward for us as individuals as well as for our planet. That said, let me not take too much of your time, please turn the pages to make your own discoveries!

I take this opportunity to thank all our contributors, collaborators, designers, advisors, teams who have worked on this edition, and most importantly Rushina, of course for leading the efforts on curating this Collector's Edition

Cheers and take care!



Sujit Patil (@sujitpatil)

Vice President & Head – Corporate Brand & Communications
(Godrej Industries Limited & Associate Companies)



ABOUT GODREJ FOOD TRENDS REPORT 2022 - COLLECTOR'S EDITION

It is my pleasure to welcome you to this very special Collector's Edition of the Godrej Food Trends Report 2022. Which could not have come at a more perfect time!

The pandemic brought an unanticipated paradigm shift to the global food industry. But the silver lining is the exciting future for Indian Cuisine, in its wake. As we go to print, research by Chef Pencil, an Australia-based food magazine, puts Indian cuisine's popularity on Instagram at second only to Italy! This shift in global perception around Indian food is thrilling!

It means Indian cuisine is throwing off stereotypes and being recognised for its nuanced complexity. A movement of self-discovery we have observed growing in the Indian Culinary Scape over the past four editions. In 2018 we saw the first evidence of interest in India's diverse culinary culture with curiosity around regional Indian cuisine burgeoning. In 2019 that early curiosity grew, into deeper explorations of micro-regional cuisines. Which ignited interest in rediscovering traditional ingredients, cookware, and fats. 2020 brought the pandemic that changed everything globally. In India, the home kitchen came into focus, and we began to rediscover our roots. In 2021 this crescendoed into the renaissance of regional Indian food discovery, as we reclaimed our culinary heritage. And now we are looking forward to 2022!

And so, without further ado, I offer you the Godrej Food Trends Report 2022 – Collector's Edition. A 95+ page extravaganza that I hope will be on every food professional's reading list in 2022! Our brand-new Global Overview section has some of India's brightest shining stars from the global diaspora sharing their views. As we enter a period of recovery and rebuilding, our panel has weighed in from across the industry. And the message is clear, 2022 will be the year of food for wellness. We also observe that food study will be an area of serious investment. And our brand new section on Food Studies aims to track and report on this. And finally, is what makes this Collector's Edition truly special - The Culinary Deep-dives you will find in each section! Rich with visuals and insights these explorations cover a gamut of topics like the rise of Desi Vegetables, Indian Chicken, Coffee, Mithai, Kitchenware, Plant Forward foods, and Ferments!

Curating this edition of the report - the most challenging edition heretofore - has been a privilege and a pleasure. Research for the annual Godrej Food Trends Report is a continuous process, approached from the lens of past, present, and future at my end. And like each year, this edition is rich with insights. But it is also bursting at the seams with exciting new food for thought! Behind the scenes, my team and I are grateful to have had an opportunity to seriously study aspects of Indian Cuisine that have not been explored before and connect with some truly brave and inspiring people!

With this, and a fervent wish to meet you over a meal and a conversation in 2022, my annual journey with this report ends. And yours begins...



Rushina Munshaw Ghildiyal

Curator and Editor In Chief
MD, A Perfect Bite Consulting

GODREJ TOP TREND PREDICTIONS FOR 2022



ARTISANAL ICE CREAM WILL BE 'COOL'

A growing desire for real food with real ingredients has created a shift in the segment of ice cream and frozen dessert, bringing artisanal ice cream into the limelight. Innovation and small-batch production mean endless possibilities, with organic milk, indigenous ingredients, and diet specific offerings like high protein, probiotic-rich, diabetic-friendly and more. Ice cream lovers will get their fix of fun with a topping of health!



BURGERS AND SANDWICHES, REINVENTED

With in-home dining continuing to be the preferred choice chefs, restaurants and cloud kitchens have found a new muse in humble burgers and sandwiches, a category that lends itself to packaging and transportation and is rich with potential for innovation. From house-made breads and spreads to vegan and plant-based patties and gourmet meats, 2022 will see the industry laying out a smorgasbord of alternatives in global flavours on burger and sandwich menus.



DEMAND FOR CLEAN, HYGIENIC PACKAGED MEAT

In the wake of the pandemic, protein's strong link to immunity-boosting has come to the fore. A growing focus on quality protein intake will see consumers increasingly seeking clean, pedigree, untouched hygienically packaged poultry, meat and seafood from sanitised facilities and trusted sources and direct-to-consumer delivery formats to bring them to the home kitchen.



GROWING INTEREST IN TRIBAL CULINARY CULTURES

2022 will see a lot of effort invested into documenting native cultures, understanding the nutrition and science behind inherent practices, preserving and propagating native produce and ingredients through Geographical Index (GI) tagging.



PRIDE IN CULINARY IDENTITY

A dawning awareness of the true richness of our culinary heritage, the inherent wisdom around wellness that is to be found in traditional culinary practices, an inward focus on study and documentation of culinary heritage at both the individual and professional level are all driving a new and wonderful sense of pride in culinary identity that we will see manifest into rich opportunities for discovery in years to come.



DESIRE FOR NUTRITIONALLY CONSCIOUS SNACKING SOLUTIONS

Until now, the focus was on comfort and indulgence. As flexible routines continue into 2022, and wellness becomes a top priority, snacks snacking solutions that address individual preferences and nutrition requirements are set to explore. Expect to see protein-optimised, millet- and seed-enriched, superfood-fortified, sugar-free, gluten-free, vegan and other options hit shelves.



FOOD FOR WELLNESS IN FOCUS

2020 was about eating for comfort. 2021 was about discovering the richness of Indian regional cuisine. 2022 will be about recognising eating for wellness. We will continue to rediscover our culinary roots, savour our oil and ghee, support local, and take pride in all things Indian. The focus will be on traditional food systems, inherent wisdom in culinary practices, and building a connection with what we eat.



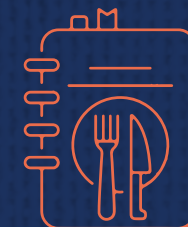
INDIAN SPIRITS IN THE SPOTLIGHT

The wave began with craft gin, expanded into whiskey then rum and beyond, the excitement around artisanal has been growing in the Indian-made foreign liquor (IMFL) segment with a definitive shift towards made in India. Expect to see explosive growth in the segment from homegrown Indian brands, even as indigenous Indian spirits like feni and mahua, once categorised as country liquor, are gaining a strong footing in national and global markets.



INGREDIENT AND PROVENANCE DRIVEN MENUS

Conversations about the origin of our ingredients have been gaining traction among consumers and the industry alike as we engage more intimately with our food. Add to this a government push for recognition and support of native food products, through GI tags and other initiatives. All the signs point to 2022 bringing the value of provenance on restaurant menus into sharp focus, with local, sustainable ingredient-forward dishes.



PROLIFIC INNOVATION IN THE VEGAN FOOD SPACE

With chefs, restaurants and consumers all becoming increasingly conscious of the impact of our food systems on environmental wellbeing, conversations around vegan practices have been growing. The consumer will demand more in the category and the industry will invest heavily in delivering up plant-based, vegan-friendly options for diners of every persuasion, vegan, vegetarian or reducetarian.



PROTEIN WILL BE THE BUZZWORD

As protein becomes a buzzword in mainstream conversations, thanks to linkages to immunity-boosting wellness, and nutrition, protein will no longer be the sole premise of those looking to build muscle tone or body mass but be in focus for everyone who is conscious of overall wellness, health and immunity. Protein-rich foods, like paneer, chicken, seafood, meat, legumes and plant-derived protein foods, that are quick to cook and adaptable to flavour will see huge demand in 2022.



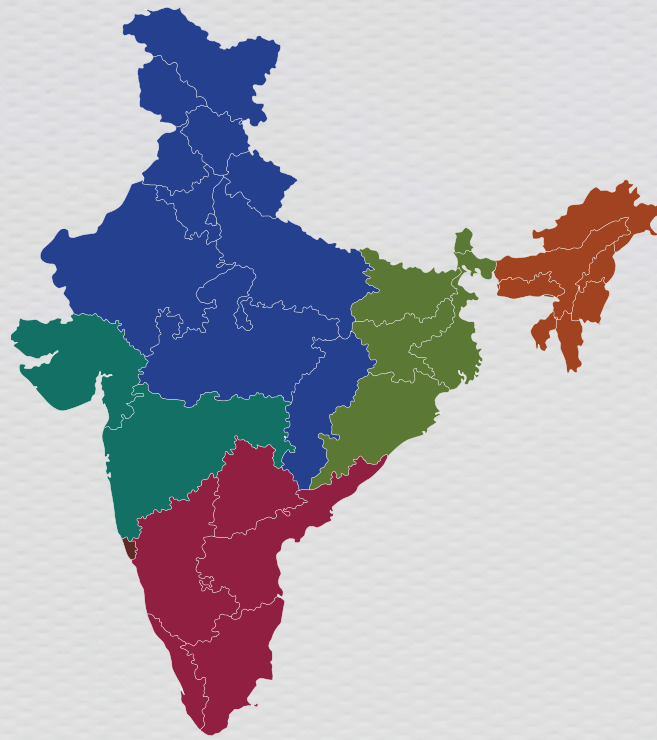
SHIFT TO REGULAR ROTATION OF DIETARY FATS

The increased focus on eating for wellness coupled with a deeper exploration of traditional diets, and cooking practices has brought dietary fat into sharp focus. Consumers will focus on integrating a diversity of fats into their diet and home kitchens will see a regular rotation of oil and ghee with the intention of increasing flavour and boosting nutritional value of food.



REGIONAL OVERVIEWS

The pandemic impacted our lives in many ways, bringing an unanticipated paradigm shift in the food industry and our food systems at large. The silver lining in all of this is that it forced us to reframe our priorities with a keen mindfulness towards personal health and environmental resilience. Our regional panel weighs in from all over India and the message is clear; across the industry and home kitchens, 2022 will be the year of food for wellness, a mindset that will prevail into the years to come.



NORTH AND CENTRAL



Anubhuti Krishna
Food Writer and Chronicler

In North and Central India that focussed more on taste and flavour until now, the focus has moved to nutrition and the impact of our eating habits on our health.

In the home kitchen, the demand for clean, organic, chemical and sugar free food is at an all time high, and supply is steadily growing to cater to all segments. More and more people are turning to vegetarian and vegan diets and organic grains and produce. We are also discovering the inherent wisdom in our traditional culinary practices. All of this is reflected in changing landscapes. Home chefs that rose to meet requirements in recent years, have adapted very agilely to these changing demands, offering up ladoos and pinnis to replace cakes and cookies. In home kitchens, heirloom regional home recipes made by dadis and nanis are finding favour over fancier foreign cuisines; ancient and traditional food practices are also making a comeback.

With dining out, the trends are not as apparent with diners still wanting restaurant food to look and taste exotic and special, but there is a definite shift in focus here too. Chefs, restaurateurs, bartenders, mixologists, confectioners, are all leaning towards local, seasonal, regional produce and flavours even while offering foreign cuisines and modern flavours. Most new restaurants and cafes are now focussed on regional cuisines, vegan menus, sustainable practices, local, regional produce. Some restaurants are sourcing ingredients from farmers as far off as Bengal and Odisha in their conviction to serve up organic, authentic, heirloom foods. In the past year we have seen increasing numbers of young people turning to urban farming and using cleaner, more sustainable farming practices. And collaborating with young chefs and restaurants to bring this produce to the discerning diner.

SOUTH



Ruth D'Souza Prabhu
Independent Journalist and Food Writer

In Southern India, a return to roots began even before the pandemic, with more folks feeling encouraged to deep dive into their regional and micro cuisines with time on hand. The pandemic accelerated this deep dive, turning the focus onto the therapeutic nature of food. The curative properties of crushed fresh pepper in a rasam, the drizzle of a teaspoon of coconut oil - a source of good fat - in a sambar, ajwain leaf fritters that are delicious as they are healing and more have adorned plates and instagram feeds in this time.

Home chefs ensured that their food was equal measures of health and indulgence in a meal. Pantry ingredients that packed the goodness of homemade soups, curry mixes, pickles and more became popular. Restaurants followed suit with the rise of cloud kitchens, many with curated menus of regional food, quite different from their kitchen's offerings. The focus once again is healthy, homely food.

With cities easing restrictions, more and more organic and plant-food based restaurants have opened up to happy hordes, all of whom are looking for cleaner, healthier, environment-friendly dining options, a trend we are going to see more of in the coming months.

EAST



Anindya Sunder Basu
Independent food writer and Photographer

Food is more than just ingredients coming together in a pan over a flame to tempt our taste buds. The pandemic reinforced this in many ways. In the East we have always had a rich bouquet of seasonal produce that is cherished and celebrated. And the local food and beverage industry reinvented itself to draw on this and offer up inventive new offerings in this time.

Home chefs, cloud kitchens, takeaways and food on wheels became an inevitable part of existence. But the focus on health has brought superfoods, immunity boosters and shak-shobji (green leafy vegetables) back onto our plates along with turmeric, ginger, lemon and more. The demand for local seasonal ingredients such as indigenous grains, local honey and unadulterated nolen gur are visibly higher than ever!

Home kitchens, chefs, restaurants, sweet shops, wedding caterers everyone will have wellness and health in mind and on the menu in 2022. And local and seasonal specialties valued for their immunity-boosting properties such as moringa flowers, guavas, green onion stalks will see themselves on restaurants menus. As will Kombucha and other fermented drinks, signature cocktails using desi ingredients like raw turmeric, butterfly blue pea flowers, desi ingredient-based and house-made mixers.

NORTH EAST



Kashmiri Nath
Food Consultant & Chronicler

In the North East, mindful consumption of food, dishes backed with cultural stories, nostalgia and sustainability are the theme of the times. The desire for wellness has led us all to seek traditional food that has sustained our ancestors for centuries.

Eating in is more in vogue than eating out. The emergence of home chefs is gaining popularity as consumers look for food steeped in nostalgia and homeliness. Fermented food and drinks are not a fad any more but have captured the taste buds of the younger generation too. With travel

still restricted people continue to explore via their plates, looking for new exotic flavours discovering regional food with fervour.

At home people continue to connect over food by cooking family recipes, looking inwards, rediscovering forgotten recipes, and savouring local produce that had been neglected such as a rise in demand and consumption of local and artisanal grains here. Eating out on the other hand will be experiential and more vibrant. Back-to-roots dining and conscious and sustainable eating will continue to woo diners. Open air dining spaces are here to stay, restaurant menus will be pared down but offer local fare alongside standard menu items. Diners will seek comfort in eating food prepared with hyper-local, sustainable ingredients. In this topsy-turvy unpredictable world, people will continue to seek comfort in sharing meals and the sense of hope it brings.

WEST



Roshni Bajaj Sanghvi
Food and Travel Writer and Restaurant Critic

In Mumbai and Goa, Pune and Vadodara, the attention to nourishment is in focus; the wellness industry is booming. As restaurants tentatively reopened, we found menus marked with food for immunity, and wellness. Salads and smoothies became popular, more of us looked to veganism than ever before. Hydroponic farms flourished. As we go into 2022, the home kitchen is looking at traditional remedies with renewed respect, and exploring ways in which we can help our bodies with foods we find in our kitchens. With limited travel, we focused on the richness of local cuisines, and eating for the season. We started looking at wellness in a more holistic way, eating clean became more important than eating light. We sought out probiotic foods like kombucha, and kefir, we became familiar with good bacteria and what it does for overall health.

As we look to take care of our bodies we are more conscious of where our food comes from and what it does to our bodies. Zero-proof drinks are showing up on bar menus and in our shopping carts. We are aware of what sugar in any form does to our bodies, and both snack companies and mithai shops are offering up 'naturally sweet' or 'no sugar added' treats that will not make us feel entirely deprived. We have become more responsible eaters, mindful of not only our health but also a small shift in awareness on how our consumption might affect the health of our environment.

GLOBAL OVERVIEWS

Indian cuisine has always held a global position, but recent years have seen a shift away from existing stereotypes. A growing awareness of the nuanced complexity of Indian culinary culture, and respect for inherent wisdom of traditional food systems, is driving a reframing of perceptions around Indian culinary culture, driven by voices; chefs, restaurateurs, entrepreneurs and food writers, from across the globe, who are playing critical roles in changing the narrative. Here is what some of them have to share with us -



Chef Helly Raichura
Owner and Chef, Enter
Via Laundry Australia

We are now seeing some very knowledgeable chefs and cooks starting to reflect back on our rich and vast cuisine. We are learning, documenting and sharing recipes, techniques and food philosophies of our landscape and most importantly cooking from those learnings. In a global setting I see our cuisine gradually starting to move from the position of being influenced to influencing and educating other popular food cultures. There is also a lot of buzz around single origin produce, sustainability and seasonality. I am sure our elders, who have been talking and practicing these same concepts for ages, will be happy to finally see these basic Indian food philosophies that have always been common sense for them are now trending.



Vidya Balachander
Editor — South Asia, Whetstone
Media Middle East / South Asia

As the editor of Whetstone's South Asia vertical, I would say that Indian foodways are moving, albeit slowly, from being represented in a limited, reductionist way in global food conversations to being respected in their complexity. We shouldn't forget that in 2021, it was still possible for the Washington Post to publish a food column that claimed that Indian food is made of one spice. However, on balance, Esquire's 2021 American restaurant of the year was an Indian one — Dhamaka in NYC. Keeping these dualities in mind, I am cautiously optimistic that Indian food and beverage will come into its own and be represented in its boggling complexity. It's time for an educated clientele to meet it on its own terms.



Dr Krishnendu Ray
Professor, Department of Nutrition
and Food Studies, New York
University North America

Conversations around Indian food are picking up in the global forum. I see a focus on ingredients such as turmeric, moringa, and various kinds of spiced chais, backed by a movement of ethical sourcing of spices with young entrepreneurs with strong associations with progressive politics, such as Ethan Firsch of Burlap & Barrel and Sana Javeri Kadri of Diaspora Co. I see themes of superfoods, cleanses and detoxes, with Indian nutritional philosophies like ayurveda being revered for their health claims as alternatives to biomedicine. We are also beginning to recognise the strength of a vegetable and legume forward cuisine, which interestingly, can be associated with the UN Sustainable Development Goals and climate change. This growing conversation is reflected across media, with novels and stories relating to the Indian diasporic experience that weave in themes of food culture, and through the work of several food writers of Indian origin like Tejal Rao, Priya Krishna, Mayukh Sen and more in American newspapers. All of which will have an impact on visibility and specificity soon. Indian restaurant foods and cookbooks are also having a moment with more and more showing up in National and Global Top 10 lists.



Sandeep Pandit
Creator, 'The Spice Angel' Australia

We seem to be moving towards a more refined knowledge of Indian food – I have witnessed it first hand in MasterChef Australia and more recently, while hosting 'India Unplated'. The conversations have moved away from 'curry' to regional Indian cuisine. Some of the best chefs I interact with, are making big efforts towards understanding Indian food techniques. Conversations exploring Indian food being an awesome choice for vegetarians and vegans are also growing. I am also seeing an increased appreciation for high quality Indian spirits!

With the world still grappling with the pandemic, 2022 may not be the year that Indian food reaches its pinnacle but a strong foundation is being laid for the years to come. With global names like Gordon Ramsay, Jamie Oliver, Gary Meghan, David Rocco and others showcasing Indian food on their creative channels and on their restaurant menus, the world is slowly awakening to the complex kaleidoscope of flavours, that is Indian Food & Beverage. Overall, the next 10 years will see a huge rise for the Indian food scene across the globe.



Chef Rohit Ghai
Chef Patron at Kutir, Chelsea
and Manthan, Mayfair - UK

Indian food is one of the most popular cuisines in the world and never more so than at the moment. What I'm enjoying is how far other audiences have come - they now know that there's a real regional breadth in Indian cuisine, and we're beyond the classic westernised curries. Veganism is what we're all talking about in London. Audiences know that Indian food has great healthy, vegan, veggie dishes too, so we're excited to be able to offer vegan tasting menus with lots of variety in my restaurants. We're also talking a great deal about sustainability and regenerative farming. It's a really pivotal time for food and agriculture, and restaurants have to be part of that conversation. I released my first cookbook, Tarkari (meaning vegetables in Urdu), in late 2021 and this book is dedicated to the vegetarian and vegan recipes from my past, celebrating the amazing way Indian vegetables are cooked and enjoyed traditionally.





Chef Manish Mehrotra
Corporate Chef, Indian Accent
Restaurants, New Delhi & New York

I think Indian food is making more progress in the world. Indian food is no longer just take away, mom and pop store food or a Bangladeshi restaurant, it is also fine dining. Indian restaurants are now making it to different lists and becoming more popular and this is beyond just in London and New York! Indian food is making inroads in Tokyo, Melbourne and other cities around the world. And Indian food is now gaining a more positive reputation in terms of cuisine. People's perceptions towards Indian food have changed, Where once it was perceived as 'throw everything in a pot and eat it with a Naan' or that it's just about chillies and spices which nobody understands outside India. Today there is research and a historical background being added to Indian food and people are more knowledgeable about the regional Indian cuisines.



Chef Vikas Khanna
Celebrity Chef & Restaurateur,
Vikas Khanna Group

I see a big shift happening in the Indian Food Scene in the U.S. Restaurants like Dhamaka or Sema are serving up absolutely authentic food and for the first time an Indian restaurant has been mentioned in the 21 Best Restaurants in New York times. Even Michelin! 10-12 years ago there were so many deserving restaurants but such a lack of diversity in the concept of whom they gave the Michelin award to. It was very hard to impress the inspector, because there was a shortage of diversity in their acceptance. But that has really changed. Now I see deserving restaurants beyond those that serve the Caviar and shaped truffles, serving authentic food, getting a voice. I am seeing that Indian food which was seen from a very small lens of North Indian cuisines, is growing and for me that's a big big present conversation. To me authentic is an important word for 2022, it means history, lineage of recipes, stories and memories. And bringing Authenticity back to Indian cooking, is a very important global conversation right now. Because when you open restaurants in the West, it's modernised, and westernised to the point where it's alien to the native people and I think native cuisine has to be on the forefront. And I am proud to see the new generation of chefs who are bringing out India's regional cuisines!



Chef Atul Kochhar
Atul Kochhar Hospitality Group

Over the past couple of years, with so many having begun to cook more adventurous dishes at home while restaurants were closed during various stages of lockdown, I feel that many people outside India have learnt more about Indian food. Regionality, of Indian Cuisine for instance, has become far more prominent in British restaurants. Where five years ago people in the UK would predominantly order Anglicised versions of classic dishes, I feel that they are now stepping out of their comfort zones. I think this is due to a combination of so many exceptional Indian restaurants now operating, but also due to people cooking at home. Since the first national lockdown, authentic ingredients have been so much easier to get hold of when cooking at home, with many restaurant suppliers delivering to homes, plus the significant growth in online grocery shopping platforms, which is certainly a good thing when it comes to promoting different cultures. I feel that Indian food's position in the global arena will only continue to grow and get better in the coming year as we begin to strive towards some semblance of normality.



Himanshi Munshaw Luhar
Chief Foodie -
Foodie Trails Australia

In Australia we are breaking out of the stereotype that Indian food is cheap takeaway, and recognising it as a refined and complex cuisine. There have been good conversations around nuances of Indian flavours through shows like MasterChef, with ex-contestants and celebrity chefs, talking about their regional culinary heritage. In addition to increasing numbers of street food outlets, South Indian cafes and restaurants opening their doors, modern Indian and fusion Indian flavours are also on the rise with well known chefs shining a spotlight on local Australian produce cooked up with Indian spices and flavours. There is also a rising interest in exploring Indian cuisine from a health perspective, with proteins like lentils and benefits of spices driving a change in perceptions. I see a slow but steady shift from Indian cuisine being stereotyped as just butter chicken, naan, rogan josh and vindaloo, to being perceived as one of complexity and diversity.



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DESI VEGETABLES - AN AYURVEDIC CLASSIFICATION.

Subzi, subji, tarkari, torkari, xaak or shaak, whatever name we might know them by, vegetables have always held their own on the plate in India. Conversations around desi vegetables began in 2018, with the first explorations into regional cuisines. In 2019 we saw chefs put bathua, kathal and tindora on fine dining menus. 2020 saw a definite shift in focus with desi vegetables becoming the new instagrammable 'cool'. An interest that has only deepened in the last two years with supply chains being disrupted, forcing consumer reliance on locally available produce and a growing desire to support local farmers. A growing awareness around immunity and mindfulness and their intrinsic connection to food has also bolstered pride in traditional culinary practices.

And so in this section on Dining In trends, we take a deep dive into the Indian way with desi vegetables. Begin with exploring **An Ayurvedic classification of desi vegetables** in the infographic. Then turn the page to **Look Back** at the historical relevance of vegetables, indigenous vegetable crops and their place in Indian culinary culture. **Look Forward** to the burgeoning popularity of desi vegetables in the year to come. Finally, look at **Dining In trends** that will drive our cooking and eating habits in the home in 2022!

01. Patra shaka (Leafy vegetables)

02. Pushpa shaka (flower-based vegetables)

03. Fala shaka (fruit-based vegetables)

04. Danda shaka (stem-based vegetables)

05. Kanda / Mula shaka (root-vegetables)

06. Samswedaja shaka (mushrooms)



Disclaimer - This representation of desi vegetables is creative visualization and is in no way comprehensive or definitive.



DESI VEGETABLES: LOOKING BACK

INDIAN CULINARY CULTURE HARNESSSED ITS ABUNDANT RESOURCE - ITS PLANT DIVERSITY TO FORGE A CUISINE RICH IN FLAVOUR, TEXTURE AND NUTRITIVE PROPERTIES. PLANT-FORWARD DIETS, EATING ROOT TO FRUIT, REDUCING KITCHEN WASTE, NEVER NEEDED SPECIFIC DEFINITION BECAUSE THEY ARE CENTURIES-OLD LIVING PRACTICES.

UNPARALLELED DIVERSITY OF EDIBLE PLANTS

Vegetables have always held their own on the plate in India, adding variety, colour, texture, taste and most importantly, essential nutrition in the form of subzis, raitas, pickles, chutneys and salads. Sadly, despite being omnipresent, they seldom get their due.

Culinary cultures evolved as a result of specific geographies, climates, and natural resources. Where meat was abundant, it dominated the plate, along coasts, seafood ruled menus. By that measure, India’s richest resource is its plant diversity. Recognised as the 8th most

biodiverse region globally, India boasts thousands of edible species of plants from 184 families in its culinary repertoire. And even meat and seafood-centric regional cuisines have plant foods making up a large part of the plate.

THE ROLE OF VEGETABLES IN TRADITIONAL DIETS AND MEDICINE SYSTEMS

Traditional systems of medicine that evolved in India, like Ayurveda, Unani or Siddha, all emphasise the connection between healthy digestion and wellness. “Ayurveda is all about digestion” states Anushruti, food writer and health and well-being consultant, “and vegetables are actually difficult to digest so Ayurveda places a lot of emphasis on when and how vegetables are consumed. It’s important to cook them with the right amount of fat and spices for us to digest and absorb their benefits.”

all. Diet and food needs to be based on an individual. We take three things into consideration when deciding menus. The season, the region and the reason. What is recommended or cooked depends on what is in season, what is available locally, and when cooking, the reason for using a specific spice or a particular cooking technique,” shares Chef Dr Izzat Husain, passionate Chef & Unani Doctor.

With an aim for every morsel to sustain and optimise wellness, Indian dietetics predate, and therefore are limited by western nutrition frameworks that are based on meat-centric diets and focus on macronutrients. Micronutrients, of which

vegetables are largely the source, particularly in India, have been overlooked. So too have inherent traditional wisdom around functional nutrition and bioavailability from food pairings, honed over centuries. “Micronutrients that are responsible for functions like boosting immunity and protection from chronic diseases, are predominantly found in the fruits and vegetables,” points out Nutrition and Wellness consultant Supriya Arun who has been studying the subject, “we have such wealth of knowledge about effective seasonal practices and nutritive properties in India, but this information is all locally available and scarcely documented,” she laments.

TRADITIONAL VEGETABLE CONSUMPTION PATTERNS ACROSS INDIA

Over centuries, Indian cuisine has developed a unique vegetable consumption pattern based on a seasonal calendar that follows an annual cycle of foraging, planting, harvesting, cooking and preservation of edible plants.

These systems are so well-defined that consumption practices, many rooted in Ayurveda, exist for everything. “Ayurveda, classifies vegetables

into 6 categories in order of digestion. Patra shaka or leafy vegetables top the list and are easiest to digest followed by Pushpa shaka (flower-based vegetables), Fala shaka (fruit-based vegetables), Danda shaka (stem-based vegetables), Kanda or Mula shaka (root-vegetables) and Samswedaja Shaka (mushrooms) which are considered hardest to digest,” shares Anushruti. Seasonal

vegetables are nature’s way of fortifying nutrition, and traditional diets incorporate everything locally available in season. “The Ayurvedic lifestyle places a lot of importance on Ritucharya (seasonal routine) advising diet changes with the progression of seasons, and specific vegetables to be consumed at specific times,” she enlightens.

A BOUNTY OF TEXTURES, FLAVOURS AND NUTRITION

There are as many dialects in Indian cuisine as there are regional kitchens. Vegetables feature prominently across all of them. Leafy greens, gourds and root vegetables are much favoured.

monsoons. “Monsoon vegetables are especially rich in immunity-boosting anti-microbial and anti-inflammatory properties and nutrients like beta-carotene,” points out Arun.

Greens are intrinsic to the Indian diet. “They are high in fibre and promote a healthy digestive system and also contain phyto-chemicals such as luteins and indoles that are good for the heart,” observes Arun. No surprise then that hundreds of greens are eaten in India year-round, even in the

Doodhi, ridge gourd, snake gourd, pointed gourd, ivy gourd, teasel gourd, the pumpkin family and other vegetables that are the fruit of creepers and vines are highly valued in Indian cuisine. “Gourds are given a lot of importance in Ayurveda and considered superior to other vegetables,” observes Anushruti. “Ash Gourd in particular is

considered good for all the three doshas and valued for its medicinal properties.”

Tubers and roots are possibly the most loved category of vegetables in India. “Tubers and roots are considered very difficult to digest. They increase the vata dosha in the body, but Ayurveda is all about balance and it recommends cooking these vegetables in mustard oil with ginger as both of these balance the qualities of vata,” shares Anushruti.

ZERO / NO WASTE KITCHENS

Indian culinary culture has root to leaf eating at its very ethos. Roots, stems, leaves, flowers, fruit, pods and seeds are all consumed throughout the plant life cycle. Even peels and stems that would be discarded are used. And what is not edible is turned to compost for the garden.

Excess produce is dried, pickled, preserved, or fermented based on the climate. Drying vegetables is a practice followed across many parts. “A 100 years ago we could not predict monsoons, so people were always prepared. Everything from tomatoes to parwal and karela and even onions and potatoes were sliced and dried. As were many green leafy vegetables, some would be pounded into powder to be cooked with rice water as a substitute for dal when it got expensive,” shares Shwetha Mohapatra, Creative Director, and Food writer.

Interestingly, flowers, from pumpkin and onion to neem, tamarind, kachnar, banana, and more, are eaten all over some for taste, others for their nutritive properties but rarely get mentioned. “In the North East we eat many flowers,” shares Assamese home chef Gitika Saikia, a pioneer in the space who put indigenous plants on her pop-up menus almost a decade ago. “In Assam, Indian Sorrel and Roselle flowers (Tenga Mora) are used for souring fish curry. In Manipur mustard flowers are made into a bitter soup and consumed for their medicinal properties.”

“In Chattisgarh, traditionally we dried Sukhsi saag in the winter, everything from tomatoes, brinjal, broad beans and yams to Tiwra bhaji or pea greens which are rehydrated in hot water and cooked in lean seasons,” reminiscises regional food chronicler Garima Tiwari. And because drying changes the textures and flavours of vegetables, this adds another

category to the vegetables repertoire. Dried vegetables have a cult-like following, from the Hokh Syun of Kashmir, Sukhsa of Uttarakhand, Ker Sangri of Rajasthan to Vathals of the South!

Desi vegetables first popularised by chefs like Manu Chandra and Manish Mehrotra showcasing vegetables like bathua and kathal on fine dining menus almost a decade ago have been brought sharply into focus post pandemic. The Indian food space is recognising that everything in the Indian meal construct has a benefit. And a lot of work is underway to document and validate traditional knowledge with modern nutrition and science.



DESI VEGETABLES: LOOKING FORWARD

A MOVEMENT IS UNDERWAY ACROSS THE INDIAN FOOD INDUSTRY TO SAVE, REVIVE, AND PROMOTE NATIVE PLANTS, FOODWAYS AND DEBUNK MYTHS AROUND DESI VEGETABLES.

INDIA IS PLANT-FORWARD

India’s plant biodiversity has shaped Indian culinary culture but seldom received it due. Chefs, farmers, seed savers, educators and chroniclers across India are working to revive native plants and document traditional food knowledge.

“Today vegetarian and plant-based are buzz-words globally but have been a very ancient tradition in India. Indian food has been stereotyped into 8-10 dishes until now. But the world is beginning to understand the huge spectrum that is Indian

food and its massive foundation! And that some Indian regional cuisines are actually just vegetarian with vegetables being the wholesome and amazing main dish, not sides!” shares international celebrity chef Vikas Khanna, with pride.

IT BEGINS WITH AWARENESS

“I’m just blown away by the sheer diversity of produce we have!” exclaims Chef Thomas Zacharias who began travelling in 2013 to document India’s culinary heritage, and has been at the forefront of evangelising consumption of native produce via his menus and social media, using the hashtag #KnowYourDesiVegetables. “It took travelling and interacting with chefs abroad for me to realise that there was something amiss in the way we interact with vegetables in the modern Indian context,” he reflects. “Globally,

I noticed strong movements aiming to motivate people to become more conscious about what they eat, traditional wisdom, go back to roots and make better food choices. For us, our communities and our environment.”

Fueling such conversations are people like Dr Prabhakar Rao, seed saver and founder of Hariyalee Seeds, which works to create repositories of native plants. Dr Rao’s goal is to bring forgotten plant foods in danger of extinction back onto plates.

“Plant species are disappearing from the face of the earth at an alarming rate,” he observes. Having studied a variety of texts such as the Soopa Shastra, and classic cookbooks like the Tamil Samaithu Paar, by S Meenakshi Ammal in his initial years, he observes, “so many vegetables mentioned in these books were entirely alien to me because they were just gone from the plate!” expressing alarm over the detrimental impact on contemporary diets and incredible loss to the environment.

THE CONVENIENCE VS CONSCIOUSNESS CONUNDRUM

Faster lives and economic downturn have impacted cooking patterns, taste preferences and the nutritive diversity of the Indian diet over the last decade. And chefs, farmers, and experts are particular in pointing out that the onus also lies with consumers who need to be receptive, reflective and action-oriented in

bringing desi vegetables back. “We’ve been hard-wired to crave convenience when we should crave food that is nutritious and better,” muses Chef Zacharias, expressing hope that these behaviours may be unlearned in favour of more conscious engagement with our food systems.

One area of concern post-pandemic is how socio-economic constraints have skewed diets, especially for those with limited access to nutritive produce. “How can we rationalise the argument of making more vegetables a part of the diet?” laments Dr. Pushpesh Pant, eminent food historian. “As

recently as three decades ago, five rupees bought five kilos of fresh green peas. Today they cost more than a hundred! Even people of affluent means watch prices so what do people in lower-income brackets do? The solution according to him may lie in options like the Chandigarh farmer mandis or cooperatives, that bring vegetables to a central location.

As solutions go, it is sound, supporting farmers, cutting out middlemen and encouraging fair trade. And this model is being explored around the country. Spudnik Farms, a network of Community-Supported Agriculture (CSA) farms bring pesticide-free, organic fruits and vegetables to consumers in Bangalore through subscription. “Our model has

gained popularity, especially over the last two years during the pandemic. It’s convenient and allows people to engage in responsible consumption,” explains founder Sumeet Kaur.

GROWING INTEREST IN KITCHEN GARDENING

Another happy fallout of the pandemic has been an upswing in gardening. Chefs are setting up their own farms and collaborating with farmer groups. While consumers are investing time in growing their own produce.

Malabar spinach, among many more.” His ultimate goal is to create a market viable enough for farmers to grow these desi vegetables at a commercial scale. And familiarising people with them, through their own kitchen gardens is a step in that direction. “A lot of my customers resonate with the narrative that these vegetables are a part of their culinary heritage and that they can be involved in their preservation and revival.”

Dr. Rao, believes that growing food can help people appreciate its value, and has been encouraging aspiring gardeners through the pandemic. “I connect with them through my social media, TED talks, videos, meetups, and workshops, and share knowledge on growing desi vegetables like Clove beans, Red okra, Brahmi,

Avid gardener and author of Everyday Superfoods, Nandita Iyer took to urban gardening a decade ago. “Everything was a learning experience. Germinating

and nurturing even the simplest of things like limes and coriander was an exercise in patience. But it helped me realise the value of things we often take for granted.” Gardening also helps us understand seasonality. “Our desi vegetables are locally available and cheaper because they grow abundantly in season. We need to consume them more mindfully, cook the cuisine of our roots but also try to be more versatile so we get a wide spectrum of colours on our plates and different micronutrients and phytonutrients in our diet,” she concludes.”

DESI VEGETABLES WILL BE IN FOCUS

“Globally celebrated chefs like Passard and Redzepi, are pushing simple vegetables to their limits! Why can’t we do the same?” questions independent Chef and Gastronomic Curator Chef Shagun Mehra. She believes Indian chefs must make bold moves to showcase humbler vegetables considered on their menus. “We have to learn to appreciate what we have, and realise that this too is gourmet. Not just truffles from Italy, but baingan, bajra and ponkh and even our lauki is gourmet!”

Chef Thirugnanasambantham of WGSMA in Manipal, which has introduced a Master’s degree in Indian Cuisine and culture, covering regional and sub-regional micro cuisines.

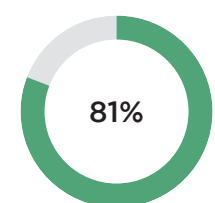
Tribal cuisine is another area attracting interest. India is home to over 50 million tribes with thousands of wild edible plants in their collective repertoire. “Tribal food systems reflect centuries of knowledge that can be harnessed and documented to find solutions to nutritive and environmental concerns” shares Shailesh Awate of Triple OOO Farms, an organisation that works to conserve traditional

ecosystems and indigenous plants. “The Adivasis of the Sahyadris have a traditional diet that is extremely high in nutrition from wild foods and we’ve been encouraging their documentation and propagation.”

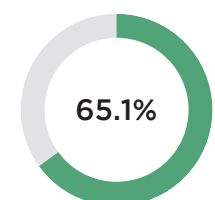
As the dust of the pandemic settles, the benefits of traditional foodways and plant-forward diets are the focus of all conversations, globally, and it looks like India’s humble desi vegetables will finally get their due!



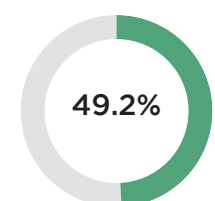
ALTERNATIVES TO HOME-COOKED MEALS



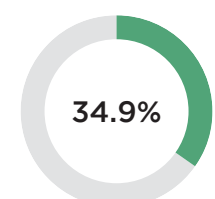
Home delivered meals from trusted sources



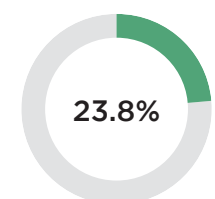
Clean preservative-free convenience cooking solutions



Ready alternatives for traditional Indian meals



Meal subscriptions from trusted sources



Convenient meal options fortified with functional ingredients/superfoods

2022 brings in another period of recalibration - as we re-adjust to hybrid work routines, juggling offline workdays and commutes. The consumer is now keenly focused on eating for wellness. So while the emphasis on in-home dining and home-cooked food will continue with food safety, health and immunity-forward nutrition being high on everyone's agendas, there will be a commensurate increase in demand for convenient solutions. Not surprising then that a whopping eighty percent of our panel predicts that consumers will rely

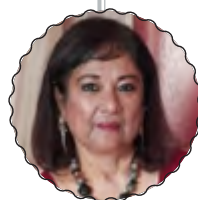
on **home delivered meals from trusted sources**. While 65% feel the focus on health and hygiene will point us towards **clean preservative-free convenience cooking solutions**, such as small batch made spice mixes, sauces, ready to cook meal solutions. Not to be overlooked is our newly discovered pride in regional Indian cuisines, and growing recognition in the inherent nutritive richness of the Indian diet, which are reflected in a growing demand around **ready alternatives for traditional Indian meals**.

Chef Amit Pamnani



Home-cooked meals will still be important, so people might look into solutions like ready-made masalas, gravies, sauces to make their cooking quick, easy and at the same time homemade.

Time permitting, people will seek more local ingredients for healthy meals, but with busy schedules, hygienically packed meals would be a time-saving preference among many.



Odette Mascarenhas

Purna Kumar



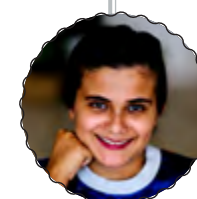
With life returning to a fast pace, we'll be happy to rely on the ease of customisation that subscription apps provide. Clean, preservative-free foods, hygienically prepared meals and other solutions that ensure freshness, quality, local and seasonal food will be top of mind, allowing us to enjoy home-style diets with convenience.

FOOD TRENDS AT HOME

As we enter 2022 consumers have emerged from the last two years with far more exploratory mindsets when it comes to food. An added layer of awareness and determined emphasis on health and immunity-boosting diets, greater economic awareness and environmental consciousness will drive a lot of decisions when it comes to food choices at home. Our expert panel observes a growing desire to explore culinary identity with **rediscovering our**

roots through food, be it that of our family, our community or our own home region. In the same vein, curiosity about culinary cultures one identifies will see consumers indulge in **experimenting with cuisines other than their own**. A happy outcome of the last two years of more attention paid to our cooking and eating habits, is a growing conscientiousness in the kitchen, and a strong focus on **no-waste cooking**.

As lives get busier, a lot of traditional recipes are falling through the cracks. There has been an active and deliberate attempt at valuing and documenting these recipes. In the coming year, will see new ways of making these recipes more adaptable to the modern kitchen.



Aysha Tanya

Chef Rakhee Vaswani

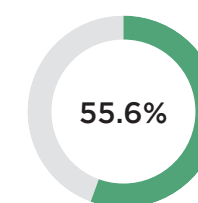


At Palate Culinary Academy, we are offering a number of certificate workshops, diploma courses and internships. I am seeing a lot more interest in learning about food and upskilling among budding professionals and more so among homemakers. Teaching is close to my heart, so this is an exciting time!

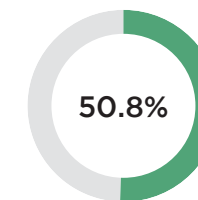
We are rediscovering our roots through food and using this as a means to feel closer with our families, calling aunts and grandmothers for forgotten recipes. And as we try and recreate these heirloom recipes at home, we are finding the need and desire to use traditional utensils, too. Because they enhance flavour, but also because they take us back to the food experiences of our childhoods.



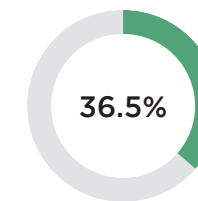
Roopa Nabar



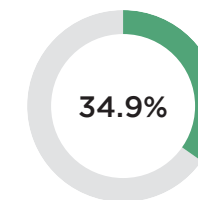
Rediscovering roots through food



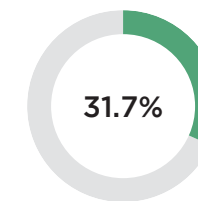
Experimenting with cuisines other than one's own



No-waste cooking



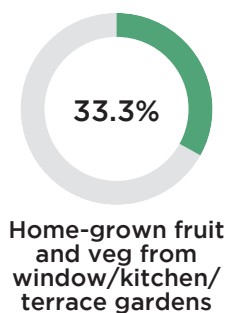
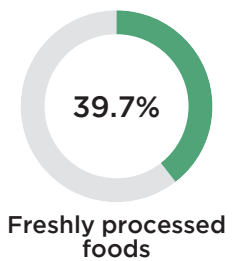
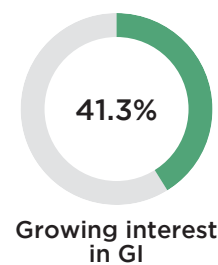
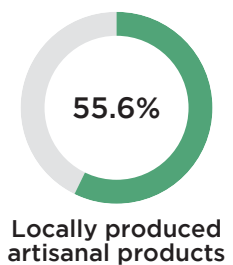
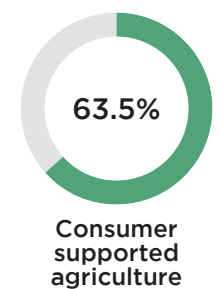
Traditional utensils will become brag-worthy



Food exploration through classes, studies and workshops



FOOD CATEGORIES IN FOCUS



The 2022 consumer will no longer be interested in merely purchasing what is available. Armed with information, perspective and personal beliefs, they will exercise choice and agency when selecting the food categories they consume. With disrupted supply chains during the pandemic, we saw a growth in direct-from-farmer purchasing. In 2022, this will evolve into a growing movement of **consumer supported**

agriculture, where better systems of production can rely on a steady stream of demand. And this producer-consumer relationship will extend beyond farm to fork, as consumers choose to support more **locally produced products**. With closer attention to our food production systems and an interest in provenance, we are also seeing a **growing interest in GI tagged** produce.

Chef Kunal Kapur



While most urban-dwellers have space constraints, a growing number of people are dabbling in kitchen gardening, even if it means just a few vegetables and herbs in pots on their balcony, because the joy of nurturing one's own food and seeing it come to fruition is very fulfilling. It is also making consumers more appreciative of the food systems they rely on.

It is a matter of pride to support local producers and homegrown brands. This also holds true for exotic or luxury ingredients like lavender, vanilla beans from Kerala and Kashmiri saffron, that are being sourced locally rather than imported. Consumers are really excited about this, and are increasingly seeking transparency around the origin and provenance of the foods they enjoy and indulge in.



Zeba Kohli

Afan Basu



With the internet, social media and e-commerce platforms a lot of small farmers and producers can sell directly to customers and I am really pushing for this movement. Buying good quality ingredients directly from producers in the place of origin is a win-win for everyone – the product changes fewer hands, giving the producer better returns, and the consumer an assurance of authenticity.



COOKING MEDIUMS

Growing attention to health, nutrition and immunity requirements, a deeper exploration of Ayurvedic diet principles and increased interest in exploring traditional Indian culinary practices has been driving focus on cooking mediums in the home kitchen year on year. The segment will continue to evolve in 2022, with conversations around the importance of dietary fats for nutrient absorption and rotation of fats in the diet growing. Our panel sees a continuing

focus on **cold pressed unrefined oils**. The inherent health benefits of ghee and its adaptation to modern palates will bring **gourmet premium ghee varieties** into the limelight. In the last half decade, with experts reframing oil and fat from a berated to a beneficial food category, we are also seeing them occupy gourmet segments with more **locally produced premium oils like** Hemp and Avacado oils.

With people wanting to explore micro-regional cuisines, the emphasis on going back to our roots and using traditional fats has come back into focus. There is also more information available today about these traditional fats being good fats, especially if they are used as traditionally intended.



Rakesh Raghunathan

Chef Parvinder Singh Bali

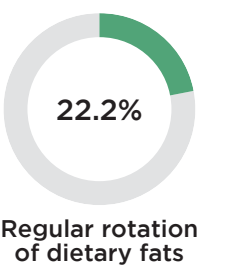
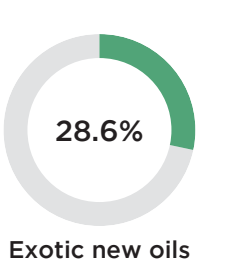
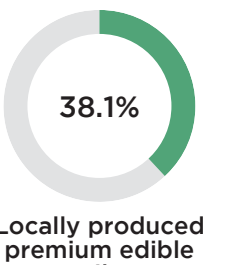
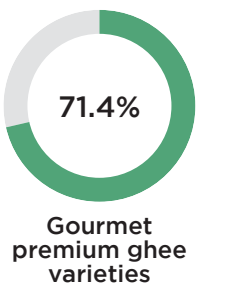
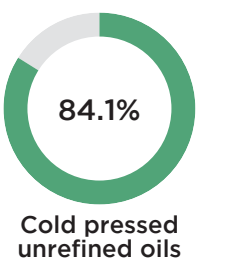


The processing of oils is also something people are talking about much more now. I'm happy to see a lot of well informed Indian farmers placing importance on cold pressing their oil seeds! We are also seeing a lot of these raw oils used not just as cooking mediums but as finishers for flavour or nutrition.

The way edible refined oils have snuck into so many of our processed foods is a concern for consumers, and their adverse side effects on our health are well-discussed today. As a result, consumers will move back to our older ways, using more regional oils. At the same time, exotic new oils which are also healthy fats, like avocado, walnut, etc. will continue to see a spike.



Anusha Murthy

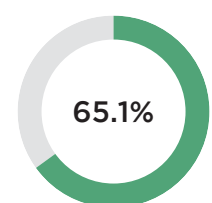




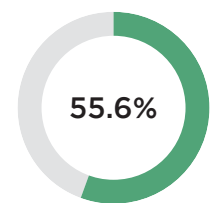
KITCHEN APPLIANCES/TOOLS



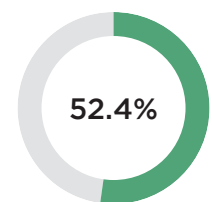
SNACK/CONVENIENCE FOODS



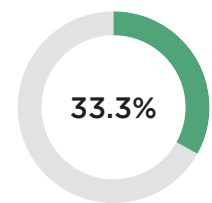
Increasing pride in traditional Indian cookware



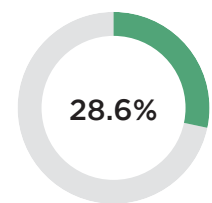
Healthy diet driven gadgets



Time-saving convenience cooking gadgets



Appliances for recreational cooking



Traditional food processing tools & implements

A growing interest in regional culinary cultures, and a focus on wellness will drive kitchen appliance and tools purchases in the year to come. Our panel is excited to see a growing interest around **traditional Indian cookware**. Consumers will invest in kitchen appliances and gadgets for convenience

and time-saving qualities, but also to satisfy specific food cravings or foster newly developed hobbies. With health in sharp focus, our panel also forecasts more **gadgets that can support healthy cooking** and **time saving convenience cooking gadgets** to support newfound need for work-life balance.

Kurush Dalal



Thanks to the lockdowns, people have had the time to pay more attention to food and experiment with vessels. So a lot of people are moving back to cast iron, copper vessels, brass kettles and so on in a big way, even though they require more care and maintenance.

Traditional implements, many of which are suited to small batches, will see a comeback as families try to create their own takes on heirloom recipes and spices.



Deepa Chauhan

Navika Kapoor



While people want convenience, there is also an indulgent side to cooking at home in 2022. Convenience cooking gadgets like dough mixers, and instapots are gaining immense popularity because of their ability to make delicious, healthy meals less labour intensive. Elaborate stews, breads, and batters now take a lot less babysitting and active attention, making it vastly easier to afford the time and energy to prepare these specialty meals.

Busy lifestyles, decreased access to dine-in restaurant options and need to meet individual taste and nutrition requirements are leading more consumers towards snacking, and replacing meals with snacks. Health will continue to be a priority, with snacks meeting important nutritional and satiety fulfilling goals. More than 55 % of our

panel weighed in on **Millet based snacks** becoming mainstays on our pantry shelves, while an equal number have put their votes on **non-fried snack options**. The healthy snack segment is only going to grow with a demand for functional ingredient based snacks as we seek to get the most nutritional benefits from every bite we consume.

More people are leaning towards tradition and nutrition. We are going back to millets in a big way, be it at restaurants, or in home cooking. I am seeing a lot of ready to cook solutions based around various millets or soy protein, and even innovative convenience products like flavoured paneer. Even treats like cakes and biscuits now have more nutritious ingredients like coconut sugar, jaggery, almond meal and so on.



Ameeta Agnihotri

Krish Ashok

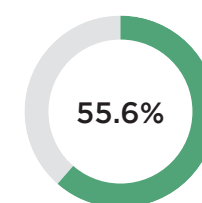


The penetration of e-commerce and digital payments has shrunk distances, so it is indeed easier to order provenance-driven snacks from wherever one is located! Additionally, health will become the single biggest focus of snacks in general, so millets, vegan, keto and diabetic-friendly options will continue to do well.

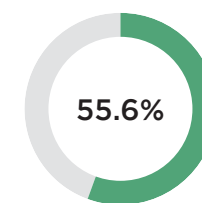
The inability to travel during the pandemic brought in a craving for nostalgic food from all parts of India and now that everyone is online there are several platforms catering to this desire. Millets are growing in awareness as a healthier and more functional and gluten free, so I feel we will continue to see innovations with millets in this segment of food products, among others.



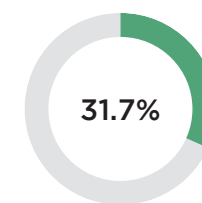
Sharmila Ribeiro



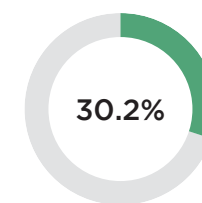
Millet based snacks



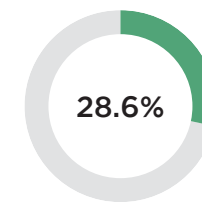
Non-fried snack options



Functional ingredient-based snacks



Ready to cook/eat options



Provenance driven snacks

MAPPING INDIAN CHICKEN DISHES

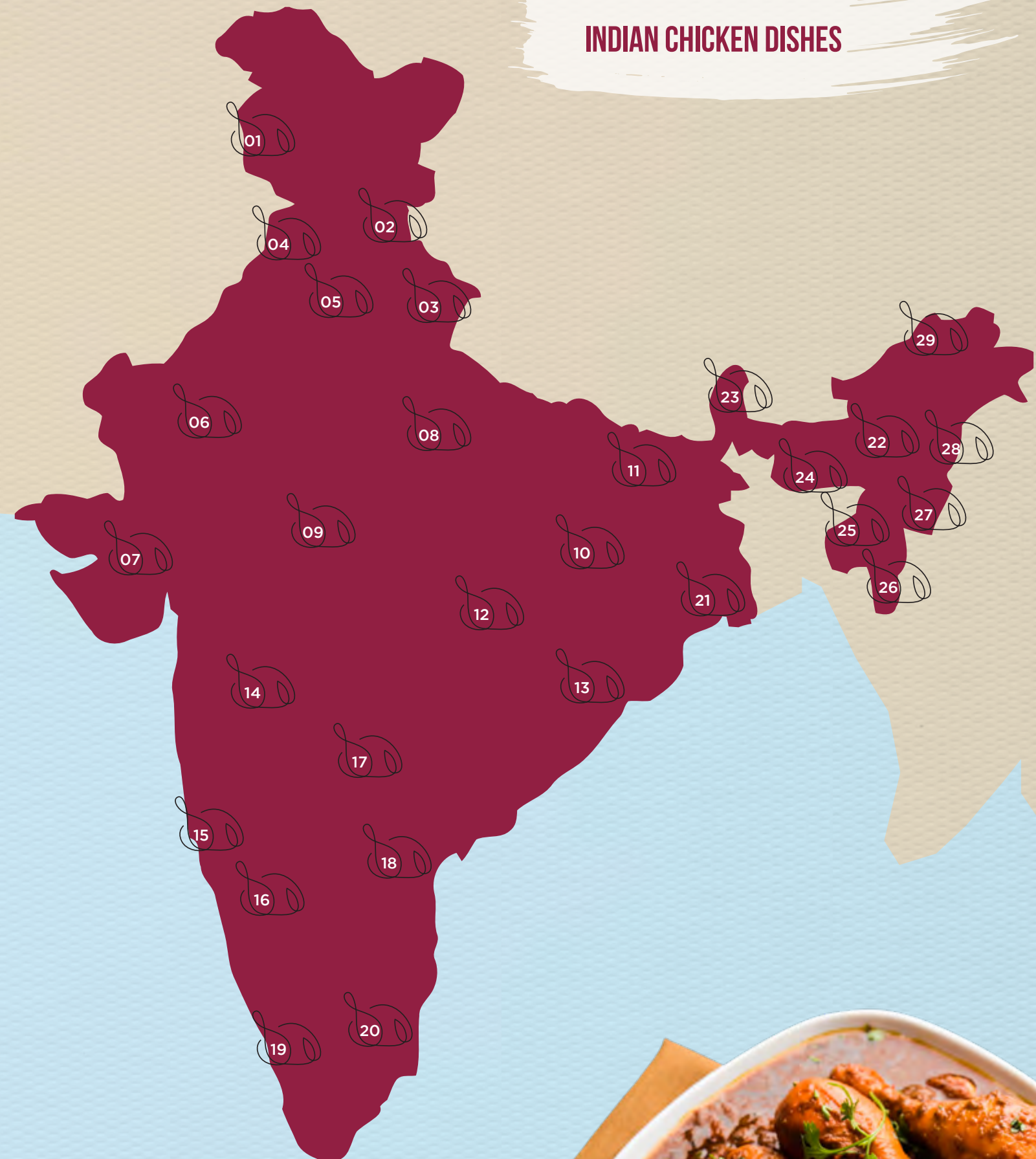
Traversing boundaries of geography, culture and socio-economic backgrounds, chicken, once scorned, has seen a phenomenal rise to becoming an undisputed favourite on India's plate in recent years. Quick to cook, unassuming to the taste, pleasant in texture, it's adaptability to flavour has made it a favourite meat to interpret into regional and global flavours on restaurant menus.

And therefore, the Dining Out section of this Collector's Edition focuses on Chicken. Begin with **Mapping Indian Chicken Dishes**, explore traditional chicken offerings from around the country (a representative look only, the sheer range of chicken offerings in Indian cuisine could be impossible to put on one page!) Then turn the pages to **Look Back** and examine the rise of chicken and its adaptation into mainstream cuisines. **Look Forward** to chicken's undisputed status as a preferred source of protein across home and commercial kitchens as well as dining formats and menus. And finally, browse through our expert panel's **predictions on dining out trends in 2022!**

- | | |
|--------------------------------|-----------------------------|
| 1. Kokur Yakhni | 14. Gavthi Kombdi Rassa |
| 2. Cha (Chach) Chicken | 15. Chicken Shagoti/ Xacuti |
| 3. Murgi ka Jhol | 16. Koli Saaru |
| 4. Tari Wala Kukkad | 17. Ankapur Kodi Kura |
| 5. Saagwala Kukkad | 18. Andhra Kodi Kura |
| 6. Khad Ka Murgh | 19. Nadan Kozhi Curry |
| 7. Murgha nu Shaak | 20. Pallipalayam Chicken |
| 8. Bharwan Chicken Pasanda | 21. Murgir Posto |
| 9. Kadaknath Chicken Curry | 22. Kukurar Jhol |
| 10. Khada Masala Chicken curry | 23. Kukhura ko Masu |
| 11. Rassedar Jhor Murgha | 24. Chicken Neijong |
| 12. Chhattisgarhi Kukad Saag | 25. Tohan Mosdeng |
| 13. Chicken Kasha | 26. Arsa Beipenek |
| | 27. Yen Thongba |
| | 28. Amrusu |
| | 29. Chimp Achin |



INDIAN CHICKEN DISHES



Disclaimer - This map of Chicken dishes from around India is a creative visualisation and is in no way a definitive guide to chicken dishes in India.

THE RISE OF CHICKEN - LOOKING BACK

PERVASIVE AS IT IS TODAY, CHICKEN WAS NOT ALWAYS PART OF THE MAINSTREAM INDIAN DIET, DESPITE BEING AVAILABLE SINCE 2000 BC. SO HOW DID IT RISE ABOVE ITS STATUS AS AN UNCLEAN FOWL, TO BECOME SUCH A FAVOURED MEAT?

EARLY CONSUMPTION IN INDIA

Throughout India’s history, a number of peoples including the Mauryans, Guptas, Turks, Mughals, European colonists and more have come to trade, invade, settle, and seek refuge. Each stirred their influence into the culinary melting pot that is Indian cuisine, inadvertently playing a part in the evolution of chicken consumption.

In his book, Indian Food Tradition - A Historical Companion, K.T. Achaya records that the Indian wild fowl is native to a region stretching from Kashmir to Cambodia. “It has been suggested that this bird was originally domesticated not as a source of meat or eggs, but to increase its availability for purposes of divination.” Over time, chicken came to be bred

for eggs and cock fighting, but its consumption existed largely on the fringes, with only the birds that were no longer useful culled for meat. “The earliest record of chicken consumption here dates to prehistoric times. We have found some archaeological evidence of chicken consumption during the Harappan period,” shares Food Historian, Dr. Mohsina Mukadam.

CHICKEN AT THE MUGHAL TABLE

Through the ages, chicken consumption in India was extremely localised. It was barely present in the cuisines of the North, where game and mutton were favoured. “We had Pachin (game birds) on our traditional plates in Kashmir but chicken was not a part of our diet,” shares Nalini Sadhu, Director of Matamaal Kashmiri restaurant. Culinary chronicler and Chef Sadaf Hussain adds, “being a lighter protein to digest, chicken was equated more

with vegetables than meat, and therefore considered food for the unwell across most of North and Central India.”

In Delhi and Punjab, chicken consumption increased over time, thanks partly to the Mughals, one of many dynasties to have ruled the North. Over their 500 years long rule, Mughal cuisine evolved from rustic warrior food to the epitome of fine dining. Being prolific chroniclers, rich texts,

including cookbooks of the time record their culinary practices. “Although lamb was the more popular meat, chicken was on the Dastarkhwan of the Sultan of Delhi and continued to be so on the Mughal tables. Murgh ka Shorba, Murgh Mussamman and Musallam, are mentioned in texts of the time,” shares food historian Salma Hussain. At the same time, the common man also enjoyed dishes like Murgh Kebabs in Chandni Chowk, another legacy of the Mughal rule.

LOCALISED BREEDS OF CHICKEN

Madhya Pradesh was one region where a local breed flourished. Unsurprising, as it was part of the erstwhile Mauryan empire where poultry farming began in India. Its claim to chicken fame is the Kadaknath, locally called Kali Masi or “fowl having black flesh”, with its meat, bones, organs and eggs being black. Traditionally bred by tribal and rural communities of the Jhabua region, it is one of just three species of black chicken in the world.

Chicken bones found at archaeological sites in Lothal, a historical port city on the West

coast of India indicate the birds were present in the region, but seafood and other meats were preferred. Even today, all along the western and southern coast, there is a prevalence of wild fowl and desi breeds, the latter referred to as Gaavthi Kombdi in Maharashtra, Naati Koli in Karnataka and Tamil Nadu, Nadan Kozhi in Kerala and Nattu Kozhi in Andhra Pradesh and Telangana.

Traditional menus of the Northwest have some chicken dishes. In Rajasthan, chicken was available but meat-eating communities preferred mutton,

game meat and fowl until hunting became illegal. Khad ka Murgh and Bhuna Kukkad are two dishes that evolved here early on. In largely vegetarian Gujarat, chicken was added to the menu by meat-eating communities like the Parsis and Bohris. “Mutton was preferred but chicken was cooked into simple rustic gravy dishes like Chicken no Ras, or with vegetables to make options like Beans Ni Marghi and Kand Ni Marghi. Later, dishes like Salli Marghi and Zardalu Marghi came into being”, shares Parsi home chef Mahrukh Moghrelia who grew up in Navsari.

AN UNCLEAN REPUTATION

Through the ages, chicken has been considered taboo. “Gram kukud (chicken) and Gram varaha (pork) were names given to meats proscribed by Manu in the Manusmriti,” shares Dr Mukadam. A big reason for this, she explains, was that free-range chickens were considered scavenging birds and therefore prohibited to upper caste communities. “Even among communities that reared these chickens, preference was always given to mutton, which was costlier and a status symbol.”

Even after it entered upper caste Maharashtrian kitchens in the 1970s, older generations shunned it. “Both my grandmothers scorned it. They looked at it as a dirty little bird!” shares

Kunal Vijayakar, food writer and broadcaster who belongs to the Pathare Prabhu community of Mumbai, famed for its love of non-vegetarian food. “Chicken was never cooked in our house. We questioned why it should be on the plate when there were better, more expensive options like mutton and fish to savour!” exclaims Vijayakar.

Food Historian, Chef Shri Bala, weighs in from South India. “A wild breed is mentioned in Sangam poems and referred to as Kuppai Kozhi, which means rubbish chicken.” It was largely avoided, save for specific regions. “Present-day Rayalaseema in Andhra and Ramanathapuram in Tamil Nadu – arid regions known as Palai in Sangam poems – had

sparse agriculture. Here wild chickens were an important food source,” she concludes.

Till about a 50 years ago, in Bengali Hindu households, whether in West Bengal or the erstwhile East Bengal (now Bangladesh), while all kinds of game fowl, wild jungle fowl (ban murgi), water fowl, duck and duck eggs were commonly eaten, domesticated chicken, which was all free range in those days, was taboo. “The reasons for this could have stemmed from them being bred by Muslim poultry farmers. Even in so-called progressive households, cooking chicken or even boiling an egg had to be done outside the house, in specially designated vessels,” shares Food Historian Pritha Sen.



BRITISH CATALYSATION OF CHICKEN

Chicken was on the British plate long before their arrival in India. And as a new Anglo Indian cuisine began to evolve, the British added many chicken dishes to the Indian repertoire. Cookbooks and accounts of the time are full of references to dishes like Dak Bungalow Chicken.

Through the two centuries of their rule, many cultural transformations were catalysed including poultry breeding to supply the growing need of the

many emerging public dining spaces like railway canteens and colonial clubs. Railway Chicken Curry, Grandma’s Country Captain, and old school Roast Chicken are legacies of this era.

This was the beginning of chicken’s change in fortune on the Indian plate.



THE RISE OF CHICKEN - LOOKING FORWARD

IN INDIA, POULTRY WAS HISTORICALLY AN UNORGANISED SECTOR. BUT IN THE 20TH CENTURY, THERE WAS A MARKED SHIFT; CHICKEN BECAME WIDELY ACCESSIBLE AND INCREDIBLY POPULAR ACROSS THE COUNTRY BOTH IN RESTAURANTS AND AT HOME.

CHICKEN IN EARLY DINING OUT CULTURE

By the time the British left India, chicken was well established on dining out menus. Younger Indians were embracing western culinary offerings and shedding taboos. And chicken was becoming increasingly popular – even aspirational!

Across erstwhile strongholds the British left behind their legacy in the form of clubs and restaurants that served ‘Continental cuisine’, born of the fusion of European and Indian influences. In Delhi, Lutyens became the hub of fine dining; restaurants previously patronised by the British were now frequented by elite Indians. In Mumbai, the equivalent was Churchgate Street. “I started eating chicken when we ate out at Continental restaurants. Chicken a la Kiev, Coq au Vin... I loved the way the French cooked chicken,” reminisces Kunal Vijayakar, food writer and broadcaster.

In Madras, a large existing Anglo-Indian population took over key positions vacated by the British, including those of cooks at clubs and restaurants, where Anglo-Indian classics like

Madras Chicken Curry, Ceylon Curry, and Chicken ‘Quoorma’ became prevalent. In Kolkata, British establishments were also frequented by a select local elite – the Brown Sahibs – who had adopted European cuisine. “Chicken then was more expensive than mutton or beef and hence had to be on gourmet menus,” shares food historian Pritha Sen. “Dishes like classic Roast Fowl, pates, Chicken a la Kiev, steaks, stews and soups were representative of high dining.”

Across India, a segment of economical food establishments also emerged to cater to the new working populations. In the North, the Partition of India brought Punjabi refugees from Pakistan. Most notable among them was Kundan Lal Gujral of Moti Mahal in Daryaganj, Delhi who gave India two of its most iconic dishes: Tandoori Chicken and Butter chicken. In Mumbai, communal Khanavals that served Maharashtrian fare like Ghashi and Kombdi Wade saw their clientele expand. In Kolkata, legendary cabins, eating houses inspired by Parisian

cafes, became hugely popular with the middle class for whom Park Street was expensive. “Enterprising owners used chicken to create tasty, highly affordable dishes like Kobiraji cutlets, Braised and Crumbed Cutlets, Mughlai Parathas, Chicken Korma, Chicken Afghani and later other Oriental dishes borrowed heavily from European Muslim and Chinese cuisines,” observes Sen.

While the oldest Chinese restaurants in India date back to the 1920s, fresh waves of migrations in the ‘50s and ‘60s led to the growth in popularity of Indian Chinese cuisine in Kolkata and Bombay. “Chinese restaurants mushroomed in Kolkata with a lot of chicken on their menus that people loved,” shares Sen. By the ‘90s, Chinese restaurant were trendy, but their original Cantonese menus had been replaced by the new ‘Indian Chinese cuisine,’ which was basically deep-fried vegetables or meat tossed in spiced up cornstarch-thickened gravies. A format that neutral chicken meat took to very well.

THE RISE OF CHICKEN

The mid 20th century brought a paradigm shift. “Broiler chicken was introduced between the late ‘60s and early ‘70s, with government initiatives promoting it as cheaper than mutton, possibly with an eye on nutrition and livelihoods,” shares Sen. Bred

specifically for consumption, with more succulent meat, it made chicken more accessible, quicker and versatile to cook, and tastier. Its popularity spread like wildfire. So much so, that by the 70s the Robibar er Mangshor Jholl, the Bengali staple Sunday Mutton

Curry had been replaced by a Murghir or chicken version. The same happened in Maharashtra and other regions as well as it became an item of regular consumption rather than occasional indulgence.

PROLIFERATION AND EVOLUTION OF CHICKEN IN THE HOME KITCHEN

Over the next 2-3 decades, the poultry sector became organised. By the beginning of the 21st century, many brands entered the market. Most interestingly, however, the pandemic drove extraordinary acceleration in chicken consumption, thanks to the linkages between protein and immunity-boosting.

Home cooking also came into focus and people began to learn and experiment in the kitchen. Aniket Prashant Bhawe, a sales professional in Mumbai, took to cooking when ordering became impossible. “I was bored with ready-to-eat options and missed good curries, so I started cooking at home. I taught myself everything from scratch, including cooking meat for the first time. Chicken is an easy meat to play with, offering endless possibilities, from chicken tenders, pakodas, strips and nuggets to tikkas, full roasts and

curries,” he shares. Chef Rakhee Vaswani of Palate Culinary Studio concurs, sharing that many of her workshop participants requested restaurant-style chicken recipes. “Probably because its meat is white, has no distinct smell, and allows for simple recipes, like chicken nuggets for newly minted non-vegetarians. Chicken is the go-to meat for everything from butter chicken to Asian recipes.”

The industry also pivoted to cater to changing consumer demands. Players like Godrej and Zorabian were already present but e-commerce brands like Meatigo, Licious and more entered the market early, bringing hygienic, convenient solutions to the doorstep. Roxanne Bamboat, food and travel blogger, opines, “Chicken is now widely and easily available and more economical for a regular meal. It comes exceptionally well cleaned and

packed. You get various cuts and options like skinless, boneless and even frozen and it’s easy to handle and cook in comparison to mutton.” Brands like Venky’s, Yummiez and Prasuma saw ready-to-cook and eat solutions fly off the shelves. Kashmiri Nath, Assamese culinary chronicler and founder of Kata foods, a brand of ready-to-cook chicken products, observes, “people have this notion that frozen chicken is unhealthy. But when you see a dead bird hanging by the roadside – you realise how unhygienic it is. I believe that frozen chicken is healthier, with birds blast chilled immediately once slaughtered.” Today consumer demand for clean, untouched, hygienically packed chicken is at an all-time high.

CHICKEN ON THE DINING OUT MENU

The same reasons that make it popular in home cooking also make chicken a preferred choice on dining out occasions. As Vijayakar observes, “chicken is an easier starter meat than mutton with bones and marrow or a steak.” Consequently, today not only does every meat-centric restaurant have chicken dishes in their repertoire, but also chicken alternatives to mutton offerings. “We received a lot of demand for chicken and recently introduced

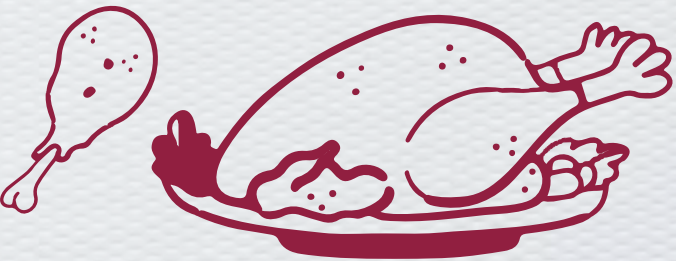
a special Kokur or Chicken Thali featuring classics like Chicken Yakhni and Waza chicken but also a Chicken reinterpretations of classic Kashmiri mutton dishes like Rogan Josh, Korma and Kebabs,” shares Nalini Sadhu Director Matamaal Kashmiri Restaurant.

Chef Vikas Seth, Chef and Culinary Director of Embassy Leisure, weighs in from years of observing consumer behaviour.

“There is an increased leaning towards red meat/ goat because Bangalore is a meat-loving city and people are experimenting with different kinds of protein but poultry is still number one.” Culinary Chronicler and Chef Sadaf Hussain sums up succinctly, “chicken, like paneer or potato, has little flavour of its own. It’s actually the gravy, marinades or masalas that chicken is cooked in, that are savoured.”

WAY FORWARD

Loved by all demographics, easy to cook, a neutral canvas for any cuisine profile, chicken has come to play the role of leveller for the non-vegetarian section of the menu, and will only grow in popularity over time.

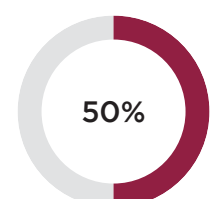




CUISINES IN FOCUS

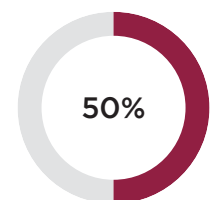


MENU INSPIRATIONS



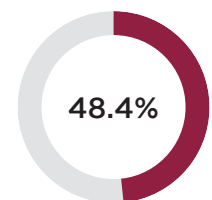
50%

Korean cuisine



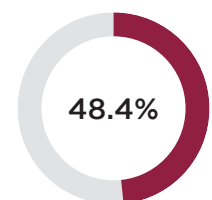
50%

Mountain cuisines of India



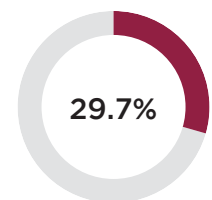
48.4%

Deeper exploration of micro cuisines of North East India



48.4%

Japanese casual dining



29.7%

Micro cuisines of South East Asia

Each year specific cuisines rise and fall in popularity. The heightened curiosity and a deep interest in food and culture exploration of last year has deepened to a conscious exploration with mindfulness. Our panel observes that people continue to compensate for lost travel opportunities with food exploration be it in India or the world.

That said, our experts also see a definite inclination towards eating for wellness with the cuisines diners will indulge in in 2022. The desire to indulge sensibly

is apparent with **Korean cuisine** and **mountain cuisines of India** getting equal space. All the cuisine profiles that made it to the top five are high in protein, but well balanced by plant and fermented foods while ticking the checkboxes on spicy but uncomplicated ingredient-forward flavours. Our expert panel is also excited to report that the newfound sense of pride we saw in our culinary culture last year, will continue to manifest in deeper exploration, especially of the **micro cuisines of North East India**.

Antoine Lewis



Thanks to the influence of K-pop, Korean dramas, Korean TV shows and movies on Netflix, Korea is shaping up into a cultural powerhouse.

Mountain cuisines are healthy and use a number of immunity boosting ingredients. And with travel having been eased after the lockdown a lot of people choose to spend their Work From Home months in the mountains. Himachal, Ladakh, Assam, Shillong, Odisha were among the places people set up base, developing an interest in these cultures and cuisines.



Rachit Kirteeman

Chef Vikas Seth



As international travel has been minimal due to the pandemic, the North East of India has become a go-to destination and therefore their food has been highlighted quite a bit in the last couple of years and is bound to create intrigue in the coming years as well.

The menu of a restaurant is its identity. And the industry invests a lot of energy and resources on their menus. With the pandemic continuing to cause havoc, the ante has been upped. Diners continue to be selective about when and where they will dine out. While restaurants must also be cognisant of leaner supply chains and tighter teams, to optimise resources, the post pandemic diner clearly has wellness for the individual and the environment on top of their list. With food for wellness being in focus, and

diners realising solutions to eating for health and immunity are already present in our traditional cuisines, our panel of experts anticipates more concise menus, largely inspired by culinary heritage/home-style/grandmothers cooking. This keener mindfulness towards fitness also manifests in a demand for health and immunity boosting ingredient-forward menus, rich in protein from clean meats, and specifically curated to be plant-forward, to address consumer concern for the environment.

Chefs have started incorporating the mindful things that we already practice at home, like using seasonal, nutritional and traditional ingredients and techniques, into their menus, but with a nouveau twist. We have realised that eating healthy is not just a fad but a requirement - it's the only way to build our body's strength. So menus are going to be more rooted in reality, rethinking how we work with ingredients, and dishes we love so that they are healthier. We will see the use of traditional ingredients in new and creative ways. For example, millets in different formats, fresher ingredients like tender coconut and fruits in trendy, interesting avatars like smoothie bowls or winter special dishes like a sarson ka saag, turned into a mustard greens and barley salad.

Roxanne Bamboat

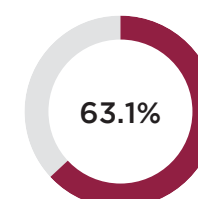


The pandemic has given rise to a tremendous shift towards familiar food that people have either grown up eating or relate to as home food. Even when dining out, people are done with pizza and pasta; they're happy to look for the same comfort and healthiness of home food from a menu that's inspired by culinary heritage or someone's grandmother's kitchen.

Our kitchen and cafe's USP is that we don't repeat menus. And that we have no defined cuisine. Yet we draw inspiration from cuisines that customers can't get enough of. Ramen style bowls, Omu Rice Bowls, Katsu Sandwiches, Banh mi Sandwiches, Pho, Bun-Cha, Mee - Goreng and dishes like these are always the highest performing menus.

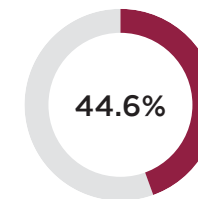


Chef Auroni Mookerjee



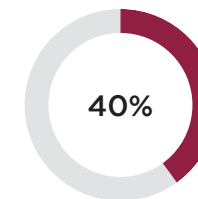
63.1%

Menus inspired by culinary heritage/home-style/grandmothers cooking



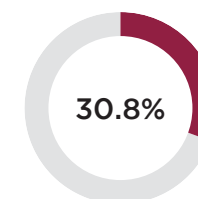
44.6%

Health/Immunity boosting, ingredient-forward menus



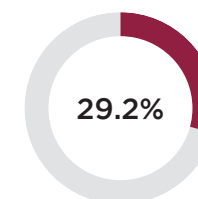
40%

Plant forward menus



30.8%

Cuisine-agnostic, theme-based, concise menus

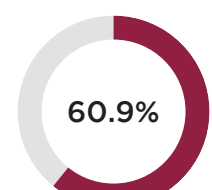


29.2%

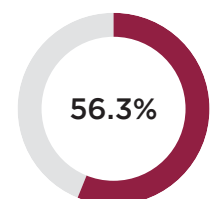
Shorter frequently changing menus with limited offerings



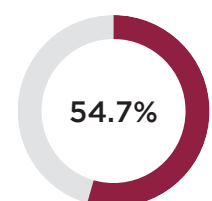
RESTAURANT CONCEPTS



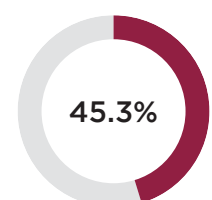
Cuisine agnostic, chef-owned/led delivery restaurants



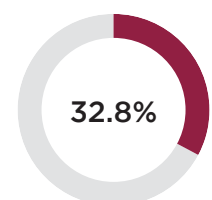
Regional cuisine-based concepts



Farm to table restaurant concepts



Rise of the travelling restaurant (legacy restaurants popping up in other cities)



Naked kitchen/food theatre-based concepts (ie. kitchen in full public view for transparency)

The pandemic has wrought a paradigm shift in India's restaurant industry. 2022, is going to bring a lot of surprises, global brands are focusing on India while the industry is spinning out some truly bold, fresh and fundamentally intentional ideas. Our panel of experts is anticipating a growth in cuisine agnostic **chef-led businesses**, where the person behind the food will draw diners to them for their culinary philosophies, with so many chefs having utilised the pandemic period to

deep dive into food studies and invest in finding their focus. The new-found pride in culinary identity and need for novelty will also drive diners to look for variety by seeking out **regional cuisine-based concepts**, that deliver on the wealth of nutrition and flavour our traditional culinary heritage holds. Diners will also gravitate towards **farm to table concepts** that support their growing desire to eat fresh, local and seasonal produce and support local farmers and food producers

AD Singh



I continue to be very excited about Regional cuisine-based concepts for 2022. In India the sheer diversity of our cuisines is staggering, and it's hard to comprehend how we have so many delicious and yet distinct offerings in one country! There are already some very popular restaurants in this genre like The Bombay Canteen or Only Fish or our own SodaBottleOpenerWala, but there is still a long way to go. With the worst of the pandemic seeming to be over I expect the industry to explode and some of the most exciting parts of that will be cool concepts around our range of regional cuisines.

I firmly believe that 'farm to fork' is evergreen and here to stay. I also see a movement converting seabeds into sea farms with microalgae proteins, seaweeds, furikake, sea cucumber, seagrapes and the likes making a grand entry



Chef Varun Inamdar

Aslam Gafoor



I believe restaurants will become increasingly experiential. Driven by the pandemic, there is an uptick of people taking day trips to restaurants dotting the outskirts of the city and this will only gain momentum. People will be willing to go that extra mile to enjoy intimate dining experiences. A big part of this will also be chef-driven, where the food philosophy of the chef will shine on the menu and the overall experience, including the use of mindfully sourced hyperlocal ingredients, seasonal vegetables and root-to-tip recipes.



FOOD CATEGORIES IN RESTAURANTS

The pandemic distanced us from many luxuries that we took for granted before, exposing the fault lines in the industry's food systems. Origin and provenance, health and personal belief systems have all become more important to diners, chefs and restaurateurs today. A segment that saw accelerated growth in this time was that of **locally made artisanal foods**, consumer appreciation of this is evidenced by almost three-fourth of our panel seeing it as a category in focus for restaurants to support local

food producers. Our panel also observes a consumer demand for **lifestyle driven alternatives**, pointing to a marked shift in the way consumers exercise their choice with a keen focus on sustainability. With chefs and restaurateurs taking advantage of the slow period in 2021 to introspect, delve into local exploration and rediscover their home kitchens, the panel is excited to see a surge of conversations around **nostalgia foods/dishes being reinvented by chefs**.

I think the trend of comfort classics with a Chef's gourmet, artisanal spin, is going to be big in 2022. People are looking for comfort classics like burgers. And not just at fast food, but in gourmet, artisanal, hyper local, and even healthy formats. At Speak Burger, these are things we can be creative with. We make a lot of elements in-house, including the bread, ketchup, and kettle chips, our own black garlic, fermented chillies for our hot sauce and use regional spices from various parts of India as flavour enhancers. I can even play with the health aspect of something as indulgent as a burger, using gluten free, multigrain flours for my rolls, adding a lot of roughage and complex carbs through good salads and pickles and baking chips.



Chef Vicky Ratnani

Chef Regi Matthew

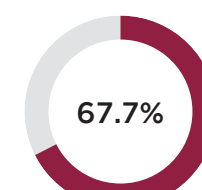


People have started understanding the nutritive and therapeutic values of our ethnic food. So recreating the traditional dishes to suit new and novel formats will have a good future.

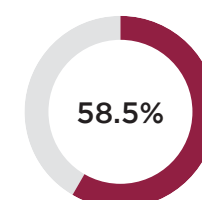
The pandemic is seeing a lot of people turn towards better eating and nutrition. The benefits of the right amount of proteins in a diet are being widely discussed. This also holds true for vegetarians and vegans, who are seeking more options for their protein intake. To meet this need, a lot of local meat-alternatives brands are launching in India, and their products are finding their way onto menus across the industry. The rate at which this segment is developing, it seems India could become one of the largest markets for meat alternatives by 2025.



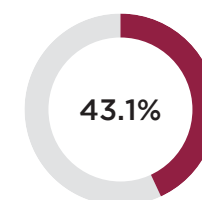
Chef Ajeet Anant Kalbag



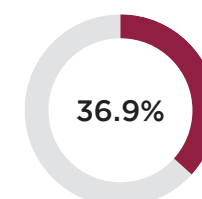
Locally made artisanal foods (eg. breads, cheese, pickles, ferments, etc.)



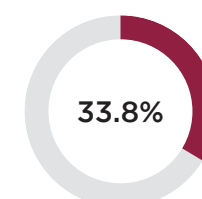
Lifestyle-driven alternatives (eg. vegan cheese, faux meat, plant-based dairy alternatives, etc.)



Nostalgia foods/dishes reinvented by chefs



Increased use of single-origin and GI tagged ingredients (eg. heritage rice, provenance based ingredients, etc.)



Health/immunity boosting functional foods (eg. moringa, turmeric, amla, etc.)

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PRODUCTS

Ghar ka Fast Food

BEVERAGES

EVOLUTION OF COFFEE

Once an accessory to food on restaurant menus, the beverage space of India is today a vibrant sector of immense growth and evolution. Conversations around beverages have always been exciting, from Indian wine claiming its space on global platforms, to the craft beer revolution, from the growth of non-alcoholic beverages to the rise of Indian spirits. The Indian beverage space was most hard-hit within F&B in the last two years but it has also rapidly reinvented and transformed to adapt to the changing landscape. One area that has seen phenomenal growth is that of Indian Coffee.

With this in mind, the Beverage section of this Collector's Edition explores the **Renaissance of Indian Coffee**. Begin with perusing a **timeline of the evolution of coffee culture in India** - a rich and complex journey, captured via significant milestones. Then, dive a little deeper. **Look Back** at India's history of coffee cultivation and consumption, the birth of cafe culture and the critical turning point it wrought. **Look Forward** to the rapid and explosive evolution being driven by both Indian coffee makers and consumers. And finally, see what our experts forecast in the world of **beverages for 2022!**



- 1st Wave of Coffee in India: Coffee As a Commodity
- 2nd Wave: Coffee as an Experience
- 3rd Wave: Appreciating origin & skill
- 4th Wave: Experimental Processing

Disclaimer - This timeline is a creative visualisation of significant moments in India's coffee evolution and is in no way comprehensive or definitive to encompass the complexity of this industry in India.



THE RISE OF INDIAN COFFEE: LOOKING BACK

INDIA HAS GROWN COFFEE FOR CENTURIES; SIGNIFICANTLY PRE-DATING THE MORE POPULAR TEA IN TERMS OF CULTIVATION AND CONSUMPTION. BUT WHAT CAUSED THE EXPLOSIVE GROWTH OF OUR COFFEE CULTURE, WHERE TODAY WE SEE A NEW COFFEE BUSINESS OPEN UP EVERY DAY?

THE FIRST BEANS ARE SOWN

Coffee cultivation in India dates back to the 1600s. According to legend, Sufi saint Baba Budan propagated seven beans smuggled from Yemen in southern India. First grown as a garden shrub, coffee was initially cultivated as a commercial crop in India in the 18th Century under the aegis of the British Empire, exclusively as an export commodity.

Much like tea, Indian consumption of coffee also began courtesy the British. First catching the fancy of the elite, who could afford and access such luxuries that were a privilege of the Raj, coffee then proliferated beyond Brahmin homes in Mysore and Madras, as increasing numbers of people took to the bittersweet beverage. With its popularity growing,

coffee houses came into fashion, but Colonial establishments denied access to Indians. The Coffee Cess Committee, a government body, introduced Indian Coffee Houses sometime in the 1930s. These went on to become a national institution.

THE FIRST WAVE - AN ERA OF COMMODITY COFFEE

“In the 1940s, came the Coffee Board”, shares Sunalini Menon, founder of CoffeeLab and Asia’s first woman to be a professional coffee taster. The aftermath of World War II affected coffee trade adversely. The Coffee Cess Committee evolved into the Coffee Board of India, with an objective to develop India’s cultivation, trade and drive interest in the sector. During this era, coffee held the status of cash crop or commodity, which

we today recognise as the First Wave of India’s coffee culture. By the 1970s, the Board had set up its Quality Control department, where Menon began her career. “The very fact that the Board decided to have a Quality department as early as 1971, showed that we were going to be quite progressive,” she points out. Elaborating that, until then, the prevailing practice of the Board had been to set prices

based partly on the quality of the cup and visual quality of the bean, but largely on quantity. As a result, farmers focused on quantity over quality, since their yield would be consolidated with that of others anyway. “With the establishment of the Quality department, we started developing our tasting and cupping standards. This was the first step in India’s journey to producing quality coffee,” concludes Menon.

THE SECOND WAVE - THE EMERGENCE OF CAFÉ CULTURE

In 1996, the Coffee Board went on to liberalise trading of coffee, allowing growers to trade in an open market. Menon lauds this movement for pushing the importance of quality in a competitive market. “Around this time, we also realised that export wasn’t everything, that we should also look at the domestic market,” she adds. This catalysed the launch of Café Coffee Day (CCD) with the opening of its first cafe outlet in Bengaluru that same year.

CCD boldly spearheaded espresso-based coffees in a traditionally filter coffee consuming market. “Educating the consumer to understand the value of this offering, and the resultant price difference, was a huge task,” admits Menon.

But clearly, the brand’s founder, the late V G Siddhartha Hedge, was onto something, because CCD outlets quickly grew into the country’s favourite hangout spots, with the chain expanding rapidly across the country. Over the next few years, the cafe space saw the launch of the Barista chain, the entry of the UK-based Costa Coffee, followed by a host of international brands that recognized the potential in this market.

As India’s café culture grew, coffee itself evolved from a commodity into an experience. “I was exposed to filter coffee from a fairly young age,” recalls Ashish D’Abreo, co-founder of the Flying Squirrel and Maverick & Farmer coffee brands. “Then, the first Café Coffee Day opened close

to my college, so all our evening catch-ups and dates would be at CCD.” Coffee became a social event and a personal indulgence, spiked with caramel or chocolate sauce and topped with whipped cream if one so wished. This was a turning point. India entered the Second Wave of India’s coffee culture.

“When I started my journey, we had no cafes!” Menon admits, admiring the exponential growth this space has seen since then. Like her, most players in this business salute CCD for paving the way for this industry, which is growing in leaps and bounds today with new coffee enterprises launching every day! From here on in, Indian coffee culture evolved rapidly within the next decade.

COFFEE BECOMES A STATEMENT

In 1963, Nestlé launched Nescafe, their instant coffee brand, in India, aggressively advertising convenience as its USP. While this increased consumer adoption somewhat outside south India, tea remained the preferred hot beverage in homes, while coffee attained a novelty status at special occasions. “In central and north India, coffee was primarily introduced at weddings, as a hot frothy beverage made with instant coffee,” reminisces Geetu Mohnani, a Bangalore-based barista trainer and coffee consultant.

The expansion of cafe culture in these parts of the country strengthened coffee’s status as a lifestyle drink. When Starbucks opened the doors to their first outlet in Delhi in 2012, queues of aspirational young Indians lined up to get takeaway cuppas with their names scribbled on. “Social media played a big role,” shares Mohnani, who began her career at Starbucks. “Being seen at cafés or with a Starbucks carry away cup was a style statement.” People began virtually ‘checking in’ at cafés with friends and posting pictures of latte art on social media platforms.

Around this time, during the early 2010s the adoption of higher-end gourmet coffee, be it a Starbucks latte or a well-brewed pour-over was much more rapid outside the southern states. “There was suddenly a blossoming of coffee culture in totally unexpected places, like Surat, Jaipur, and Chandigarh,” observes Arshiya Bose, founder of Black Baza Coffee Company. She deduces that this was probably because there was no legacy of traditional coffee consumption that needed to be unlearned.

Tapaswini Purnesh, owner and fifth-generation coffee planter at Harley Estates concurs. Having launched their specialty brand Classic Coffee in 2008, and a micro-roastery, Berries and Barrels, in Bangalore in 2010

Purnesh has observed consumer behaviour evolve. “It was a hard-sell, even with South Indians, who were already accustomed coffee drinkers. The cost of production was much higher, because of the specialty coffee processes. The market just wasn’t ready then.” And then a few years later she began seeing a shift. “People started travelling more, on leisure and for work. Those who went abroad were coming back to India with a taste of specialty coffee. People started understanding coffee better, and were getting interested.”

It was this period – between 2012 and 2015 – that India began seeing a nationwide shift in the market, viewed as India’s Third Wave of coffee.



THE RISE OF COFFEE IN INDIA: PRESENT & FUTURE

INDIA MAY HAVE TRAILED BEHIND THE GLOBAL CURVE OF COFFEE APPRECIATION. BUT ONCE INDIANS GOT A TASTE, THE SEGMENT SAW EXPLOSIVE GROWTH, RIPPING THROUGH THE SECOND AND THIRD WAVES IN BARELY TWO DECADES!

THE THIRD WAVE - THE RISE OF SPECIALITY COFFEE

The movement that is globally acknowledged as the Third Wave of coffee culture, evolved from a niche community of roasters and cafés in the USA in the 1980s. This movement focused on the coffee bean itself, and its origin, terroir, and how coffee professionals could apply their skills to draw out unique, complex flavours of individual coffee bean varieties. In India, this wave arrived between 2012 and 2015, when a handful of micro roasteries mushroomed and quickly gained popularity.

Among the first of these was Blue Tokai, a small-batch specialty coffee roastery founded by Matt Chitranjan and Namrata Asthana that launched as an online, retail-only company. “When we started, our customer base was Delhi, Bombay and Bangalore, where some people already understood what this coffee was, and there was pent up demand for it” shares Chitranjan. Almost parallelly, friends Ashish D’Abreo and Tej Thammaiah began Flying Squirrel Coffee, in Bangalore, which has today evolved into Maverick & Farmer. “When we began in 2012, the scene was pretty nascent. Coffee meant instant coffee,”

observes D’Abreo. “We’ve come a long way from that. Today people are actually gunning after certain notes, talking about the origin or process. They are able to pinpoint the flavour notes they are looking for from their coffee!”

A huge part of specialty coffee is the effort and human intervention that goes into each step of the process. It begins with the harvest of coffee cherries, with only the ripest ones being hand-picked each day. Growers then process the cherries through fermentation and drying, applying their knowledge of biochemistry to optimise the bean’s natural flavours. Then coffee tasters and roasters devise the best roast profiles to showcase these flavours. And finally the beans are ground and brewed by skilled baristas so that all of these steps shine in the final cup.

For example, where coffee was once just dark roasted, today a lot more attention is given to the roast profile. “When coffee is dark roasted, it’s going to lose its complete flavour, and will taste kind of burnt and smoky. In medium and light roasts, the sugars in the coffee beans are correctly caramelised to open up a wide range of flavour,” explains

Sumanth Paranjpe, Head Barista at Araku Coffee. Araku is a brand that prides itself on highlighting terroirs and micro-climates in their coffees, and educating their customers about its value.

Like Araku, most brands in this movement have put transparency and storytelling at the centre of their philosophy by bringing the estates, growers, roasters and baristas behind their coffee to the forefront. “A lot of effort goes into educating customers, but once they’re along on our journey, they stay,” says Chitranjan. Over the last decade, he has seen tremendous growth in demand for specialty coffee, even beyond the metro cities where Blue Tokai initially began. “Today, we even supply coffee to restaurants and cafés in tier two and three cities. They are willing to pay a premium because their consumers demand and appreciate quality.”

Where Indian coffee beans were once primarily exported, with better understanding and appreciation, the domestic demand has been growing consistently in recent years. Tapaswini Purnesh, owner of Harley Estate proudly echoes this. Historically, a majority of Harley Estate’s coffee was exported. But “in the 2020-21 crop, we did not export even a single bean. All of our specialty Arabica coffee was sold to buyers and roasters within India. It’s very exciting for us producers to see this shift!” she exclaims.



THE RISE IN HOME-BREWING

Today, the segment of discerning consumers is growing. They know what makes good coffee, and they know exactly what they like. D’Abreo shares an interesting insight he gained a few years ago, when Maverick & Farmer launched a sampler pack. “The idea was for people to taste the different varieties, and then buy what they like the most. But consumers kept coming back for this sampler pack.” The company discovered consumers were actually enjoying the variety the sampler pack offered. This is reflective of coffee aficionados today. Not only are they buying larger volumes, but their home pantry is often stocked with a selection of favourite coffees.

THE FOURTH WAVE

Each wave of evolution in coffee culture saw at least one step of backward integration. The first wave saw consumers focus only on the final product. The second wave brought baristas, and their skills with crafting beverages and elaborate latte artistry into the limelight. The third wave saw roasters taking agency. And now, the fourth wave presages producers at the farm level getting innovative with their offerings!

Producers today are playing with techniques like ageing unroasted beans in wine and whiskey barrels, cold-smoking green beans, fermenting coffee cherries with wild yeasts from

Interestingly the last few years has seen specialty coffee move into the home spaces in a big way. Many believe that the pandemic and resulting lockdown accelerated this. “What would otherwise have taken three to five years took just one year,” adds Suhas Dwarakanath, founder of Benki Brewing Tools. The Indian consumer did not want to compromise on their cup of coffee and actively sought to improve their home consumption habits. Mohnani who has seen online retail of coffee spike in the last two years concurs. “With additional time and disposable income, people tinkered with new hobbies.”

various fruits, or even strains of beer brewing yeasts! “I think this is it! I think this is the fourth wave of coffee,” exclaims D’Abreo whose company Maverick & Farmer is at the forefront of experimental coffee processing at the farm level. “Today, the way the Indian coffee market is evolving, knowing or asking about the origin (of your coffee) is a given. Now things are about experimentation and taking flavours to the next level!” All of this indicates that the coming years will see the specialty coffee experience becoming more complex.

Simultaneously, there is also an effort to offer simpler and more

Dwarkanath lauds this growth of home brewing. “It has benefited everyone in the industry,” he observes. “With cafés, there is a logistical limit to how many consumers you can serve. With the number of people brewing coffee at home, the consumer base has grown.” This movement is also pushing cafes and professional baristas to raise their benchmarks.

Today, Indian coffee consumers are more appreciative of the skills and effort that go into brewing a good cup and they expect cafés to deliver a beverage that is at par with or better than what they would brew at home.

convenience-driven solutions. There is some great innovation happening; capsule-based coffee machines will revolutionise the home coffee experience, most roasters are introducing easy-pour drip bags, consumers can pick from an ever-widening selection of gourmet instant coffees, and ready-to-drink cold brew options.

“We need to work on making coffee accessible to all kinds of consumers,” says Chitranjan about this dichotomous trend. “It’s always more exciting when you can have a greater impact.”

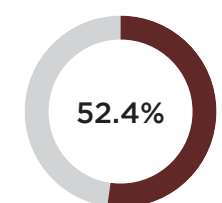




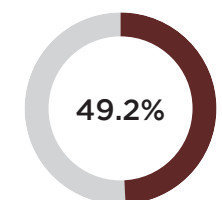
BEVERAGE TRENDS IN HOME KITCHENS



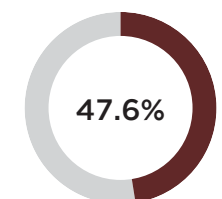
ALCOHOLIC BEVERAGES



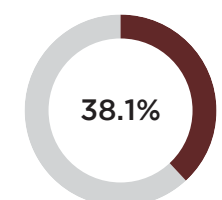
Gourmet Indian origin artisanal coffee/tea brands



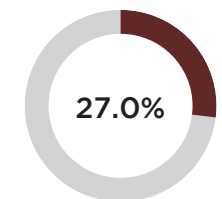
Mixers for home bartending



Homemade fermented drinks



Immunity & functional health boosting healthy beverages



Increased in-home alcohol beverage offerings

2021 saw the beverage industry rapidly pivot to create solutions that allowed consumers to bring beverages experiences into their homes. Consumers, too, with more time and disposable income on hand, invested in fostering hobbies around personal beverage preferences. Our panel foresees the in-home beverage space only seeing greater exploration in 2022. That India has woken up to coffee is clear with more than half the panel predicting

that **gourmet Indian origin artisanal coffee and tea** continue to grow. Social gatherings at home will foster interest in **mixers for home bartending**. And the F&B industry will continue to innovate in these areas, to acquire more of the in-home market share of the beverage space. The panel also foresees hobbyists dabbling more seriously in **homemade fermented drinks** showing that consumer fascination with ferments has not abated.

Karina Agarwal



The market for premixed/bottled cocktails will continue to grow in 2022. We'll also see a lot more flavoured and lo-cal mixers - waters, sodas, syrups to play with to switch up your typical drink. Non-alcoholic spirits & liqueurs - equivalents to Campari, Amaretto and the likes will gain more traction since they can be sold across marketplaces - offline and online, and allow home bartenders to create fancy cocktails.

The rise of roasteries, microlots and artisanal farm to cup coffee from Coorg to Chikmagalur and beyond shows the importance accorded to coffee these days. More and more people are investing in the equipment and turning to roasting, grinding and home brewing their own beans for the perfect cuppa.

Nikhil Merchant



Zero proof beverages and mixers with unique flavours are a positive movement in the beverage industry. With many brands focusing on creating boutique, handcrafted blends this is creating a mass appeal for people looking to up their beverage intake options.

Anurag Mallick & Priya Ganapathy



The reopening of pubs and bars has brought much needed relief to the industry and consumers alike. Consumers returned to savouring their poison of choice, almost with a vengeance! 2022 will see some seek the nostalgia of grabbing a cold one with friends. Our panel forecasts the new found appreciation of all things Indian will extend to alcoholic beverages. **Indian**

ingredient infused & flavoured alcoholic drinks will attract a lot of interest as will Indian made spirits. That the hobbyists who experimented with mixology at home will have higher expectations and newfound appreciation for the knowledge and skill held by beverage professionals is evident in the **rise of the celebrity bartender**.

Thanks to the pandemic, there was a focus on looking at what ingredients and recipes were available or possible in India, leading to experimentation with new flavours, but with an Indian edge. The next year is going to reinforce this trend, even within the alco-bev segment.



Savio Pereira

Shatbhi Basu

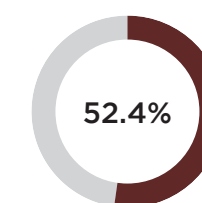


Quality Indian origin spirits will continue to grow. This is Renaissance time for our young entrepreneurs. They have passion and grit to make things happen.. And indigenous spirits are part of that renaissance too. We must revitalise quality Feni and bring Mahua to the world

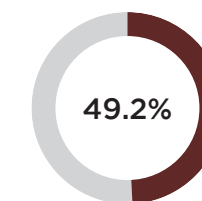
Celebrity bartenders lend their own unique personalities to the cocktails they create, through their style, the ingredients and flavours they lean towards. People travel long distances to eat at specific restaurants; I believe we'll also travel to drink at bars helmed by certain mixologists, as experiences worth planning for. Bar-takeovers featuring specific mixologists will also be an exciting phenomenon in 2022.



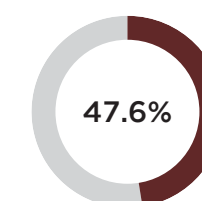
Anisha Rachel Oommen



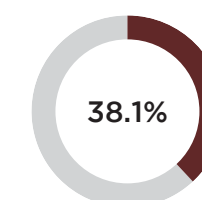
Indian ingredient infused & flavoured alcoholic drinks



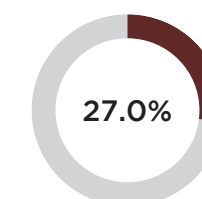
Rise of the celebrity bartender



Indian made spirits



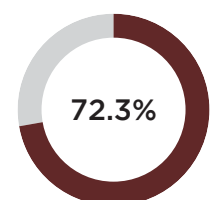
Low &/or zero-alcohol beverages



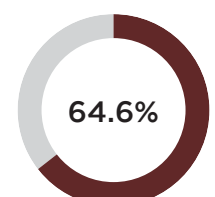
Indigenous spirit based cocktails



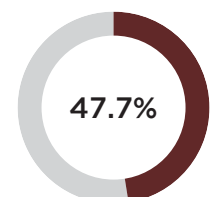
NON-ALCOHOLIC BEVERAGES



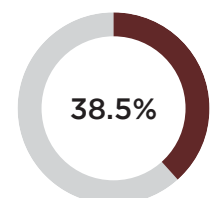
Gourmet Indian coffee



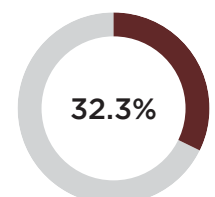
Fermented Beverages



Cold brew tea and coffee options



Immunity & functional health-boosting beverages



Plant-based Dairy Alternatives

In our largely teetotaling nation, the non-alcoholic beverage space has always been one of innovation. And it has seen even more evolution in the last two years as the F&B industry focused on grabbing a larger chunk of the in-home beverage space. Indian coffee producers pivoted beautifully to offer an ever expanding bouquet of offerings to the Indian coffee lover both at home and outside. The fruit

of this labour is apparent in more than three-fourth of our expert panel picking **Gourmet Indian coffee** as the top focus in 2022. **Fermented Beverages** continue to garner interest from consumers and our panel, and the uncomplicated nature of **cold brew tea and coffee options** continue to drive their upward curve at a robust pace.

Salloni Malkhani



Meeting up for a coffee is never going out of style. And with the wonderful artisanal coffees with their beans ground to our preference gives us a feeling of being taken care of. The search for the perfect coffee experience will not end. And 2022 will be seeing more of it.

Today, as more people enjoy black coffee we are seeing cold brew coffee grow in popularity. It's a great way for people to begin exploring coffee at home, because it is a brewing style that maximises the subtle flavours of a coffee, without the need for any complex brewing equipment or processes.



Rahul Sharma

Chef Shazia Khan



The beverage industry has taken steps towards adding a list of beverages that are immunity boosting with more healthy offerings. The focus will also be more on environment-friendly plant-based drinks. For example, potato milk will be a trendsetter along with other plant-based milk such as oat milk, soy milk, and almond milk.

Godrej
Jersey

**Nourish
the winner
in you**



DESSERTS

INDIAN MITHAI

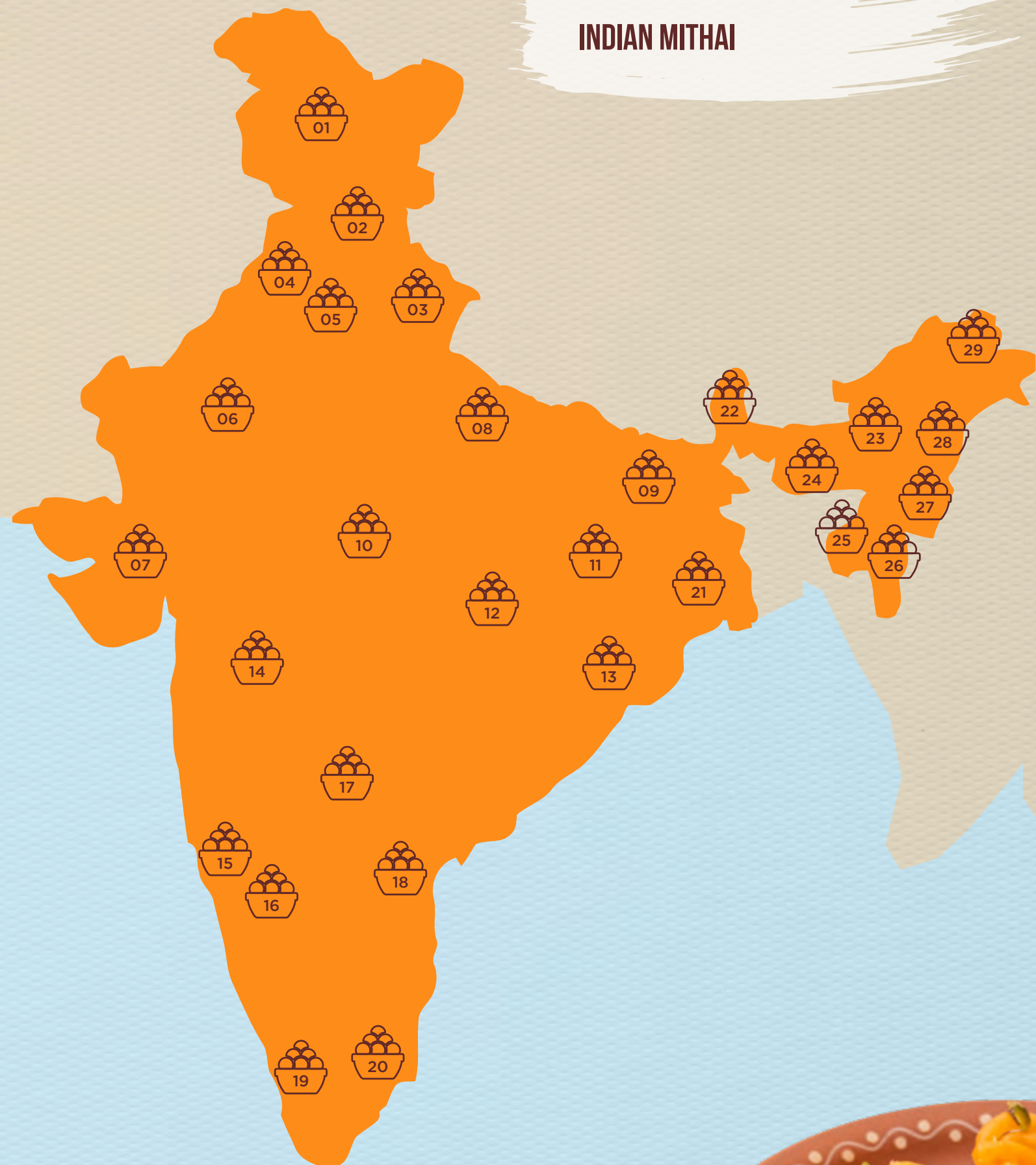
India loves its meetha. And this love has been highlighted in this survey, year on year! Health concerns may have motivated cautious consumption with consumers expressing a desire for portion-controlled and healthier options throughout, but the unique position sweet holds for India is incontestable! Conversations around traditional mithai started in 2019 and have grown steadily, surging in 2021 to carry traditional mithai to second place in the trend graph.

And therefore the Dessert section of this Collector's Edition is an exploration of Indian Mithai. Begin with savouring a visual representation of the sheer variety of Indian Mithai with our **Mithai map of India** (in no way comprehensive because the sheer range of Indian mithai could never fit on one page). Then turn the pages to explore this sweet topic further: Look Back at the evolution of Mithai as a cultural product, reflecting India's natural bounty, skilled artisans, and standing in the Indian way of life. **Look Forward** to the changing face and vocabulary of Mithai, even as it is being defined, as the renewed interest in the traditional sweet culture of India blends with international dessert trends. And finally, browse through our expert panel's **sweet predictions for 2022!**

- | | |
|----------------------|-----------------------|
| 1. Shufta | 16. Mysore Pak |
| 2. Mittha Sweet Rice | 17. Thalikala Paasham |
| 3. Bal Mithai | 18. Pootharekulu |
| 4. Kada Prashad | 19. Ada Pradhaman |
| 5. Ghiye ki Lauj | 20. Sakkarai Pongal |
| 6. Ghewar | 21. Sandesh |
| 7. Mohanthai | 22. Sel Roti |
| 8. Malaiyo | 23. Sweet Pithas |
| 9. Parwal ki Mithai | 24. Pukhleln |
| 10. Mawa Bati | 25. Kheertua |
| 11. Dumbu | 26. Koat Pitha |
| 12. Dehron | 27. Madhurjan Thongba |
| 13. Chenapoda | 28. Local Naga Gur |
| 14. Modak | 29. Bresi |
| 15. Bebinca | |



INDIAN MITHAI



Disclaimer - This Mithai map of India is a creative visualisation and is in no way comprehensive or definitive to encompass the sheer expanse of mithai in India.



INDIAN MITHAI - LOOKING BACK

INDIAN MITHAI MAKING HAS EVOLVED INTO AN ART FORM OVER CENTURIES THANKS TO A RICH REPERTOIRE OF INGREDIENTS FROM ACROSS THE LAND AND SKILLED CONFECTIONERS WHO TRANSFORMED THEM INTO A REPERTOIRE OF LEGENDARY OFFERINGS.

KUCH MEETHA HO JAAYE!

India’s love for meetha or sweet has bolstered a vibrant tradition of sweet making in the country. Be it Kashmir’s nut-laden Shufta, subtly-spiced Payasams of southern India, ghee-drenched Ghari from Surat in Gujarat, Bengal’s legendary

Sandesh or the delicate pithas of Odisha and Assam, the sheer range of flavours and textures Indian mithai comes in, makes it spectacular. The diversity has resulted from the amalgamation of art, science, traditions and techniques, over centuries,

inspiring Michael Krondl to write in his book, Sweet Inventions, “European languages simply do not have the vocabulary to describe the many sugary foods that Indians categorise as mithai in Hindi and mishti in Bengali.”

EVOLUTION OF A SWEET CULTURE

The stage was set for India’s mithai story millennia ago. Food historian KT Achaya documents sweets eaten by early Aryans in his book, The Story of Our Food, describing barley flour balls coated with honey, envelopes of dough stuffed with fillings of jaggery, coconut and sesame and fried in ghee, and varieties of laddus made of puffed rice, fried barley, sesame seeds and more.

The advent of sugarcane was crucial to the Indian Mithai evolution. “The cultivation of sugarcane began in India thousands of years ago and the art of refining sugar is also native

to this land,” shares renowned food historian Dr Pushpesh Pant. “People of this land developed techniques for making jaggery and molasses early on,” he adds. The adoption of sugar in food is documented in ancient texts like Patanjali’s Mahabhashya, a treatise on Sanskrit grammar, composed around the 2nd century BC that describes a gamut of sugar sweetened offerings from rice and milk puddings, to fermented drinks.

Medieval texts too chronicle numerous sweet confections, some of which bear striking resemblance to sweets savoured,

even today. The 11th century Kannada text Lokopakara, for instance, mentions ghee fried dough stuffed with coconut, dates, and sugar, which is strikingly similar to the gujiyas of today, while a yogurt, drained of whey to thicken, then sweetened and flavoured with spices to make Shikharini seems to be the ancestor of the modern-day Shrikhand. Also mentioned are elaborate Khand ladduge made of crumbled rice flour rotis, ghee, fermented milk, dried fruit, sugar syrup and aromatic spices like saffron and camphor.

A WORLD OF INFLUENCES

As mithai evolved, new ingredients and techniques came to be incorporated, thanks to a long history of diverse cultural interactions, exchanges and outside influences. Take Bengal for instance, famed today for its Channa based offerings. But Channa is conspicuous by its absence in medieval Bengali literary works, having entered the Bengali culinary scape much later - purportedly thanks to Portuguese popularising it during the colonial period. It caught the attention of the Moira community, Bengal’s halwais or

professional confectioners, who used Channa to create some of the most iconic mishti of the region including stars like the Sandesh and Roshogolla.

Across the country we see mithai evolve as a result of cross-cultural exchange. The ubiquitous halwa, for instance, is often dubbed as a Middle Eastern import to the royal kitchens of the Muslim dynasties that ruled India. “The name halwa, comes from the Middle East and literally means ‘sweet,’ points out author and chef Sadaf Hussain. Going

on to observe that in royal Indian kitchens, “halwa came to be made with everything from gosht (meat) and eggs to ginger, garlic, onions and chilies!” Food historian and television host Rakesh Raghunathan reaffirms this with the example of the glutinous Kozhikode halwa that hints at the influence of Arab traders on the cuisine of the region. “There are also dishes like the Dum Adai, of Tamil Nadu, evocative of the Middle Eastern Basbousa” he shares.

A LAND OF SWEET ICONS

With so many influences that shaped it, the Indian sweet repertoire covers a mind-boggling range of creations. Be it from the kitchens of homes or professional confectioners – sweet offerings harness a unique combination of regional ingredients, culinary ingenuity, sophisticated techniques and fine artistry.

Take for instance, the GI-tagged Mihidana of Bengal, that epitomises the skill of the Bengali mishti maker’s ingenuity. The

name literally means ‘fine grains’ and the dish calls for three different varieties of local rice treated with nuanced technique to make tiny saffron-hued pearls or beads. Then there is the Maharashtrian Kharvas, a tricky-to-make pudding of bovine colostrum, Rajasthan’s legendary Ghevar, and Andhra Pradesh’s Pootharekulu, wafer-thin sheets of rice starch dusted with sugar - each an icon of their regions.

Even within regions, we see interesting variations based on

the produce of the land. Take the payasam of Southern India. In Tamil Nadu Akkaraadisil, is a silken payasam that is a festive favourite in Tamil homes made of rice, moong dal, milk, ghee and jaggery, flavoured with nutmeg, mace, cardamom and saffron. In nearby Kerala, on the other hand, a favourite payasam is made with the Nendrapazham banana cooked in coconut milk and flavoured with dry ginger,” elaborates Raghunathan.

SWEETS FOR EVERY SEASON

While some sweets are resolutely regional, others are extremely seasonal. Sweets have been a vehicle of preventative medicine since the origins of Indian culinary culture. As evidenced by temple cuisines across the country whose sweet offerings often vary with seasons. “At the Nathdwara Temple in Rajasthan, a fudge-like halwa of ground almonds, slow-cooked on a leisurely flame for hours is offered in winter. During summers, when mangoes are in season, the Manohar laddoo – a besan laddoo flavoured with freshly squeezed aam ras and black cardamoms is a special offering,” shares Sujata Shukla, author of Bhog Naivedya a book that explores temple cuisines of India.

Seasonality in sweets consumption extends to home kitchens as well. With recipes for every season populating regional culinary repertoires.

“In Rajasthan, laddoos and churma made with Bajra and Jaggery are winter exclusives, while Jhajhariya, a confection of sweet corn roasted in ghee is a speciality during monsoons when corn is in season” shares caterer Abhilasha Jain. In nearby Punjab, Pinni - a robust sweet made of roasted wheat or ground black gram, enriched with nuts and edible gum - is a warming winter special.

In recent years, the diversity and complexity of Indian mithai has been stereotyped as

overly sweet and excessively calorific. The pandemic forced us to engage deeply with food, and revisit many aspects around food. The Indian mithai aficionado is reevaluating Indian mithai and realising that its value beyond mere sweet indulgence. Many traditional sweet offerings are complex constructs of ingenuity using nutritious, and fortifying natural ingredients. What’s even more exciting is that a new league of Indian mithaiwalas has come to the fore, with an aim to refresh the narrative around Indian mithai.



INDIAN MITHAI - LOOKING FORWARD

A LEAGUE OF NEW MITHAIWALAS ARE JUXTAPOSING UNUSUAL FLAVOURS, COUTURESQUE DESIGN, AND A NEW VOCABULARY WITH TRADITION TO DRIVE A RESURGENCE OF PRIDE IN INDIA’S RICH MITHAI HERITAGE.

WELCOME TO THE WORLD OF PROGRESSIVE LUXURY MITHAI!

Can a box of motichoor laddoos remind you of an Andy Warhol painting? Perhaps - if it came from Nihira, a Gurgaon-based confectionary brand run by mother-daughter duo Shubha and Arshya Aggarwal. But the quirky pop art colour scheme

isn’t the only thing striking about their offerings. Their confections are also full of surprises! Some of them come laced with premium liquor like red wine, Jägermeister, Sambuca and even Champagne. Others are infused with lavender and elderflower.

A CHANGING LANDSCAPE

A driving ambition in most of these new-age mithaiwalas is to revive the waning enthusiasm around traditional sweets and put Indian mithai on the global, progressive dessert map. “The trend in the West was rapidly shifting toward radical, Avant-garde desserts, while mithai was being resigned to nostalgia” observes Arshya. The cosmopolitan, globe-trotting, urban Indian consumer’s shifting palate and neophiliac cravings further set the stage for a change. “The younger generations often dismiss Indian mithai as boring. At Nihira we wanted to take mithai from ‘old school’ to uber cool,” she adds.

It is not just the consumer, but also the mithaiwala who is evolving. Take for instance the founders of Arq Mithai, Chefs Neha Lakhani is a Le Cordon Bleu trained French pastry chef, while Chef and Ashay Dhopatkar specialise in European Cuisine. At Arq, they combine French techniques with traditional craft of mithai making to create an exciting range of confections like gujiya stuffed with cinnamon-laced Granny Smith apples, and besan ki barfi that encase Belgian dark chocolate truffles.

Traditional mithai shops are also stepping up. In Bangalore, Arvind Dadu of 33-year-old Anand

Nihira is one vibrant example of a new league of mithai brands working to infuse quintessential Indian mithai with the oomph typically associated with fancy macarons, gourmet bonbons and opulent chocolate truffles.

Sweets shares how they have evolved. “We are traditionalists, but our attempt is to be the contemporary face of tradition. We focus on the best quality single-source ingredients, top class packaging and quality service at our store. All this helps us stay relevant and in demand despite the occurrence of the new age brands.” On the other end of the spectrum are players like mithai giant Bikanervala who launched Saugat, a progressive mithai boutique with offerings that could easily hold pride of place on petit four platters.



Picture courtesy: **Nihira**



Picture courtesy: **Arq**



Picture courtesy: **Bombay Sweet Shop**

REGIONAL REVIVAL

While progressive Indian chefs and mithai brands have been putting Indian sweets on avant garde menus in reimagined, sophisticated avatars, the focus is often on popular offerings like laddoos, halwas and jalebis. Delhi-based food researcher and culinary expert Tanushree Bhowmik points out that there is a vast unexplored, repertoire of regional sweets and confections steeped in history and rich culinary heritage, waiting to be explored. “The popular trend is to try fixing Indian sweets by casting them in Western moulds. It would be great to see more regional sweets, use of traditional natural sweeteners, and seasonal flavours permeating the modern

mithai scene.” Bhowmik herself recently collaborated with Rooh, one of New Delhi’s hottest fine-dining destinations, on a special tasting menu featuring Odisha’s temple sweets. The USP was a menu based on sound research and enlivened by lucid storytelling.

Storytelling is most certainly important to bringing Indian mithai back to its glory. India is home to a mind boggling assortment of micro-regional sweets that hold great cultural significance and sentimental value. The last two years have seen a growing interest and pride in all things Indian including regional sweet offerings.

THE EVOLVING MITHAI SPACE

The vision for new age mithai transcends gustatory pleasure, aspiring instead to be an immersive, multi-sensory experience, taking cue from codes of experiential dining - from visual drama and evocative storytelling to interactive spaces and enticing packaging.

At Bombay Sweet Shop for instance, guests can watch mithai-making processes through

large glass panels. “In the West, tourists often visit chocolateries and fromageries for culinary demonstrations. Indian mithai making traditions are equally rich and steeped in experiential intrigue” shares Yash Bhanage, partner at Bombay Sweet Shop by Hunger Inc. Hospitality. “But the traditional halwai’s workshop was shrouded in mystery, raising concerns around hygiene.” While quite a few mithai brands are

Conversations around GI have helped preserve and boost living, thriving traditions. Numerous e-commerce platforms have made micro-regional sweets accessible pan India and beyond to meet a growing demand.

Dadu observes, “Ultimately the old comfort products sell but we need to create hooks, a wow factor by adding products, categories and packaging that grab attention. And the messaging around ethnic products, their significance and nutritional benefits, needs to be highlighted boldly and loudly through innovative means to target the new age digital consumer.”.

working out of the cloud kitchen space, in the post-pandemic world, the physical mithai shop, Bhanage feels, will emerge as an important space for creating conversations around Indian sweet traditions.

A FINE BALANCE

Story, experience, luxury are all buzz words in the progressive Indian mithai story. But it goes beyond just using expensive ingredients or garnishes of gold leaf. Unlike traditional halwai shops where production was in thousands, with the modern mithaiwalla it’s all about small batches of artisanal mithai crafted in state of the art kitchens by globally trained chefs with immense respect accorded to traditional mithai making. “We want to give Indian mithai the finesse and sophistication that French pastries are known for,” says Lakhani “but it was imperative we learnt the intricacies of the traditional sweets we wanted to work with,” she adds.

Bhanage, echoes the sentiment, “the idea behind Bombay Sweet Shop was to weave new magic around mithai while celebrating

traditions and the nostalgia that mithai evokes.” The team invested heavily in R&D to strike the right balance. “The technicalities and complexities involved in making even the most familiar mithai like motichoor laddoos, was a revelation,” admits Chef Girish Nayak who travelled across the country to learn the ropes of Indian mithai making from traditional masters of the craft. The result is a gamut of offerings on the Bombay Sweet Shop menu that span the

spectrum from finely crafted classics to reinvented familiars such as Kaapi Pak - coffee-infused Mysore Pak, Ghevar tarts filled with ras malai and saffron-flavoured cream and more.

What directions this new narrative around Indian mithai will take, we can only imagine, but signs in the mithai box portent a lot more innovation, with options that will thrill the palette, but be cognisant of wellness and respect traditions.

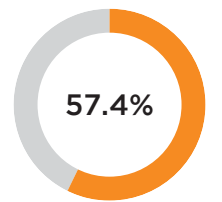




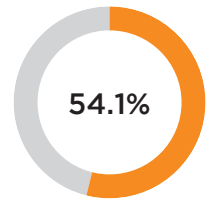
DESSERT TRENDS AT HOME



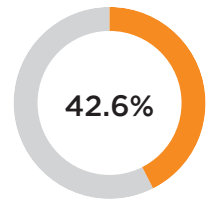
DESSERT TRENDS FROM OUTSIDE THE HOME



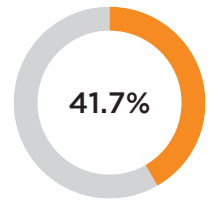
Bite sized, portion controlled desserts



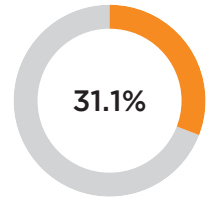
Desserts with healthier claims



Growing sense of pride in traditional, regional Indian sweets and mithais



Locally sourced, artisanal, and bean-to-bar chocolates



Special diet-based desserts (eg. keto brownies, vegan ice cream, etc.)

With sweets, India has always distinguished between home-made and out-sourced options. 2021 began with consumers still seeking comfort in sweet offerings of all kinds from laddus and halwas to cookies and cakes. But as the year progressed, concerns around long term health and wellness gained traction and the focus recalibrated. Our panel of experts continues to weigh in on **bite-sized, portion-controlled desserts** and **desserts with healthier claims** as top

consumer demands for 2022. However, it also observes a **growing sense of pride in traditional, regional Indian sweets and mithais** thanks to the uncertain times we are seeing. A mindset of savouring the present, has taken root and we observe a marked rise in celebrations of festivals and occasions with home-made traditional sweets. Sweets will continue to hold pride of place on home menus in 2022 but with an approach of controlled indulgence and moderation.

Sayantani Mahapatra



The pandemic has shown us life is short. There's no denying the fact that diet friendly desserts will also be in great demand. People will keep enjoying real desserts but in smaller portion sizes. We do not want to curb our cravings but see benefit in keeping them smaller.

Much as there is a great awareness and awakening to health and living, there is also a great awakening in the field of regional cuisine. Traditional food is gaining a lot of momentum and hence traditional desserts and mithais have also been an area of great exploration.



Marina Balakrishnan

Pooja Khanna



We have a growing sense of pride in traditional, regional Indian sweets and mithais. No festival is complete without traditional sweets at home and our country holds a gigantic treasure of such desserts! Thanks to social media connecting us to many more cultures, we are also sharing stories and emotions associated with festive foods.

The dessert market was one of the first segments to pivot from the Pandemic and we observed both traditional mithai and new-age professional confections saw a lot of growth and innovation. **Desserts with healthier claims** will prevail here as well, according to our expert panel. But **gourmet mithai** coming in a close second is evidence that celebrating occasions and traditional festivals with bespoke sweets is a trend that will only grow. No compromise indulgence is also on the rise as evidenced by our experts'

enthusiasm around **handmade artisanal ice cream**. While responsible indulgence driven by environmental concerns will see locally sourced, **artisanal, and bean-to-bar chocolates** continuing to flourish. When it comes to sweet options outside the home, the Indian consumer expects the dessert sector to deliver higher benchmarks. But the industry will rise to the challenge and 2022 will bring incredible offerings of all things local, artisanal, handmade and bespoke.

With Bombay Sweet Shop, we've seen the gourmet or luxury mithai market grow exponentially. The Indian consumer who has travelled extensively is seeking a contemporary version of mithai today. They want dessert experiences that marry traditional mithai with newer flavour combinations and textures and mithai that delivers on flavour with natural sweeteners as well as no-refined sugar, in line with the philosophy of moderation. Which is why taking the road less travelled we have reimagined Indian mithai, yet again - with the latest - Cheat Sweets collection made using 100% vegetarian ingredients and only natural sugars like dates, jaggery and coconut sugar.



Yash Bhanage

Chef Anahita Dhondy

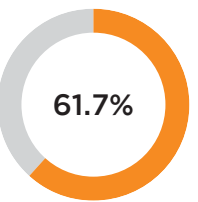


Artisanal ice creams are on the rise in a big way. I am seeing so many great gourmet ice cream brands entering the space. With interesting new flavour combinations and a product quality that is leagues ahead of commercial ice creams, handmade artisanal ice cream is a category that is going to stay and grow.

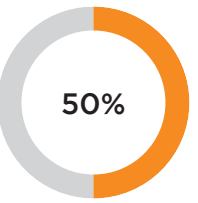
The huge demand for artisanal and gourmet ice-creams and meetha as well as local bean to bar chocolates like Mason & Co, Colocal and more! The phenomenal rise of offerings that are artisanal, handmade or bespoke has impacted the dessert category in the best possible way!



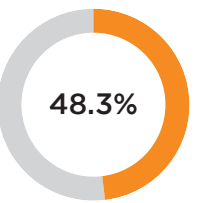
Rukshana A. Kapadia



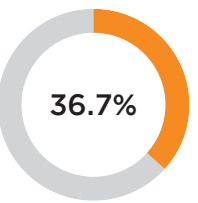
Desserts with healthier claims



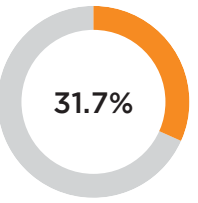
Gourmet mithai (high end options for traditional Indian sweets)



Handmade artisanal ice cream



Locally sourced, artisanal, and bean-to-bar chocolates



Petit (bite-sized) dessert portions

DIETARY FATS OF INDIA

Cooking fats have been intrinsic to the Indian diet. They have stayed prevalent in trend conversations throughout the previous 4 editions of the report with traditional fats slowly rising to the top. But the last two years have brought conversations on dietary fat into sharp focus. With health and nutrition experts reframing their role from detrimental to highly beneficial and consumers increasingly embracing the nutritive, therapeutic, and culinary benefits of fats. With eating for wellness in focus, 2022 is going to keep dietary and cooking fats on top of mind.

With this in mind, our deep dive for this section on health, hygiene and lifestyle starts with exploring the role of dietary and cooking fats in the Indian kitchen. Start with a **visual spread** that showcases the rich variety of dietary fats in India. Then **Look Back** at the role that fats have traditionally played, as carriers of flavour and nutrients, in Indian diets. **Look forward** to the renaissance of hyper-regional oils and fats, and growing interest in gourmet, flavour enhanced and value added fats. Finally, explore what our experts have to say about **health, hygiene and lifestyle trends for 2022**.



Disclaimer - This is a visual portrayal of dietary fats used in India and is in no way exhaustive or conclusive of the segment.

LOOKING BACK - TRADITIONAL



Mustard Oil



Groundnut Oil



Sesame Oil



Coconut Oil



Mahua Oil



Vanaspati



Alsi Ka Tel (Flaxseed Oil)



Butter



Ghee



Animal Fats (Suet And Lard)

LOOKING FORWARD - CONTEMPORARY



Rice Bran Oil



Extra Virgin Olive Oil



Soybean Oil



Almond Oil



Walnut Oil



Sunflower Oil



Safflower Oil



Cottonseed Oil



Canola/Rapeseed Oil



Palm Oil



Hemp Oil

DIETARY FATS OF INDIA - LOOKING BACK

IN INDIAN CULINARY CULTURE, DIETARY FATS AND COOKING MEDIUMS HOLD AN INTRINSIC SPACE. WHILE THE KIND OF FAT USED, QUANTITIES AND TREATMENT VARY FROM REGION TO REGION, THEIR ROLE IN INDIAN CUISINE IS FUNDAMENTAL. WHAT MAKES THEM SO SPECIAL?

THE FAT OF THE MATTER

It is well recognised that Indian food is an amalgamation of a host of ingredients and flavour builders, the most famous being our variety of spices. But one element that often gets left out of conversations, silently doing its job of bringing a dish together, is the cooking fat. This underdog of food groups is in fact one of the most important pillars of Indian cuisine and culinary culture.

Like every cuisine, Indian cuisine also subscribes to the universal law that fat makes anything taste better. But the roles that fats play go deeper. “Considering that we lived in climates that have always been extremely prone to microbiological intervention in food. Before refrigeration, our method of extending the shelf life of food in India was to treat it with high-temperature cooking in fat,” shares celebrated Chef Ranveer Brar. In fact, talna or frying is an ancient cooking

technique, even mentioned in the Rigveda, which documents that all frying at the time was done in ghee.

Indian cuisine’s fundamental link to spices also makes fatty cooking mediums essential. “A lot of our food is based on alchemy.” Brar elaborates, “to extract the flavour of spices, you have to take the oil route. Water doesn’t really cut it. The essential oils of spices need a fatty carrier medium to draw them out and dissipate their flavours.” This explanation points to the crucial technique of tempering, variously called tadka, chaunk, bagar, vaghar, phodni, phoron and more in local languages. The tadka calls for fat (ghee or oil) to be heated to a high temperature, to which a selection of whole spices are added so they splutter and crackle. It is either the starting point of cooking most dishes like subzis and curries, or the finishing of

some like dal. Either way, it rounds off the flavours of a dish. However, it has a deeper purpose that is often overlooked. That of augmenting the nutritional value of a dish. “Vegetables and spices are rich in fat soluble vitamins like A, D, E and K and the fat plays a carrier for these essential nutrients, aiding their absorption,” enlightens Amita Gadre, nutritionist and founder of Amita’s Holistic Nutrition.

Beyond frying and tempering, fats and fatty cooking mediums play many roles, like adding flavour, enhancing a dish’s appearance and fortifying nutritive values. Dhungar (smoking), Bhunana (sauteing), Kaadhna (cooking till the oil surfaces), are some key techniques in Indian cooking, all anchored on fat. And if nothing else, fat may be drizzled over to finish a dish, served as a dipping oil, or stirred in at the end of the cooking process.

MAKHAN AND GHEE, OR DAIRY BASED FATS

Makhan (white homemade butter) and ghee (clarified butter) have a long, illustrious history in Indian cuisine, going back to when cattle were first domesticated around 1500-500 BCE. Milk was available prolifically in the Vedic kitchen and yogurt, butter, buttermilk and ghee evolved as ways to make the most of milk in a climate where spoilage was inevitable. There are no written records from these times, but mythology and Vedic hymns offer literary evidence. The

Krishna Leela is full of stories of Krishna’s love for butter, and iconography often depicts his mother Devaki churning butter, baby Krishna eating it or young Krishna stealing it. The Rigveda, of 1000 BCE, also mentions dadhi (curd) and ghrit (ghee).

Ayurveda places a lot of importance on both butter and ghee. “There are detailed procedures and modes of preparation given in texts like the Ashtanga Hridaya and Bhojana Kutuhala,” shares Anushruti,

food writer and health and well-being consultant. “Butter is believed to benefit the eyes and tissues, sharpen the intellect and strengthen the Sapta Dhatus.” Ghee like butter is also believed to nourish all our tissues. “It also improves the strength of Agni, the digestive fire and is recommended for all seasons and all ages. According to modern nutrition, ghee is lipolytic in nature, which means it is a fat that breaks down all the other fats and is rich in all the fat soluble vitamins like A, D and E.”

PLANT-BASED EDIBLE OILS

Indian cuisine also traditionally used plant based oils. Oil extraction has been a part of Indian culinary culture since the bronze age when the first rudimentary oil presses came into existence. “The Aryans traditionally consumed ghee, because they raised cows and milk was available to them. By the Vedic period they had given up their nomadic lifestyle, settled in the Indus Valley region and began cultivating crops, including oil seeds. The earliest known oil was sesame oil.” enlightens food historian Dr Mohsina Mukkadam. Mustard is the other oil that has been part of Indian cuisine since ancient times.

Named for the kachi-ghanis or traditional oil presses, powered by bullocks, today Kachi Ghani Ka Tel or cold pressed seed oils are used across India although the oil used changes based on topography, geography and availability of ingredients.

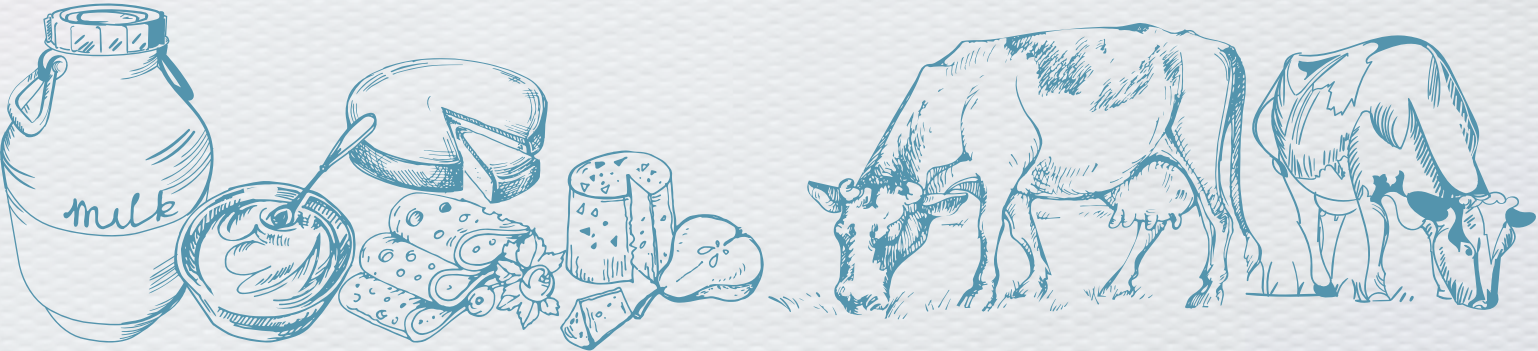
Mustard is favoured widely from Kashmir in the North, all the way to Rajasthan in the West, across Central and East India all the way to the North East. Maharashtra has traditionally used sesame and kardi oil (Safflower) oil, while Gujarat has used sesame oil. Along coastal Tamil Nadu and Kerala coconut oil becomes prominent.

However, regional usage also evolved over time. Today, most of Maharashtra, Gujarat, Karnataka, Andhra Pradesh and large parts of Tamil Nadu use groundnut or peanut oil which came to India as part of the Columbian exchange. “Singdane or Mungfali ka tel as it is known only came into our diet in the 20th century when we began cultivating peanuts and subsequently pressing them for their oil.” highlights Dr. Mukkadam.

Interestingly, tribal communities

across the country use very little oil. And what is used, comes from local plants. Where mahua grows, mahua oil is prevalent. “When I talked to the tribal communities I visited in Gujarat, they were shy about sharing that they eat dodi nu tel, which is mahua oil, and the fat of choice where mahua grows. In the Dang and all you have is the kharsali, or niger seed oil.” enlightens Sheetal Bhatt, chronicler of regional cuisines and food ways. In other other regions tribal communities also use animal fats like suet, lard and tallow as their primary cooking fat.

Despite a rich, nuanced tradition of use, fats have suffered a bad reputation, having been vilified for a number of reasons in the last decade. But recent years have seen a huge shift with traditional fats coming back in focus even as new age oils come into the market.



DIETARY FATS OF INDIA - LOOKING FORWARD

INDIA HAS A RICH LEGACY OF DIETARY FAT CONSUMPTION AND WAS LARGELY SELF-SUFFICIENT WITH EDIBLE OIL PRODUCTION, UNTIL THE 1900S WHEN SEVERAL FACTORS CATALYSED A SHIFT TO IMPORTED OIL.

DIETARY FAT MARKET EVOLUTION

Until the mid-1900s, India enjoyed around 95% self-sufficiency in edible oil production with ghee and traditional oils or “Kachi Ghani ka tel” being consumed, largely. Until a growing demand for cooking mediums in the ‘70s catalysed many changes.

“With increasing demands for ghee, vanaspati was introduced and marketed as an alternative,” shares Anusha Murthy, co-founder of Edible Issues. A collective that fosters conversations on Indian Food Systems, Edible Issues recently did a deep dive called #OilYouNeed to study the Edible Oil market in India. Vanaspati mimicked ghee in texture, but yielded better results in frying and flavour and

came at a fraction of the price. Its popularity led to decreased demand for oilseeds causing financial instability for farmers. “But the growing population also drove up demand for edible oils, so India began to import heavily, observes Murthy. She adds “In 1977, the government introduced Operation Golden Flow, to consolidate and package homegrown edible oils and reduce dependency on imported oils.” Around 1998, the Government also reduced import duty on edible oils, thereby completely changing how India cooked. And imported palm and soybean oils have been the most used oils in India ever since.

Price consciousness and mixed messaging further affected the market. “Sesame oil was

the original cooking medium in Gujarati kitchens, but it became a little egalitarian, and peanut oil replaced it. Lately, Kapasia (cottonseed oil) has similarly taken over, but instead of the original Desi Kapas, BT cotton oil is pervading, and that shouldn’t be consumed at all!” emphasises Sheetal Bhatt, chronicler of regional cuisine and foodways.

“Growing up in the 1980’s we were conditioned by marketing to think that traditional fats are bad and modern refined oils were good. Even today there is conflicting information as far as traditional fat usage is concerned,” laments Kalyan Karmakar, food writer and consultant at Finely Chopped.

TIME FOR SERIOUS INTROSPECTION

“Fat is the most calorie dense of the three macronutrients,” explains Amita Gadre, nutritionist, and founder of Amita’s Holistic Nutrition. “But fat is not limited to visible fat like butter, ghee and oil,” she points out. We draw a significant percentage of fats from foods like meat, eggs, dairy products, seeds and

nuts. The alarming aspect is the hidden fats that we consume unknowingly. “Like the trans fat in hydrogenated and partially hydrogenated vegetable oil, that’s directly linked to increased bad cholesterol. This trans fat is hidden in ready-to-eat snacks and ultra-processed food.” While there has been an uptick in low

and zero oil cooking solutions, like the air-fryer, oil sprays and non-stick foils, fats are an important source of energy for the body to run like a well oiled machine. “We need to be conscious about the quantity and quality of fat coming onto our plates,” emphasises Gadre.



WINDS OF CHANGE

Over the last few years, thanks to a number of factors, we have seen a growing shift back to traditional oils. In August 2021 the Indian government launched a self-sufficiency campaign. “With India’s oil self-sufficiency being restored, our reliance on imported oils will decrease significantly,” observes Murthy.

“The general factors behind consumer food choices are price, taste, and convenience. But Indians today are increasingly focusing on the health factor of their food. This has naturally shifted focus on making sure we eat healthier oils as well,” she concludes.

Where consumers once made choices based on messaging, today, the average Indian consumer is smart, knows how to read labels and understands the science and composition behind their foods.

RESURRECTION OF TRADITIONAL FATS

While traditional fats are growing in popularity, there is also a lot of innovation happening in the dietary fat segment across the food industry.

“I’m happy to see a lot of chefs understanding that refined oil is just neutral fat, and recognising the value and the potential of our traditional oils for flavour, like the beauty of kacha mustard oil used to finish a bharta and chokha, for example! “The concept has inspired an “Indian wasabi”, by blending green peas with raw mustard oil for that pungent taste!” shares Chef Bali, corporate chef, Oberoi Centre of Learning and Development.

Home chefs have also been a strong driving force behind the growth of traditional oils.

“The best food I’ve eaten in the pandemic has come from home chefs,” shares Karmakar, “And this comes from them being rigid about the quality of ingredients, including the oil and ghee they use.” He observes this is also driven by small businesses that have made quality local, regional ingredients accessible in recent times. Marina Balakrishnan, whose pandemic baby, Oottupura, specialises in plant-based Kerala cuisine, agrees. “The quality of coconut oil used in Kerala cuisine is fundamental to getting the right balance.” She was forced to use what was available in Mumbai during the pandemic but got her family to send her freshly pressed coconut oil from Kerala. “But that’s not always feasible. Luckily I finally zeroed in on Inara, a small

business that gives me quality I can depend on,” she sighs.

Ghee and its benefits are also being rediscovered, especially traditional cultured ghee, considered ideal for both its flavour and medicinal properties. “We observed that all cooking starts with a cooking medium. And ghee is the best traditional option. So we worked to craft a ghee that is rich in texture, flavour and nutritive properties and can be used to cook anything from dal to pasta or even as a finishing drizzle” shares Robin Nagar, CEO & Co-founder of Valley Culture. “We put a lot of time and focus into each batch to get the right results, adds his partner Vaidya Shikha Prakash, an ayurvedic physician who oversees its production..

NEW HORIZONS

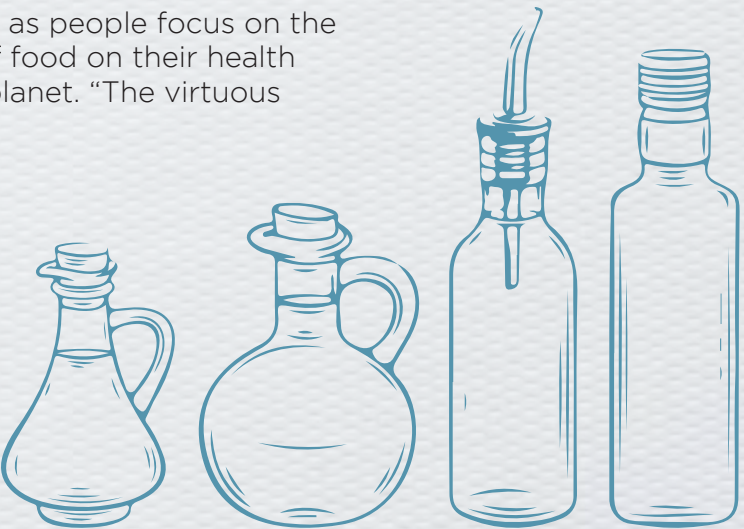
A new oil that has been causing a stir is Hemp oil. “It’s our best selling product”, says Yash Kotak, whose company, Bombay Hemp Company, sells hemp oil and other hemp products. “Hemp offers a plant-based fat with all the same nutrition as cod liver oil, if not more.” And is rich in Vitamin E, D, B1 and B2, essential fatty acids like Omega 6 and Omega 3, minerals like potassium, magnesium, iron, zinc, calcium, and phosphorus and antioxidants, he explains.

The traditional tadka landscape is also evolving. El the Cook, a brand that creates convenient, time-saving solutions for the kitchen, launches a range of

tadka oils in 2019. “Our tadkas expertly marry spices with fats such as ghee or cold-pressed oils to create ready-to-cook tadka mixes for curries, dals to even rice preparations.” shares Elton Fernandes, founder of El The Cook.

circle is coming to a close. We moved away from traditional fats and are now coming back to them because we are realising their benefits and returning to our roots,” sums up Yash Kotak, Co-founder and CMO of BOHECO.

Many factors are converging to take traditional fats to a whole new level as people focus on the effects of food on their health and the planet. “The virtuous

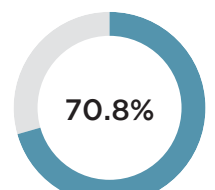




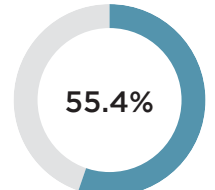
HEALTH AND LIFESTYLE TRENDS IN HOME KITCHENS



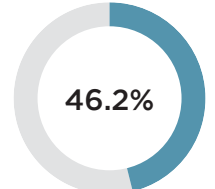
HEALTH AND LIFESTYLE TRENDS IN RESTAURANTS



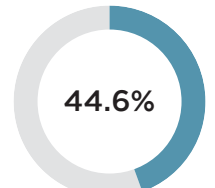
Clean, hygienically packaged meats and seafood



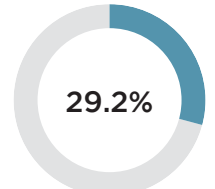
Personally Optimised Diets



Proactive use of home pest relief, hygiene and sanitation products



Greater focus on protein in meal planning



Increased attention to local, seasonal and native ingredients

Health, immunity, clean eating, and the overall impact of food practices on both family and environmental well-being are on the radar of the conscious consumer more than ever. And 2022 will put them front and centre, on an almost non-negotiable basis. A growing focus on the link between protein rich diets and immunity boosting and need for food safety has almost three fourths of our panel weighing in on the need for **clean, hygienically packaged meats**

and seafood from trusted sources. With eating for wellness being top priority, the focus will be on intuition-based eating to forge a good relationship with food. Diet choices are going to be intensely personal and based on individual choice and preference making **personally optimised diets** of growing interest. And a critical need to ensure our home bubbles are safe, there will be a rise in **proactive use of home pest relief, hygiene and sanitation products.**

Monika Manchanda



People are realising that eating healthy doesn't mean they shouldn't enjoy food. They are demanding that they get delicious food that matches their goals. At LiveAltLife, we have seen it consistently in diabetic snacks and dessert demands.

With time and mobility constraints, clean and hygienically packaged, home-delivered meat and seafood is the best alternative to going to the market. Especially now, with an emphasis on the importance of increased proteins in our diet for immunity.



Madhushree Basu Roy

Nandita Iyer



Our local, seasonal fruits and vegetables, especially like green leafy vegetables, have micronutrients responsible for a whole lot of body functions like immunity, protection from cancer, protection from other chronic diseases and more. Initially it takes some effort to align with eating locally, seasonally, but now that we're embracing these health benefits, we're investing that time and effort.

Mindful eating, psychological well-being, and our impact on the economy and environment are all top-of-mind in 2022. Dining out will still be approached with caution but there is a positivity in the air with many consumers embracing the revival of the food and beverage industry. The happy fallout of the last two years is that consumers today are choosing to vote with their fork. Our expert panel sees the consumer, mindful

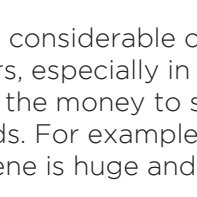
of the impact their choices have on the environment, making conscious choices to support **buying from local farmers and food producers.** The increased consciousness of the impact of food on individual wellness will see growing demand for menus that **source local and seasonal ingredients** and cater to **specific lifestyle-based diet menus** such as gluten-free, vegan and more.

Chef Shagun Mehra



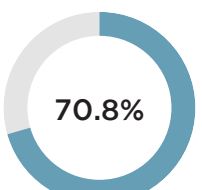
I believe indigenous Indian ingredients are just as gourmet as the exotic ones we chase after. The challenge lies with the chef, to do something really creative and delicious with it, so that casual diners and serious gourmands alike can change their perceptions about the incredible native produce we so often take for granted or cast aside as boring.

Saina Jayapal

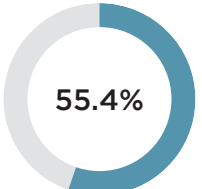


There is a considerable category of lifestyle-driven consumers, especially in metros like Bangalore, who also have the money to spend on food that meets their needs. For example, the Vegan and plant-based scene is huge and growing.

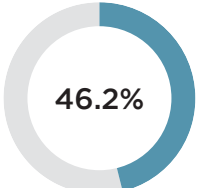
Chef Thomas Zacharias



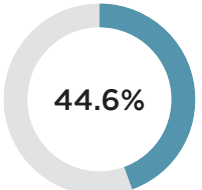
Buying from local farmers and food producers



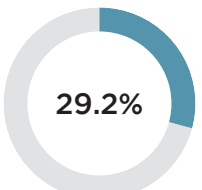
Local and seasonal ingredients sourcing



Specific lifestyle-based diet menus (eg. Gluten-free, Vegan, Keto etc.)



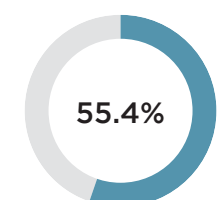
Eco friendly kitchens (reduction of plastic for storage and delivery)



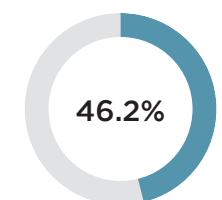
Innovative use of kitchen 'waste' (eg. Nose-to-tail, Root-to-leaf, etc)



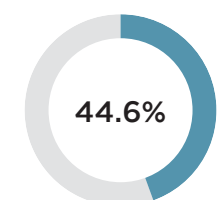
HYGIENE AND SANITATION TRENDS IN RESTAURANTS



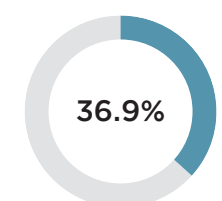
Design that allows for lighter, airier, well ventilated spaces



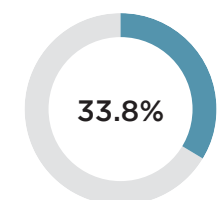
Design around contactless, digital dining solutions



Antimicrobial, easy-to-clean surfaces/coatings for worktops



Naked kitchens/live cameras in kitchens (ie. kitchen in full public view for transparency)



Options for touch-free/hands free solutions to limit surface contact

Safety and sanitation standards have always been important considerations in the F&B industry. But with the current focus on health and hygiene, commercial kitchen and restaurant spaces will see significant evolution to accommodate new hygiene, sanitation and food safety requirements, as well as new, innovative

and hybrid models of food service. Our panel predicts that we will see **design that allows for lighter, airier, well ventilated spaces** to dine out at. We can also expect massive evolution in **design around contactless, digital dining solutions**, to enable newer formats of service.

Chef Shriya Shetty



Naked kitchens are becoming increasingly popular, more and more restaurants have at least one part of the kitchen as a show kitchen. This is a win-win situation because it pushes kitchen staff to be disciplined in their work and also reassures guests about the stringent hygiene and sanitation protocols being practised by the restaurant.

Diners will continue to prefer brands that take the necessary steps to ensure cleanliness and hygiene. With this being top of mind, the industry is moving towards simplifying operations so that stringent sanitation protocols can be maintained without compromising on high quality service.



Hans Sadhu

Ketan SS Goyal



Physical menus are touched by countless diners and servers everyday - they are the dirtiest, and the last things you'd want to touch at a restaurant, especially in these times. Thanks to digital menus I don't think we will be using too many physical menus going forward!

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INDIAN KITCHENWARE - AN EXPLORATION

Utensils are fundamental to the acts of cooking and eating in any cuisine. The first conversations around kitchenware were around convenience. Then came the first explorations of regional cuisines that brought traditional cookware into focus in 2019. Inevitable, considering regional cuisines, reflect utensil usage based on culinary evolution and local requirement. This allure accelerated into a groundswell in 2020 as concerns around health and immunity drove study and exploration into kitchenware as well.

Indians are taking custodianship of India's culinary culture and engaging in unprecedented study, exploration and chronicling of varied aspects of it across the Indian food Industry. To stay abreast of this vibrant developing discourse, this Collector's Edition introduces a new section on Food studies. Start with a visual look at the **Evolution of Desi Bartans**. Then turn the pages to **Look Back** at the role kitchenware has in Indian culinary culture. **Look Forward** to the ongoing revival of traditional kitchenware and finally, browse through our expert panel's insights on **the narrative around food studies in 2022!**



Disclaimer - This visual is a creative representation of the evolution of traditional cookware through the ages. It is in no way an exhaustive or absolute representation.

OLD AGE



POTTERY
(18000 YEARS AGO)



STONE
(1900 BCE)



COPPER
(9000 BCE)



BRONZE
(2000 BCE)



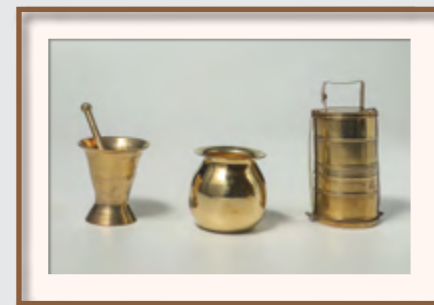
CAST IRON
(1200 BCE)



CLAY
(500 BCE)



PORCELAIN
(618-907 CE)



BRONZE
(4500 BC)

NEW AGE



CAST IRON



ALUMINIUM
(POST 1890)



STAINLESS STEEL
(19TH CENTURY)



CERAMIC



TEFLON
(1960)

The evolution of cookware is a depiction of our culinary heritage and consumption trajectory. Dictated by climate and culinary practices of various regions, kitchenware evolved to meet changing needs, using available material and ever advancing manufacturing techniques over centuries.

INDIAN KITCHENWARE: LOOKING BACK

TRADITIONAL INDIAN KITCHENWARE HAS COME OUT OF THE CUPBOARDS IT WAS RELEGATED TO, TO RECLAIM ITS RIGHTFUL SPACE IN HOME KITCHENS, RESTAURANTS, AND EVEN SOCIAL MEDIA

ANCIENT LEGACIES

Man has been cooking food for over a hundred thousand years. And kitchenware - for cooking and eating from - has existed ever since, evolving with the human race. Rudimentary receptacles of leaves or cookware of bark and leather bags evolved into items moulded from clay, hewn of wood and stone, and fashioned of metal.

Over time, they expanded in scope from merely being functional to being valued, as implements, status symbols, gifts - particularly as part of dowries, and family heirlooms.

In the last few decades, the Indian kitchen has seen huge transformations. As cooking on firewood was replaced by

chullahs, then gas stoves, and today electric heaters and induction cooktops, a parallel evolution in kitchen ware has taken place. Innovation also brought the advent of materials like enamel and ceramic, cheaper metals like aluminium and steel, and technologies like non-stick and teflon into play.

EVOLUTION THROUGH THE AGES

“We’ve been cooking our food for at least a hundred thousand years, if not more” says Kurush Dalal, archaeologist, historian and culinary anthropologist. “While there was a lot of roast and braised food at the time, there was also boiled food.” And the cooking vessels used, he goes on to elaborate, were usually made of birch bark or leather fashioned into rudimentary bags that would be suspended over fires for cooking.

Clay vessels came in next, around 9000 years ago, and remained in use through the bronze age and continue to be used even today. “We find evidence of these clay vessels in the Ganga

Valley and in the North West Frontier Province” shares Dalal, going on to describe that their form was essentially globular with upturned rims to make holding them convenient. Initially fragile and brittle, advances in the pottery technique led to clay vessels becoming sturdier and variants such as glazed and terracotta ware coming into existence. Regional influences like locally available materials and design sensibilities of local artisans also began to reflect in their manufacture. The Gul Mohammad Style, Faiz Muhammad style, Naal, and Ambri are some examples of the finest pottery - all distinct in design, shape and material from

the pre-Harappan period.

The first use of metal started about 3000 years ago. Copper did exist but was expensive and stone was hard to handle and carve. The advent of iron production offered a cheaper, more convenient option and was rapidly adopted into the mainstream, sidelining clay. However, iron and clay kitchenware stayed in favour for a long time. “New-age metals like aluminium and steel are fairly recent, and became popular in the last 100 years or so, they started manufacturing only after electricity came in,” sums up Dalal.

REGIONAL EVOLUTIONS IN DESIGN AND USAGE

In medieval times, while iron was used across India, many other metals became popular too, based on the local availability of materials and artisans. Brass, bronze, copper, cast iron, phool and tin evolved differently from region to region, in shape, size and usage. As did alloys of these metals. In the North, kadhais, paraats, patilas, lagans and handis, were common, while the Southern states used urlis, chattis, kindlis, and topes. Material wise, the North favoured brass, copper and iron while the South used bell metal, bronze, cast iron and clay. Eastern India preferred kansa, an alloy so pure that nothing would react with it, while the West favoured brass. Ceramic, clay, terracotta, and stoneware were also used — but never became as popular as metal.

“In our family we had wide copper lagans that were used to make mutton curry and biryani,” reminisces chef Kishi Arora, whose family hails from two different parts of Uttar Pradesh but has roots in Punjab. “There were brass kadhais, paraats, bhagonas and even thalis and glasses that we used regularly at home until recently.” Going on to observe that copper and brass utensils needed regular kalai, or tinning, without which food can react adversely with them. Perhaps one of the reasons their usage declined in the last few decades, in favour of the unreactive, and easy to maintain stainless steel.

“In Kerala, most of the cooking was done in either bell metal urlis or clay chattis,” shares Chef Regi Matthew of Kappa

Chakka Kandhari, himself a proud collector of heirloom utensils, that he displays in a mini museum in his Chennai office. These urlis ranged from 5 to 150 litres in size and were used for everything — the smaller ones for cooking at home and larger ones for boiling paddy in the fields to. “Clay pots were only used to make thin curries. The porous nature of the pot ensured the curry thickened and the breathing nature of the vessel helped the curry last longer.” This property is probably why clay and terracotta are still popular today, not only in Kerala but kitchens all over India, including far-off Bihar, Rajasthan, and Uttar Pradesh. Valued for the texture they lend to curd set in them and the flavour they impart to meat, dal and curries cooked in them.

TRADITIONAL COOKWARE AND WELLNESS

Utensils in India are not just receptacles used to cook or serve in. With evolution, different materials were found to fortify foods cooked or served in them, with nutritional benefits. Cooking in iron, for example, is believed to improve the iron content of foods, copper is antimicrobial, clay neutralises acids in food while fortifying it with essential minerals, soapstone fortifies calcium content, and tin is believed to prevent diseases like diabetes. “When you cook in traditional cookware you get multiple benefits,” observes Meera Ramakrishnan of Zishta, who not only works extensively with craftsmen to make traditional utensils using age-old methods but also studies the effect of the metals on food cooked in them.

In addition to food acquiring nutritive properties of utensils, chemistry and alchemy come into play as well. “When you cook rasam in eeya chombu, the tamarind and pepper in it react with tin to produce the trademark aroma, flavours and taste,” adds Ramakrishnan. Cooking in different materials adds distinct flavour notes to foods cooked in them. An aspect of cooking in traditional cookware that has been lost in new-age kitchenware that, being designed to be non reactive,

loses upto 60% nutrition and contributes nothing to flavours of food.

One notable point however is that traditional metal utensils, if used unwisely, can have negative effects. Metals should be checked for hazardous substances and impurities in large quantities which may react adversely with, or cause excess metal to leach into foods cooked in them, rendering them unfit for consumption. Which is why the crop of new age bartanwallas go the extra mile to educate consumers on the nuances of cooking in specific materials

and their effects. Championing the belief that with basic precautions such as; avoiding cooking acidic foods in certain metals, transferring foods once cooked, and proper care and maintenance, every traditional metal is preferable to new-age utensils.

A belief that is resonating with an increasing number of consumers and driving a groundswell of interest in traditional kitchenware that commensurate brands are entering the market to meet.



INDIAN KITCHENWARE: LOOKING FORWARD

FROM ONLINE PLATFORMS, TO HOME AND PROFESSIONAL KITCHENS, TRADITIONAL INDIAN KITCHENWARE HAS TAKEN BACK ITS RIGHTFUL SPACE, EVEN AS NEWER MILLENNIAL BRANDS, ARE REINVENTING THE SEGMENT.

RETURN TO TRADITION

If social media is any measure, then clay, stone, kansa, brass, bronze, and cast iron are here to stay. Home kitchens are pulling out heirloom utensils, and consumers, once driven by

convenience, are today returning to time tested traditional kitchenware. Recent years have seen a growing shift to traditional kitchenware. Driving this rediscovery are a slew of

new brands that have entered the segment with products that marry traditional knowledge and craftsmanship with new techniques and modern design sensibilities.

TRADITIONAL COOKWARE AND MINDFULNESS

A primary driver of this revival is a growing mindfulness around healthy cooking practices. Recent years have brought awareness about the benefits of cooking and eating from traditional metals to the fore as the ill effects of newer materials like melamine, plastic and aluminium were discovered. According to Meera Ramakrishnan of Zishta the post pandemic kitchen saw everyone’s focus shift towards healthier practices driving a revival of traditional cookware, which have always been valued for the health benefits they impart. “Younger millennials also started cooking at home, and were in fact, the highest spending segment to invest in traditional cookware,” she concludes.

“Traditional cookware has stood the test of time,” observes Seemantini Mihir, co-founder at Studio Coppre. “It has been in use for much longer than modern utensils. Also, the non-stick cookware of today’s times has clearly proven to be extremely dangerous for health. Traditional ways of cooking”, she adds, “are not only good for gut health, but mineral and nutrient absorption are also well balanced when you cook in traditional utensils.” The benefits from cooking in traditional metals are endless. For instance, we now know that Kansa cures imbalances in the body, strengthens bones, promotes healthy red blood cell formation and regulates the thyroid gland. Brass helps promote hair health and production of melanin. Copper

is greatly favoured for storing water because it kills harmful bacteria. Bronze prevents diabetes and skin disorders with regular use.

“Traditional cookware are great conductors of heat. This not only helps in better cooking but also translates into great taste,” informs Krish Ashok, author of Masala Lab. According to Ashok, the searing and grilling of meat, the browning of dosa, and the simmering of curry are all better when done in traditional materials like copper, iron, clay or bronze. Steel too, he says, is great for cooking. “Even though it does not add nutrition to the food, its inertness means there is no harmful leeching in the food, which is seen in melamine, non-stick, or other such materials.”

CHAMPIONING LOCAL ARTISANS

Wellness is not the only reason, traditional cookware is seeing so much adoption. Many consumers are also looking at it as a way to support the revival and protection of dying crafts of bartan-making and metallurgy. Until recently, there was a steady decline in the number of foundries across the country, with craftsmen moving to other sources of employment. However, thanks to the efforts of a few new-age entrepreneurs and renewed consumer interest the sector has somewhat stabilised.

Studio Coppre, set up in 2014 in Pune, was one of the first to work in the segment. They wanted to create a product that

evoked nostalgia but also had contemporary appeal. According to co-founder Seemanitni Mihir, they started with copper artefacts and kitchenware, but took up championing artisans to conserve heritage and drive recognition for local culture. These moves, in Mihir’s opinion, are the way forward for artisanal communities. And Studio Coppre now works with many different craft clusters across the country.

Mihir was not the only one thinking in this direction. Meera Ramakrishnan of Zishta resonates. “When we started researching for our brand we realised that many of the artisans in Tamil Nadu were struggling to sustain their craft because of

dwindling customer adoption, lack of market reach beyond nearby towns, no appreciation for their craft and work, and their inability to scale up. So Zishta focused energies on reviving the traditions behind these crafts rather than just developing products. Similar passion drove Aditya Agrawal of P-TAL, to champion and nurture the craft of brass utensil making. Observing the plight of thatheras during a college project, and realising the craft was dying as younger generations of this artisan community moved to other occupations, Agarwal with his two colleagues have since redesigned and re-conceptualised brass utensils for the urban market at P-TAL.

SUSTAINABLE KITCHENS AND LIFESTYLES

When traditional cookware started seeing a revival a few years ago, almost all the customers were motivated by nostalgia. In recent years though, a whole new segment is adopting traditional cookware for its sustainability. “In the last few years, we’ve observed a major shift towards sustainable living. Buyers are making conscious lifestyle choices towards traditional ways of living,” shares Mallika Buddhiraja of Baarique, a brand that specialises in high-end traditional Kansa tableware. They chose to focus specifically on Kansa products because they are safest to use.

traditional materials. Kansa (bronze) and Tamba (copper) appeal to all generations and offer other benefits with respect to ayurveda, sustainability and fuss free usability.” Baarique’s signature style of embellishing their products with painting in traditional styles also appeals to the new aesthetically inclined consumer.

According to Kaviya Maria Cherian, founder of Green Heirloom, lifestyle upgrades have converted a whole new segment of consumers. “I can see my audience making the switch from their current cookware to traditional ones,” she shares. Green Heirloom is a Kerala based brand that works with local artisans to create new-age styles for modern kitchens. “It is not just the health aspect

or stories behind traditional cookware that are drawing the modern consumer, but also the knowledge that most traditional cookware can stand the test of time, making them a wise investment,” adds Cherian. “That the products look good and carry a sense of exclusivity is an added attraction.” she concludes.

Whatever the motivations, the modern, post-pandemic kitchen is clearly endorsing traditional kitchenware like never before. Local, sustainable, aesthetic, and instagrammable – these bartans check all the right boxes for the consumer of 2022 and seem to be here for the long haul.



Picture courtesy: **P-TAL**



Picture courtesy: **Green Heirloom**



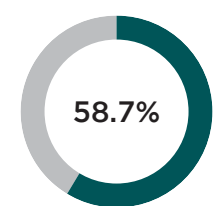
Picture courtesy: **Zishta**



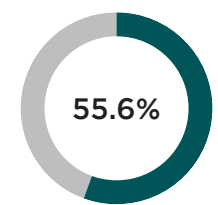


FOOD STUDIES AT HOME

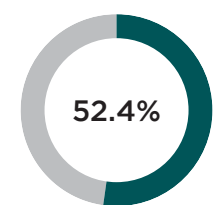
FOOD STUDIES AMONG PROFESSIONALS



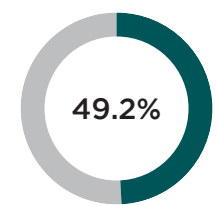
Documenting culinary heritage



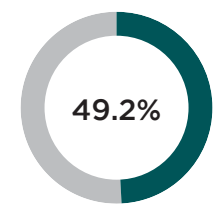
Cooking classes and workshops



Food studies courses (eg. food writing, food history, food science, etc.)



Food & beverage appreciation experiences



Self studies and exploration through content consumption

In 2022 our panel of experts has observed a phenomenal spike in interest around food studies. A desire to go beyond merely cooking and eating food for sustenance. Be it a new found pride in culinary identity, a desire to examine various aspects of food, engage in culinary hobby and appreciation explorations or strengthen a career in food. In the coming year, curiosity

will drive unprecedented interest in **documenting culinary heritage**. Chroniclers and students of food will engage more than ever with educators across social, economic and physical distances to level-up knowledge through **cooking classes and workshops and food studies courses** spanning subjects as varied as writing, history, politics, science of food and beyond.

Shubhra Chatterji



From what I see, the food studies world is ready to move to Level 2. Skilling up, and deeper investigations into specialised subjects will be key in 2022.

Everyone eats - and you don't have to be from a hospitality background to be curious to learn more about food or the food system. I think learning about food could move from more accessible spaces like Instagram to more focussed and niche upskilling spaces and literature on food and culture.



Elizabeth Yorke

Ragini Kashyap



Most people want to know how to cook or experience new foods. A smaller subset wants to learn to make a business out of food. And then there are a few that want to engage with their food more deeply. For them, there is now motivation to understand context - origin, geography, economics and more. And a small but growing community of researchers have made it accessible and indeed fashionable to find out more about what's on your plate.

As the industry continues to face challenges, the industry is using this time to augment their skills and knowledge. Our panel is excited to see the interest both upcoming and established F&B professionals are exhibiting towards becoming **super-specialists in hospitality niches**, through advanced programs in wine, mixology, pastry, food science

and more. Some are seeking to **diversify their skills within the hospitality sector**, opening themselves up to more opportunities. Our panel also observes almost as much interest in **regional culinary exploration through food books** as the industry demonstrates the importance of studying our culinary heritage in all its richness and diversity.

I think that food history is never going to go out of fashion. And food science is the next big thing. We need to have a cultural and historical perspective on cuisine, to understand where we're coming from to understand where we're going. Food science because we're realising the limitations of medicine and the power of food as medicine. Food genuinely fills in! So studies of these or anything that brings these two together, will have perennial and sustainable space in food studies and where we should all be investing our energies.



Chef Ranveer Brar

Chef Sushil Dwarakanath

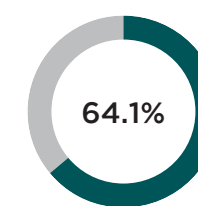


People are looking to build on their existing skill sets, they are looking to super specialise. So chefs may look at mastering sushi skills, patissiers may learn sugar art. I also foresee F&B professionals seeking skill diversification in allied areas that will support or enhance their primary skill. Things like marketing, photography, or social media, which will give them a level up.

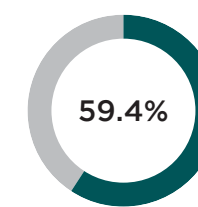
Food sociology and anthropology have already long been a part of our syllabus at WGSMA. And this year we have introduced a Master's Degree in Indian Cuisine and Culture, covering regional, micro and temple cuisines, Indian halwai, and more. Today, consumers want to be aware about the history of a dish and the origin of its ingredients. Chefs and culinary experts active in the digital space are pushing this evolution by sharing their knowledge with the masses. Hospitality students need to learn how to evolve and advance with these changing trends.



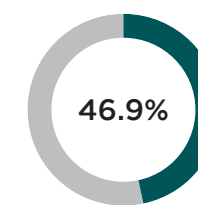
Chef Thirugnanasambantham K



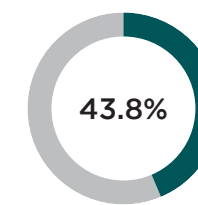
Super-specialisation in hospitality programs (eg. specialisation in Wines, Mixology, Breads, etc)



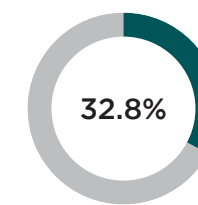
Skill diversification in hospitality programs (eg. food writing, photography, styling, etc)



Growth in regional culinary exploration through food books



Reskilling & upskilling through certificate and diploma courses



Culinary field research and residencies

EMERGING CONVERSATIONS

PLANT BASED FOODS OF INDIA

Emerging Conversation is a section in which we focus on trends that are beginning to make a mark. And for it, this Collector's Edition deep dives into two topics that have seen a lot of excitement over the last four editions of the report: Fermentation and Plant Based Foods. Especially because each of these concepts have different implications when it comes to Indian culinary culture. Culinary cultures all over the world evolved independently based on natural resources. And the way India eats can be attributed largely to its climate and topography. India's richest natural resource is its plant biodiversity resulting in a plant forward cuisine that made ingenious use of its richest resource - a diverse bounty of plants, to hone a diet rich in plant based macro nutrients in the form of cereals and pulses, micronutrients from a deep seated philosophy of food for wellness and practices that harness natural energy resources of the food cycle.

Harnessing natural energy resources such as sunlight in arid regions and the humidity in the tropics, Indian culinary culture also created a staggering variety of supplementary foods such as plant-based vegetable and meat alternatives, dried protein based alternatives and fermented foods amongst others. In this special section, we start by examining the evolution of plant-forward dining with a visual spread showcasing **Plant-based foods of India**. Then turn the pages to **Look Back** at the evolution of plant-forward culinary traditions in India. **Look Forward** to the revival of new age plant-based foods, and browse on through our survey on **emerging conversations around Food and Beverage in 2022**. Finally turn the pages to explore **India's rich culture of fermentation**.



Disclaimer - This is a creative representation of the evolution of India's plant-based foods over time. It is by no means comprehensive or definitive of the vast array of plant-based alternatives in the Indian culinary repertoire.

TRADITIONAL



Badi



Papad



Gatta



Dal Dhokli

- **Badi** - (sun dried lentil dumplings)
- **Papad** - (sun dried sheets of spiced lentil or vegetable doughs)
- **Gatta** - (steamed gram flour dumplings)
- **Dal Dhokli** - (one pot meal of pasta like sheets cooked in dal)

TRANSITIONAL



Jackfruit/ Kathal



Soya

- **Jackfruit/ Kathal** - (original 'mock meat' of the Indian kitchen)
- **Soya** - (soya based nuggets, chunks and granules)

CONTEMPORARY



Tempeh



Tofu



Cultured meat



Impossible burger

- **Tempeh** - (fermented, soybean bases sheets or cakes)
- **Tofu** - (compressed soy milk curd/cheese)
- **Cultured meat** - (meat engineered into cellular agriculture)
- **Impossible burger** - (plant-based representation of a meat burger)

LOOKING BACK - PLANT BASED FOODS IN INDIA

THROUGH ITS CULINARY HISTORY, INDIA HAS BEEN A PLANT-FORWARD NATION, THANKS LARGELY TO ITS AGRARIAN NATURE. THIS IS WHAT SETS IT APART IN ITS APPROACHES TO PLANT-BASED FOOD.

A PLANT FORWARD CUISINE

India’s culinary evolution has been dynamic and can be attributed largely to its climate and topography, resulting in the evolution of a plant-rich diet. Proteins that would otherwise be sourced from animal sources, were drawn from plants in the form of legumes, lentils and

vegetables. Which is why across India, primary meals of even the most meat and seafood-centric cuisines show that vegetables and plant foods dominate the plate. “As an agrarian civilisation, India has always been plant-forward. Unlike the West, where meat, processed or fresh,

dominates the plate, the average Indian meal has less meat and is more plant-based, populated with greens, grains and lentils that make up a larger part of meals” says Sangeeta Khanna, nutrition consultant, recipe and product developer and green living enthusiast.

TRADITIONAL PLANT BASED FOODS

Throughout its existence, Indian cuisine has been localised and seasonal. This meant the diet had a variety of plant foods but before refrigeration it had limited shelf life. And so Indian culinary culture created solutions for food preservation, including a variety of dough-based dumplings and pasta-like dried foods that mimicked vegetables, and dried supplementary foods like papads and badis that supplemented the diet.

Regions with extreme climates evolved specific solutions to address dietary requirements. “In Rajasthani cuisine, besan and dahi are key ingredients for many dishes because of their easy availability” explains Abhilasha Jain of Marwadi Khana.

And so, chickpea flour and curd are used to create a variety of dishes that mimic vegetables. Gatta is chickpea dough, rolled into cylinders, cut, steamed and used in dishes like Gatte ki subzi, Pulav, and Kadhi. While Pithod, is a dish in which chickpea flour batter is set and cut diamond shaped dumplings are used to make dishes like Masale wale sukhe Pithod, Jholwale Pithod, Pithod Ka Raita and gravy-based Pithod. The Dal Dhokli of Gujarat, Varan Phal of Maharashtra and Dhokar Dalna of Bengal belong to the same category of dishes.

The Rajasthani kitchen also used the winter sun to dry supplementary foods. “In olden times, people of Rajasthan had to survive on very little because

of the region’s arid climate, and available resources were used to make and store Mangodi, Papad and similar foods that could be used to make instant subzis and curries when fresh ingredients became scarce,” explains Jain. Papads, familiar as crunchy sides to meals, (were used as a sort of dried pasta sheets), broken up into gravies to make a papad ki subzi. One special Rajasthani dish is the Rabodi or Pola. “A thin batter of Jowar or Makki and Chach (buttermilk) are dried into thin sheets like papad, stored and used to make a gravy when needed.” Papads, in all their staggering variations, are similarly used in many parts of India.

Another fascinating category of

dried creations are dumplings variously known as Badis, Vadis, Wadiyan and more across India. Essentially made of batters of lentil, sometimes lentil and vegetables sun-dried in large quantities, these supplementary foods were the original plant

protein alternative. Small drop-shaped moong and urad dal badis are common across most of India, but there are also numerous regional variations like the Sandhan of Maharashtra, Vadams of the South, Bori of Bengal and Badi from Odisha.

Traditionally made and stored for use in months when fish and meat were proscribed or fresh produce was scarce, these were specifically designed to be cooked into curries.

REGIONAL INNOVATION IN PLANT-BASED FOODS

Over centuries, many Indian cuisines evolved to vegetarianism or specific diets, and developed plant-based alternatives to address nutritional and taste requirements. Khoya, paneer, curd and buttermilk offered dairy-based protein while lentils and vegetables were used to create plant-based solutions to address various needs.

The Jain community is one such. Anchored on a belief system that avoids any harm to living beings, it adheres to strict religiously-motivated diet restrictions. Tubers, root vegetables, bulbs, sprouts, and anything believed to harbour life is prohibited. As a result, Jain cuisine evolved solutions that use bananas to

mimic vegetables that weren’t allowed. Raw banana is used to make cutlets, Kele ki sabzi, Dum ka kela and more. Even popular snacks found a banana alternative with the kele ki pav bhaji, dabeli and more.

And long before it grew to its current star status as vegan meat, unripe jackfruit was popular as a meat alternative in much of North India. One of the most innovative aspects of Indian culinary culture is its repertoire of traditional plant-based dishes that replicate non-vegetarian flavours and textures. Many of which come from the kitchens of the Kayastha community. Traditionally scribes in Mughal courts, Kayasthas were

gourmands and accomplished cooks with a cuisine that was as nuanced as that of their rulers. While many members of the community were vegetarian they wanted to savour the flavours of non-vegetarian dishes. And so, Kayastha cuisine evolved a rich selection of dishes with meat-like textures and flavours. Gourd vegetables, khoya and lentils were used to create vegetarian versions of koftas, such as Kaleji ki Sabzi and Moong dal ke Shammi made with moong dal as a meat substitute. And jackfruit was elevated to a whole new level to make kebabs, biryani and more!

PROTEIN ALTERNATIVES V/S PROTEIN NEEDS

The concept of plant proteins is not new to India. Which is probably why conversations around plant-based foods and plant protein have accelerated in recent years. But, there is a fundamental difference in requirements from this segment when it comes to India.

In the course of her consultation work with international brands, Khanna found that there was an increased dependence, especially on tinned meat products in the West. “There is a clear realisation of the dangers of these products in diets now and a conscious move towards bringing more plant-based foods and meat alternatives into one’s diet in these regions. But while the meat-eating West requires plant-based meat alternatives, to address food supply and environment issues,

India’s requirement is more from the perspective of increasing plant-based protein options,” concludes Khanna.

Over the years, many solutions have come into the market to address protein requirements. Mushrooms were first promoted as vegetarian protein in the nineties. Ruchi Soya Industries Limited (RSIL) introduced Nutrela, soya chunks and mince as a low cost, high protein food product around the same time. Soya chaap became a part of restaurant menus, especially in the North. And most recently soya paneer, a grainy tofu, tried to grab some of the paneer market share.

In India, dietary protein deficiency is the primary area of concern. According to a recent National Sample Survey, India has a declining per capita protein consumption across demographics. Covid-19 notwithstanding, there has been a change in the general approach towards food and diets.

Plant protein solutions are the need of the hour, more so in a time when it is being strongly linked to immunity boosting. The natural contribution that such products make to environmental sustainability is an added happy benefit.



LOOKING FORWARD - PLANT BASED FOODS IN INDIA

AN INCREASING SEGMENT OF INDIAN CONSUMERS, CONSCIOUS OF THEIR EATING HABITS, AND THE ENVIRONMENT ARE SHIFTING TO PLANT BASED DIETS, WHILE COMMENSURATE INNOVATION IS UNDERWAY IN THE SEGMENT ACROSS TRADITIONAL AND EMERGING FORMATS.

CONSCIOUS MOVE TOWARDS MINDFULNESS

Traditional forms of plant-based alternatives have been a part of the Indian culinary repertoire for centuries. And yet, the Indian Food Industry is seeing a lot of innovation in the plant-based foods/meat alternatives segment.

Plant-protein based foods with the added benefit of convenience, then become a major market driver. And a slew of product brands including Unived, Good Dot, Vegeta Gold, Vezlay Foods, Urban Platter and more are innovating to meet these needs of every kind of diner – from the experimentative vegetarian, to the meat-eater-gone-vegetarian or vegan, to the environment or the health-

conscious consumer. The solutions range from plant foods like jackfruit mock meat to plant protein alternatives like imitation salami, hot dogs, chicken drumsticks and even prawns!

One point of concern however, is additives in products created as meat substitutes. “Understanding one’s mock meats is important – where do they come from and what goes into them,” advises Shonali Sabherwal, Macrobiotic Nutritionist, Chef, Instructor, Gut Health Expert and Author. She goes on to explain that being plant-based and dairy-free is simple. Just eat foods that come from plants and not animals. “Sticking to a plant-based diet

keeps the acidic load of one’s food intake low. But, one must also avoid genetically modified and synthetically created food.” she concludes.

“A plant-based diet is not difficult if one has been brought up on a typical Indian diet,” points out Keertida Phadke, plant-based chef and co-founder of Eat with Better, a jackfruit-based products company. “We can turn to our regular pantries for plant-based alternatives. Lentils are already an inherent part of our cuisine. And we don’t need alternatives like soy milk, we can use coconut milk,” she concludes.

PLANT ALTERNATIVES FOR THE HOME KITCHEN

Jackfruit and unripe banana have been traditional plant-based alternatives to meat across regional cuisines of India for centuries and are a part of the plant-based segment today. “Jackfruit is a great plant-based alternative because it is the most natural mock meat available and doesn’t need processing to give it a meaty texture. It is also a versatile fruit that can be cooked in many ways,” says Sairaj Dhond,

Founder and CEO, Wakao Foods.

These product innovations have cut down the prep and cooking time of jackfruit from two hours to 10 minutes. Additionally they have boosted livelihoods for jackfruit farmers, and the agricultural sector with the sustainable value they create. “I believe the Indian audience is receptive to food products like jackfruit for two reasons besides

the convenience of an easy-to-use version,” observes Phadke. “First, when you see international chefs talk about ingredients that you may have so far dismissed as easily available, you tend to relook at its importance. Secondly, when scientific literature begins to validate age-old wisdom, marketing it in a way that it talks to the educated Indian, there is an increase in demand.” “When nutritionist

Rujuta Diwekar mentioned jackfruit as a superfood in her book, more people saw its benefits in controlling diabetes, managing weight and blood pressure,” she concludes.

Siddharth Ramasubramanian, Founder & CEO, Hello Tempayy (Vegolution India) is concerned about the deficiency of protein

in the Indian diet. “The drive towards a plant-based diet in the West is more from a reduction of meat consumption perspective and the need for an alternative form of protein. In India, the requirement is for a quality protein source.” Hello Tempayy products check off many boxes. “Our marinated and natural tempeh offerings are made

from fermented soybean and deliver 19 grams of protein and 6.8 grams of fat per 100 grams, compared to 15 grams protein and 22 gms fat from paneer, the most commonly used vegetarian protein ingredient.”

PLANT FORWARD RESTAURANT DINING

Plant-based menus in restaurants, perhaps slowed down by the pandemic, were a trend waiting to play out. Chefs and restaurants have been busy learning and innovating and a slew of establishments showcasing fresh and innovative vegan flavours and textures are opening up across the country. And an increasing number of diners are seeking them out for meat experiences that may be missing, or to add variety to their dining out occasions.

In Mumbai restaurants like Rare Earth Organic Cafe, Imagine Cafe, Earth Cafe, Earthlings Cafe, Candy and Green, Farmers’ Café are serving up everything from vegan hummus and pizza, vegan panzanella omelettes, tofu burgers, macaroni with vegan cheese and mock meats like Turkish kebab wraps, vegan meatballs, mock meat nuggets, burgers and mutton.

Sadak Chaap is a chain of restaurants launched by Sannat and Palak Ahuja in Mumbai. They have elevated soya chaap from a fringe dish on erstwhile North Indian menus to their core ingredient. “I think having a plant-based alternative for every meat dish on the menu will be the future,” says Palak. The aim is to offer vegetarians

an experience of the full gamut of meat preparations they might not have been able to try before using versatile chaap. “People are increasingly open to trying out plant-based alternatives. They may be vegetarian, vegan or dairy-free, but they are curious to see how a meat marination works on a plant alternative.”

In Bengaluru, establishments like Carrots, Go Native Cafe, JustBe Cafe, The Yogisthaan Cafe, Sante Spa Cuisine and The Good Grain are offering up a gamut of flavours. Today even non-vegetarians can dine happily at plant forward restaurants like The Pet People Cafe in Bengaluru, that serve dishes like Mock Meat Burgers, Tempeh Tacos and pancakes with plant-based butters. The menus are well curated and the dishes well prepared, presented and delicious.

Abdul Azeez, Owner, Vegan Vogue in Bengaluru concurs that increasing numbers of diners are looking for plant-based alternatives. “I see an upwards rise in the trend, especially with global cuisines; American food has such an impact in terms of pop culture significance, and plant-based meat alternatives gave Indian stakeholders an opportunity to recreate burgers,

steaks and other popular dishes like the American Chilli we serve, for non-meat eaters, to try. Its reconstruction to suit a vegan palate does little to alter its originality.”

“During the early days of the trend, plant-forward restaurants offered limited options for diners, comments Chef Abhijit Saha, Founder-MD of Ace Hospitality & Consulting who designed the menu at The Pet People Cafe in Bengaluru. “Today, knowledge and understanding of plant-forward cuisine has increased among both chefs and diners. Research and innovation has led to the development of unique ingredients like plant-based meat, milk and more and given chefs the opportunity to create dishes that were not possible even a few years ago. Another exciting aspect are the possibilities superfood ingredients, like hemp hearts and moringa powder, which are healthy and therapeutic, offer,” he concludes.

With so much innovation in the segment, from convenience products for in-home consumption to new benchmarks in the restaurant industry, the plant-based foods movement is set to boom in years to come.



Picture courtesy: **Hello Tempayy**



Picture courtesy: **Wakao Foods**

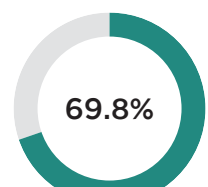




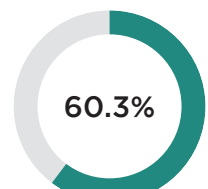
FOOD MEDIA CHANNELS



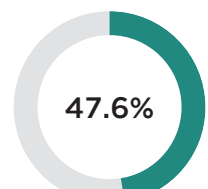
FOOD TRAVEL



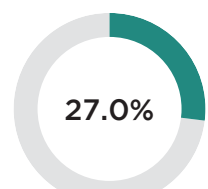
Instagram & Instagram LIVE



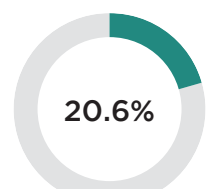
Food videos



Digital food websites & cooking apps



Food television shows



Print media & cookbooks

Food media has seen unbelievable evolution in the past year. We have seen social media become a form of connection, communication and expression, and especially for the use of food conversation, in a bigger way than it has ever been, over the last two years. Existing social media platforms have been resurrected and repurposed, new media platforms have come into existence. Content creators and users alike have spent significant time and energy both creating and consuming content across segments of radio, TV, web streaming platforms. Food content is being consumed like never before via food blogs, vlogs, Instagram pages, podcasts and even niche threads of

conversation around food practices and memories on Clubhouse. Our panel of experts concurs that research and documentation of cuisine and culinary practices will stay an area of interest in 2022. Content creators will connect with and reach new audiences everyday. **Instagram and Instagram Live** will continue to be the most popular channel for food content while the undeniable impact of visual mediums means that **food videos** will also continue to be devoured well into 2022. And with considerable fatigue from passive content consumption, we are also going to seek more interactive content through **digital food websites and cooking apps**.

Kunal Vijayakar



The Indian audience has always enjoyed bingeing on food video content, which is why the TV shows we created even 10-15 years ago did so well! But today, content creation has become so democratised that anyone who is interested in food can be a broadcaster. In 2022, I think we'll see a lot of instructional content, like recipe videos. But also pure indulgent content, that you can just watch and salivate over. Especially content around local food and travel that creates a vicarious experience for the viewer.

Instagram works really well to capture the attention of new audiences. But I definitely see an evolution towards platforms that allow content creators to then hold their audience attention for longer periods of time. This could be through websites, e-publications and self-publishing platforms, like Tastemade India, Goya Journal, Medium or subscription based newsletters, where audiences can go to find detailed curated content around their specific interests in food. People have got used to having their own voice and creating their own space and a platform which enables that is where the action will be.

Jayatri Biswas



While YouTube has been a long-preferred source, I think recipe apps will become a go-to for budding home cooks who wish to broaden their culinary skills. Many chefs and instructors are moving towards having their own apps that one can download with a one-time payment and unlimited access to their recipes.



Kalyan Karmakar

The pandemic cut travel out almost completely. For the last two years there has been a frustrating yo-yoing between total travel bans and surges in travel during periods of ease. In all this consumers have been chalking up bucket lists of places to visit and foods to taste when things improve. to explore next. And almost ninety percent of our panel anticipates an undeniable hunger for **travel experiences centred around culinary culture and cuisine**. The hospitality and tourism industries are greasing up to deliver on these

desires. Many businesses have opened themselves up to patrons through **food and beverage tours**, allowing travellers to deep dive into processes and expertise behind local foods, beverages and favourite indulgences as well as opportunities to taste. Travellers are also becoming more introspective, this has already begun to manifest with greater exploration of destinations within the country. But our panel also sees this need to get out and explore resulting in a lot more **city food walks**, as we seek novel experiences closer to home.

Lately, when people travel, or relocate while working from home, they are seeking new experiences to immerse in local culture. And local food is a great way to do it! Travellers will seek this experience through organised city food walks, or local friends and hosts to show them around while tourism companies will cater to this growing interest in food travel with unusual offerings. That said, I see it being more popular among independent travellers rather than tour groups, I think we'll see it reflecting a lot more in travel media, social media, lifestyle blogs, in-flight magazines, and the like as well.

Virkein Dhar

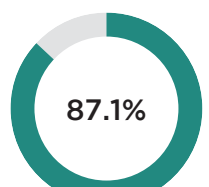


Experience behind-the-scenes of a vineyard or distillery is an exciting activity during travel, and it also gives people a chance to learn something new. For businesses, it's an opportunity to showcase what makes them stand out, build trust with consumers, and also create an additional source of revenue. I think this is a trend that's certainly set to grow, with values such as transparency, traceability and trust becoming more important for consumers.

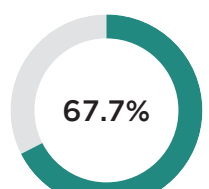
People now want to break their chains and travel, yearning to discover places through their people, culture and food. And post-lockdown, we are developing a renewed interest in our own cities, so city walks are emerging as the best route to uncover hidden stories in the gullies.



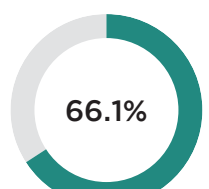
Supriya Arun



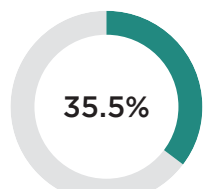
Travel to experience culinary culture and cuisine



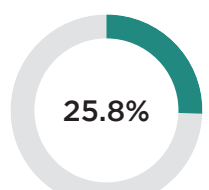
Food & Beverage tours



City food walks



Culinary Residency



Travel for field research & exploration in food



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AGAINST COVID-19** VIRUS



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*Each refill sachet weighs 9g.

Godrej

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THE FUTURE OF LIFESTYLE

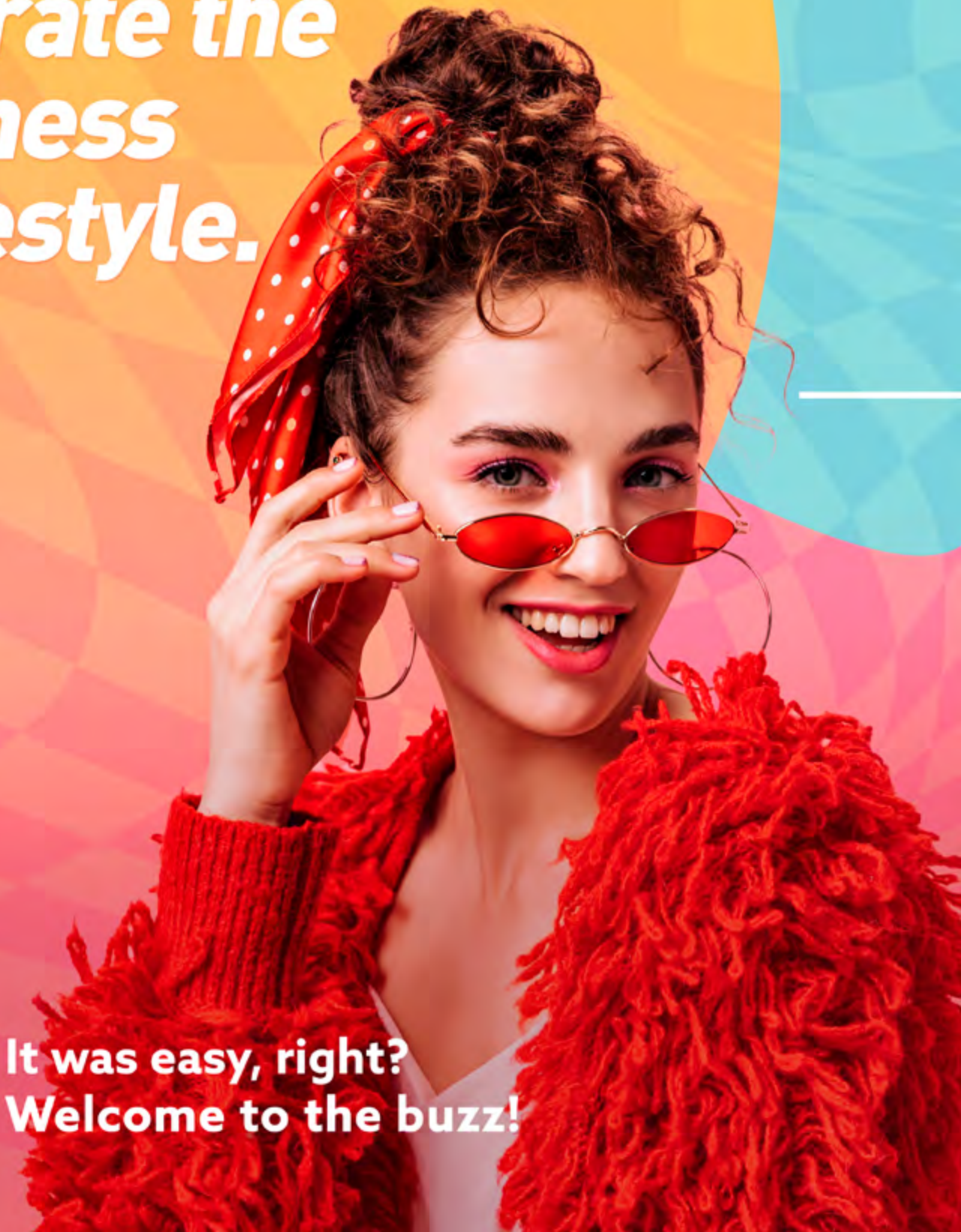
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thrilling ride of
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that is lifestyle.

*Scan to
follow and
celebrate the
Goodness
of Lifestyle.*

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It was easy, right?
Welcome to the buzz!



FERMENTATION IN INDIA

Fermentation, khameer, aantho, huli barisu, puli bape... India has a rich culture of fermentation (pun fully intended!) We see it across dairy-based ferments from curd and various cheeses, to grain and lentil based batters and condiments, yeast based breads, lacto fermented pickles of fruits, vegetables and fresh produce, local beverages, liquors, vinegars and condiments. And today, with deeper research and understanding of the impact of the gut microbiome on all facets of our health and wellbeing there is a newfound excitement around the practice of fermentation in both home and professional kitchens.

To round off this section on emerging conversations, we examine the journey that fermentation has taken in India, traversing both traditional practices and growing exploration into global methods. Start by taking a trip around the visual **Map of Indian Ferments** (a creative visualisation of a selection of fermented beverages, foods, pickles and preserves of India, and in no way comprehensive, as it would be virtually impossible to document the vast spectrum of all fermented foods and techniques present in this country on one page, so this visual does not aim to be a comprehensive representation of the same.) Then, **Look Back** at the vast expanse of traditional fermentation practices historically used in our country. And finally, **Look Forward** to what's... well fermenting in the days to come!

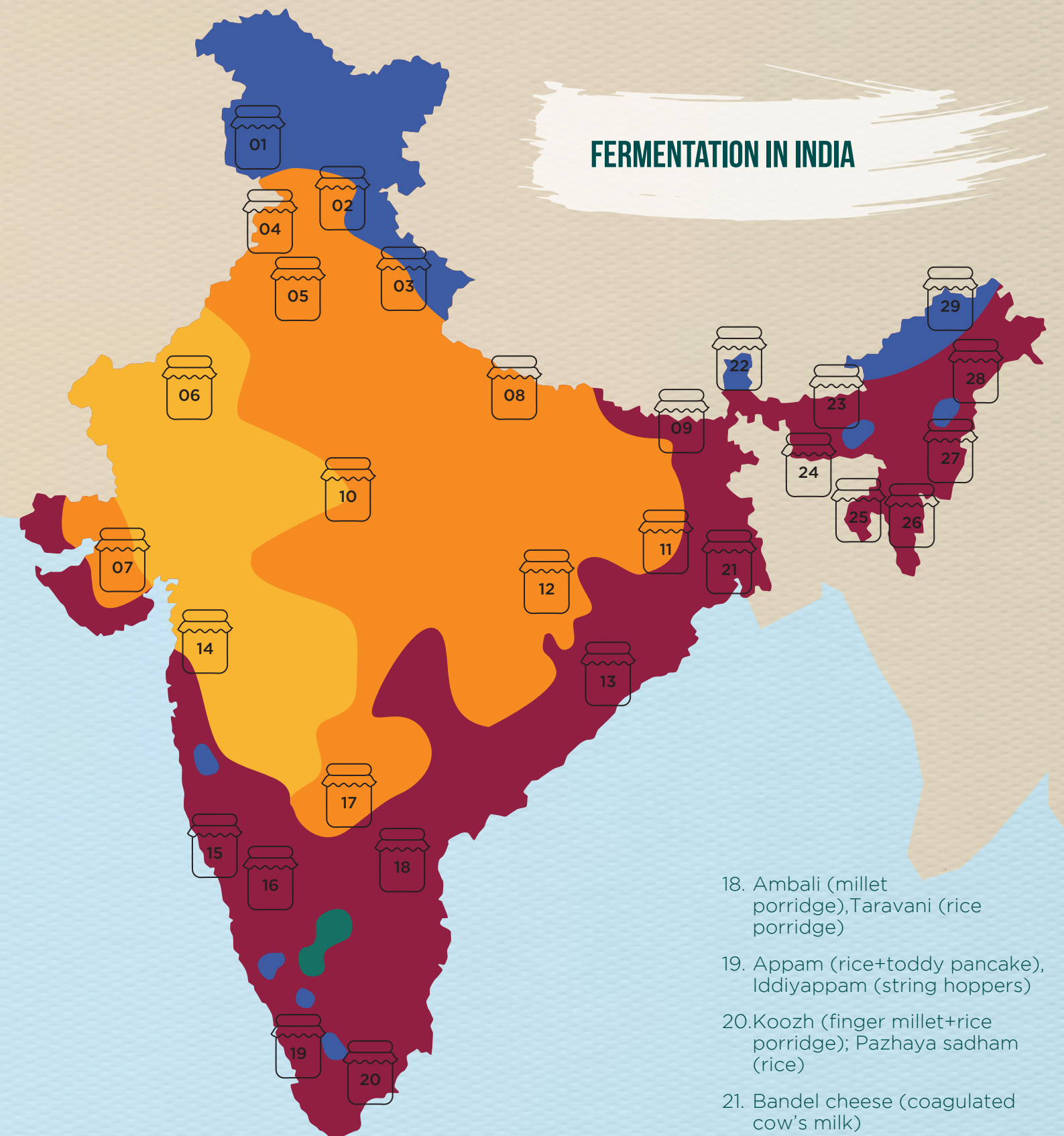


Different Climate zones of India

Hot & Dry	Cold
Hot & Humid	Moderate
Composite	

Disclaimer - This is a creative visualisation of select ferments in India for illustrative purposes and is in now way a comprehensive representation of the topic

FERMENTATION IN INDIA



- Phuh (colostrum cheese), Yaji (steamed dumplings)
- Dangal bari (spiced lentil mixture), Bedvin roti (flour+lentil+walnut bread)
- Jamma (goat meat sausage), Keem (barley flour curry)
- Sez (rice), Bhallae (black gram fritters)
- Doli ki roti (sourdough bread), Kanji (carrot+beet beverage)
- Khatti Raabdi (millet based dessert), Chakka (whey from curd)
- Dhokla (bengal gram+rice), Handvo (lentil cake)
- Jalebi (fried flour batter), Lassi (buttermilk)
- Hadia (rice), Baskarel (bamboo shoot)
- Pej (rice), Rabdi (maize porridge)
- Dhuska (rice+lentil fritter)
- Dehori (rice-curd mixture), Bijori (sun dried lentil disc)
- Pitha (grain dessert), Chenna poda (chenna cheesecake)
- Kurdai (sundried wheat cracker), Sukhi bombil (dry fish)
- Sannas (rice cake), Chepnim tor (stuffed raw mango pickle)
- Kachampulli (garcinia vinegar), Baimbale (bamboo shoot)
- Idli (steamed rice cakes), Dosa (rice pancakes)
- Ambali (millet porridge), Taravani (rice porridge)
- Appam (rice+toddy pancake), Iddiyappam (string hoppers)
- Koozh (finger millet+rice porridge); Pazhaya sadham (rice)
- Bandel cheese (coagulated cow's milk)
- Gundruk (leafy vegetable), Maseura (black lentil soup)
- Namsing (fish), Kinema (soybean)
- Tungrymbai (soybean paste), Tungtap (fish)
- Sheedal (fish without salt), Lona ilish (salted hilsa)
- Bekang-um (sticky soybean paste)
- Hawaijar (soybean), Soibum (bamboo shoot)
- Akhonii (sticky soybean paste), Jang kap (buffalo skin)
- Chhurpi (yak milk), Pikey Pila (pork meat pickle)

FERMENTED FOODS IN INDIA - LOOKING BACK

ETHNIC INDIAN FERMENTED FOODS HAVE BEEN A SIGNIFICANT PART OF TRADITIONAL INDIAN CULINARY CULTURE FOR CENTURIES.

A TIMELESS CULINARY PRACTICE

India is home to one of the oldest culinary cultures in the world. It's vast diversity of foodways includes ethnic fermented foods. In fact, fermentation is so prevalent that every Indian eats local products of fermentation daily at every meal, in the form of something as simple as a daily serving of dahi (curd) or some variety of fermented pickle or bread.

Fermentation is a natural process of food preservation as old as time and has been used since before the advent of canning, preservatives, refrigeration and irradiation. "Fermentation existed before humans evolved. We tamed the process of fermentation after we began the cultivation of food," points out Sangeeta Khanna, nutrition consultant, recipe and product

developer and green living enthusiast who has been actively conducting virtual classes on lacto-fermentation. And this process has been harnessed and nurtured in India for centuries.

WISDOM ACQUIRED OVER MILLENNIA

The Indian repertoire of fermented foods is so diverse, it is impossible to fathom. An anaerobic process, in which microorganisms, such as yeast and bacteria break down the carbohydrates present in foods into organic acid, alcohol, and gases, fermentation has two broad categories. Yeast-based fermentation, in which sugar is broken down into alcohol. And lactic acid bacteria (LAB) based fermentation, in which Lactobacillus bacteria feed on sugars present in fruit and vegetables. In the right conditions, these bacteria thrive, producing lactic acid, which

pickles and preserves food while also transforming textures and flavours, and enhancing nutrition.

Wild fermentation, inoculum based fermentation, smoking, drying, salting, and alcohol production, all evolved to preserve foods.

"Fermentation is an area of evolutionary wisdom acquired over millennia and refined according to the climate and geography," observes Khanna. Fermentation across the Indian subcontinent occurs in a variety of forms across its various microclimatic regions based on

traditional wisdom and native skills of people, honed into practices through centuries of trial and error. And the foods that are fermented depend on geographic location, locally available plants and crops, and the microbial communities that thrive in a particular environment. Broadly however, plant-based fermented foods in India run the gamut from fermented cereal, legume, soybean, vegetable and seed-based foods, and animal-based fermented foods include dairy-based products, and fermented/ sun-dried/ smoked fish and meat products.

FERMENTS ACROSS INDIA

With its unique geography, rich biodiversity of plant and animal species, and a climate that is extremely prone to microbiological intervention, food fermentation is integral to Indian culinary cultures even today but is localised. So much so, that many Indian ferments have yet to be discovered within India itself let alone the world at large. Evidence of this comes from the diversity of nomenclature, from Khameer in the North, Aantho in Gujarati, Khatta in Hindi, Ambwane in Marathi, Nodhithal in Tamil, Puliyatam/ Puliya pettadam in Telugu, to Huli baarisu in Kannada. While the scape of fermentation in India is diverse, there are distinct hotspots, where fermentation has been harnessed to preserve excess produce, these include tropical West, South, East, and North-East India.

In cold and arid regions of the North, there is a vibrant yeast based bread culture but fermentation is seasonal. Mustard-based ferments grace the plate in winters. "Pickles called pani ka achar (watery pickles), or rai-paani ka achar (mustard water pickles) are very popular in Uttar Pradesh. We pickle a lot of vegetables this way," observes Khanna. "They are much loved because the seasonal produce of winter responds beautifully to this method of pickling and the pickles go well with traditional winter meals." Shaljam, gajar and gobhi (turnip, carrots and cauliflower) achar are made in various ways around the country. Another popular mustard-activated ferment, the kaale gajar ki kanji, is put down to ferment in time for Holi across the North.

Heading down West, curd, buttermilk, grain and pulse

based ferments become popular. "Maharashtra, like the rest of tropical India, has a distinctive fermentation culture," shares author and culinary consultant Sae Koranne Khandekar. In the spring and summer, when temperatures and humidity can be high, naturally fermented foods provide nourishment and help maintain the body's temperature. "Ambils are a particularly delicious and cooling category of fermented millet drinks consumed as breakfast or a midmorning drink. And ambolis are naturally fermented dosa-like pancakes." The plain amboli version is similar to the uttapam from the South, but there is a unique mildly sweetened one, flavoured with jaggery, fresh root turmeric, that has coconut in the batter, which helps it ferment beautifully overnight. Similar breads are present across the West and South of India.

South India is best known for its fermented lentil and/or rice batter based idlis and dosas, but another interesting aspect are its curd based ferments. Curd and buttermilk, which are staples across the country, turn sour over time, and make an effective preservative that is used to soak and dry a number of vegetables, with the addition of salt and mustard or other spices. In Tamil Nadu they are called Vathals but similar food supplements are preserved all over the region.

Heading East, the climate is particularly conducive to fermentation. Odisha is particularly rich in fermented foods. "Most fermentation techniques are primordial and largely of tribal origin and in the tribal regions, their consumption is both seasonal and ritualistic in nature," shares Sweta Biswal, culinary chronicler, food writer

and curated meals creator. Tribal dishes include mandia pej, handia, mahuli, and tadi. "However, we have a prevalence of fermented foods across Odisha throughout the year," she continues. "Popular dishes include pakhala (fermented rice gruel), ragi based mandia pej. The hotter months have more fermented foods like tanka torani and ghola dahi (buttermilk) because they become something of a necessity. But even in the colder months 'slower' fermentation time is leveraged to add to the flavour/enhance the nutritional profile of certain foods like pithas, dahi chenna, usna chakuli, and torani kanji." Karadi (bamboo shoot) and hendua (dried bamboo shoot) are favoured in western Odisha, with its proximity to neighbouring states in the North East of India.

Bamboo shoot is in fact an important fermented food across the North East, where fermentation is intrinsic to the culinary culture. "Fermentation is how we preserve our meats, vegetables, fish, just about everything!" exclaims Assamese food chronicler Kashmiri Nath. "At one time, fermented foods were our salvation during lean times or natural calamities like floods. No surprise then that the region is rich in fermented foods." All sorts of greens, vegetables, dairy, legumes, meat and fish are dried, smoked and fermented. "In Assam, even small paddy field fish are sun dried, pounded with colocasia leaves and left to ferment in a bamboo hollow, near the cooking fire. When needed a spoonful or two are pulled out, mashed with fresh chillies, or onion and salt and served with rice. It is a frugal delicious meal," shares Assamese Home Chef Gitika Saikia.

RICH EXPLORATIONS

"Fermentation is a Pandora's Box! Be it the Khameer, Kanji, Dosa, Gundruk which is Nepali but has travelled to Ladakh, and even UP, or Naga Akhuni, its everywhere in India in some small way," exclaims Prateek Sadhu, Chef and Co-Founder of Masque Restaurant. "But, for me it's very important to understand

the technique of fermentation from different parts and use it in the way we want at Masque," he concludes.

The significance of fermented foods in Indian Cuisine is a distinct vibrant segment that needs deeper study. Breads, beverages and vinegars are

specific categories beyond plant and animal based ferments with many more stories to tell. Serious studies and explorations are underway into these aspects and there will be a lot of innovation in the Indian fermentation space in 2022 and beyond.



INDIAN FERMENTATION: LOOKING FORWARD

INDIA HAS A LONG AND RICH HISTORY OF FERMENTATION. BUT INDIAN FERMENTS HAVE LARGELY BEEN LIMITED TO HOME KITCHENS. HOWEVER, IN THE LAST FEW YEARS, WE HAVE SEEN AN EXPLOSIVE INTEREST IN FERMENTATION AMONGST A NEW WAVE OF HOME ENTHUSIASTS AND THE FOOD INDUSTRY. WHAT CHANGED?

A REEMERGENCE

“In 2016 is when I gradually started hearing more and more about fermentation in conversations, and by 2018 stuff was popping up all over the place! From there on it started to become more visible in the mainstream media and conversation,” says fermenter Payal Shah, who has been fermenting for most of her adult life, years before she set up her wildly successful educational social media page, Kobo Fermentary.

One of the major triggers for this shift, according to Chef Prateek Sadhu, is because some globally renowned chefs focused their energies on fermentation and its potential. “About 5-6 years back, restaurants like Noma and Mugatriz began spearheading this campaign around fermentation. These techniques had always existed, but they began to explore them with deeper interest, applying traditional methods and cultures from around the world to their

local ingredients to create new flavours,” he reflects. “These were personalities that the culinary world looked to for inspiration.” And as people caught the bug, it triggered what grew into a global trend! “Chefs around the world, including in India, recognised that fermentation practices have always been all around us, it was just a matter of waking up to the possibilities,” notes Sadhu.

FERMENTATION AS TECHNOLOGY

In January 2020 Chef Sadhu launched Masque Lab, a culinary research lab, with the objective of digging deeper into flavour development. Here, his team conducts extensive experiments on ingredients with techniques such as ageing, brining, pickling, fermentation and more. One example he shares is of their study of dosa batters. “We dissected the dosa batter fermentation process, playing with salt percentages, ferment

times, and other variables.” All this was not to make the perfect dosa - that was not the objective. Rather, it was to break down the traditional technique, understand its potential, and then use it to manipulate and transform other ingredients. “For me, it’s very important to understand fermentation techniques from different parts of the country and then use them in our own context at Masque, with our own unique voice,” he concludes.

Shah observes that chefs and others who work with food commercially approach fermentation very differently from home fermenters. “They are using fermentation as a type of technology, to maximise flavour and nutrition, improve waste management, and extend the life of produce in their daily operations. It’s challenging but the rewards are huge!”

FERMENTATION AT HOME

Meanwhile, at home, fermentation has been a source of learning, growth and joy. “Fermentation teaches you patience, how to deal with failure, how to share,” reflects Shah. Home fermenters are willing to take their time with it, enjoying the journey of discovery, she observes, as they experiment with fizzy drinks like kombucha,

tepache, water kefir and fruit ferments, with pickling and lacto-fermentation. “And the pandemic gave it a leg up,” she adds. “People wanted interesting projects that would take them away from the madness. I saw interest in home fermentation grow by nearly 200%!”

Some people get hooked, finding

a lifelong hobby in the practice. Others take away valuable lessons in better eating. She offers an example, “people who have fermented are able to waste less food, having learnt to trust one’s senses of smell and taste rather than printed best before dates alone.” And others are interested from a nutrition and health perspective.

THE GUT MICROBIOME

In the last few years, there has been new and exciting research into the gut microbiome - the complex diversity of bacteria and microbes that live in our digestive systems.

It has long been known that our gut bacteria aid in digestion and absorption of nutrition, but new research is shedding light on the impact that these microbes have on several other aspects of our health. “These days we’re talking about a gut-brain axis (the two-way biochemical signalling that takes place between the gastrointestinal tract and the central nervous system) and research is saying

that the bacteria actually help with neurological health, even things like Alzheimer’s!” says Dr. Poorvi Bhat, nutritionist and naturopathic physician. And she concurs that this spurt of research has increased our interest in probiotic foods.

“Diet definitely helps your gut microbiome. High fibre plant foods like fruits, vegetables are great,” she says, “but when it comes to the role of fermented foods on enhancing our gut bacteria - the jury is still out.” She goes on to explain that while some schools of thought like Ayurveda advise against sour foods, others like

Naturopathy are encouraging the consumption of pre-, and probiotic rich foods for gut health. But from a Western evidence-based scientific perspective, there is limited empirical data. “Small studies have been done, which show that they may play a positive role, but there is still a lot of research to be done.”

“When it comes to the gut microbiome I think we need a more nuanced approach. But I think this interest in fermentation is definitely growing,” she concludes.

HERE TO STAY

From 2016-18, when the major questions around fermentation in contemporary conversations

were as nascent as ‘What is kombucha?’ or ‘What are probiotics?’ today, we are seeing a far broader exploration of these processes. People are finding their own ways to engage with it. Chefs in restaurants are tinkering with the science of this ancient technology, using it in modern ways, to solve modern challenges. Home fermenters are playing with the process of making pickles, hot sauces, fermented drinks, vinegar and more in their own kitchens, enjoying the slowness of nurturing cultures - even naming their sourdough starters!

People are even setting up small businesses to fill gaps with slightly more complex koji-based

ferments like miso, shoyu and more which home cooks might not have the space, equipment or skill to make, but still enjoy consuming.

“Even beyond food, if you take anything - sustainability, material science, history, human evolution, philosophy - you name it, and look at it through the lens of fermentation you’ll get so many new answers.” muses Shah. “There is so much research being

done, so many different rabbit holes you can go down, the learning is endless!”

All this points to one thing in certain: our foray into fermentation is growing, and it is only going to get more interesting in the time to come!



OUR PANEL OF EXPERTS

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Abdul Azeez Owner - Vegan Vogue	Chef Ananya Banerjee Author Restaurant consultant YouTuber	Aseem Hattangadi Home Chef & Baker - Bread Zeppelin	Elton Fernandes Founder - El The Cook
Chef Abhijit Saha Restaurateur & F&B Consultant	Aniket Prashant Bhawe Sales Professional- Mumbai	Chef Ashish Bhasin Director F&B Service & Culinary - The Leela Ambience Gurugram Hotel & Residences	Garima Tiwari Regional Food Chronicler Blogger - @Noneeecoos
Chef Abhilasha Chandak Celebrity Chef & Food Consultant	Anindya Sundar Basu Food Writer Founder & Chief Visual Artist - Pikturenama Studios	Ashish D' Abreo Co-Founder - Maverick & Farmer Coffee	Geetu Mohnani Barista Trainer & Coffee Consultant - ABC by Geetu
Abhilasha Jain Home Chef - Marwadi Khana	Anisha Rachel Oommen Co-founder - Goya Media	Aslam Gafoor General Manager, Luxury Dining - Dineout	Chef Girish Nayak Chief Mithaiwala - Bombay Sweet Shop
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Uttam & Radhica
Muthappa
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Pork, BMD, Rosemary Et
Al

Vaidya Shikha Prakash
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Mathe Madhavan**
Co-founders - Zishta

Chef Varun Inamdar
Two National Awards
Winner & Chef

Chef Vicky Ratnani
Celebrity Chef | Founder
- Speak Burgers

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Home Chef - The
Himalayan Rasoiya

Zeba Kohli
Author | Chocolatier |
Entrepreneur | TedX
speaker | TV show host



EDITORIAL TEAM

A project like The Godrej Food Trends Report is not possible without an army! This study of trends is a continuous process, approached from the lens of past, present and future. Each year, the report adapts its scope to grow, spreading its footprint further, wider and deeper, reaching out to thought leaders across verticals in the Indian food industry, to collect quantitative and qualitative inputs through a survey questionnaire. These are then collated, analyzed and distilled to forecast trends that will prevail in the forthcoming year.

And each year I have the privilege of assembling and working with a stellar team of chroniclers with whom I embark upon an adventure for the next few months, connecting with the industry, mapping all the emergent, existing and established trend curves, having invigorating conversations and shaping the next edition.

This year I had these amazing people on my team. Thank you for another amazing edition of GFTR!

Rushina Munshaw-Ghildiyal
Survey Designer and Editor in Chief



Rushina Munshaw-Ghildiyal
Curator & Editor in Chief



Shivani Unakar
Sub-editor



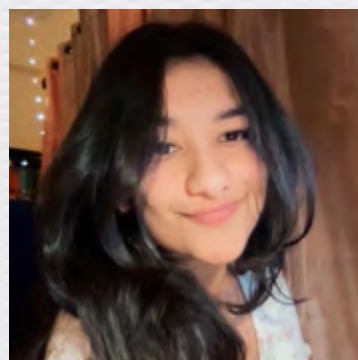
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Sanskriti Madhwal
Editorial Intern

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Anindya Sunder Basu
Independent Food Writer



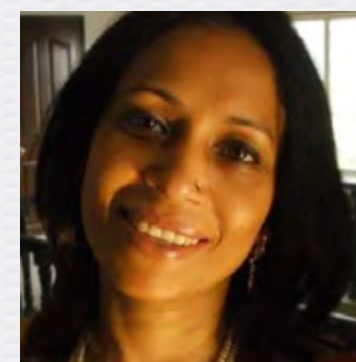
Anindya has contributed the regional overview of East India. He has also been the subject matter expert for the Bengal region.

Anubhuti Krishna
Independent food writer, consultant and chronicler



Anubhuti has contributed her insights on the regional overview of North and Central India and worked on the Traditional Cookware deep dive in the Food Studies section.

Kashmiri Nath
Food Consultant and Assamese Food Chronicler



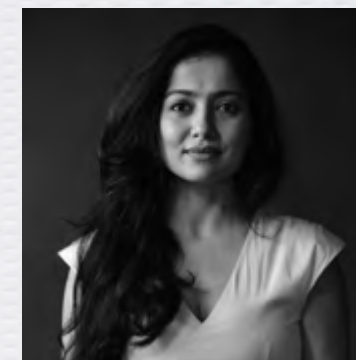
Kashmiri has contributed her insights on the regional overview of North East India. She has also been the subject matter expert on the North East.

Priyadarshini Chatterjee
Independent Food and Culture Writer



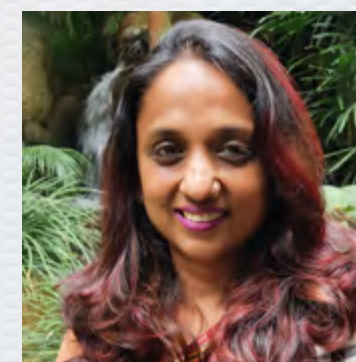
Priyadarshini worked on the Indian Mithai deep dive in the Desserts section.

Roshni Bajaj Sanghvi
Independent food and travel writer; Contributing Editor - Vogue India



Roshni has contributed her insights on the regional overview of West India. She has also been a subject matter expert on global trends for the report.

Ruth D'Souza Prabhu
Independent Journalist and Food Writer



Ruth has contributed her insights on the regional overview of South India and worked on the Plant Protein deep dive in the Emerging Conversations section.

Shivani Unakar
Food researcher and writer



Shivani has worked on the Coffee deep dive in the Beverage section and been a subject matter expert for many aspects of the report.

Anindya Sunder Basu and Madhushree Basu Roy
Anindya is Founder & Chief Visual Artist, Pikturenama Studios

Madhushree is Art Director Pikturenama Studios



Pikturenama Styled and shot the visual spread for the Desi Bartans deep dive in the Food Studies section.

**The culinary deep dives in other sections have been collaborative works by the editorial team.*



THE FUTURE
OF FOOD



Survey design

Rushina Munshaw-Ghildiyal



Research and data analysis

A Perfect Bite Consulting LLP

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