

2. **Good morning.** The idea behind my presentation is that most food trends -- whether in restaurants or in consumer packaged goods -- somehow start in American and work their way around the world in an eastward direction ... so you get them in London before continental Europe. Our major trend topics today are: How technology is changing tastes, distribution, and a ferocious battle for market share. Then we'll look at fast-casual dining formats, which haven't made much impact here ... yet. After that ... an exploration of how tastes and textures are changing breakfast in the US and what it means for menus all day long. You need to know about "bowls" ... and I'll explain shortly. Vegetables are shoving meat to the side of the plate ... or off it entirely. And through all of these points for today, we'll find a string of strong -- call them fierce -- flavors." It all adds up to all the world's cuisines sharing the very same plate.

3. This leads is into the issue of technology.

4. Google Glass was discontinued ... at least for a while. Four our industry, it suggested that when you enter a restaurant, your face would flash onto Google Glass and the host would know your name, when you were last there, what your favorite drink was and whether you're a VIP. It would let waiters find you in a crowded bar, it wouldn't matter that you lost your coat-check ... and Google would add everything about your culinary life to its valuable database ... including whether you were at a restaurant with someone you shouldn't have been. We are told that Apple is now working on a similar product.

5. Fast-forward and one New York restaurant is about to deploy the Apple Watch for similar tasks. With a guest list on the watch, the hostess can tell everything about your party, and convey information to the floor about when and where you're to be seated, who the host is, and his dining habits at that restaurant ... or any other restaurants that might be part of a group. It is a two-way street, just as with Uber ... so guests, if they wish, can provide real-time feedback about food and service for immediate reaction by the restaurant.

6. Here's an example of how technology controls behavior.

7. 3-D printing is becoming a reality in the US and ... I understand here as well. Tinkerers have gone beyond odd-shaped desserts and are now doing pizzas, meat pies, scones,. Barilla has introduced a 3D pasta machine using just flour and water to make shapes that are impossible by hand. This is critical because

8. ... given sharply rising costs of labor, 3-D printing of food ... and the prospect of food made and served by robots ... we'll see big changes in ways certain foods are formulated and how they are distributed. So you may be selling ... or using ... various pastes, concentrates and powders to formulate things like this 3D printed carrot.

9. Now technology hasn't brought us to the sorry state of affairs ... but ...

10. ... it is bringing food to where the people are. So ... increasing numbers of people will push buttons on their smartphones ... or speak directly into their new electronic valets ...and order dinner *maybe* from a restaurant or maybe from Marks & Spencer or Waitrose ... and dining at home tonight.

11. More on delivery. Our industry is facing internet-only newcomers that we call "Restaurants without Seats". These are commercial kitchens staffed by commercial cooks ... with no front-of-the-house whatsoever ... and whose sole purpose is to prepare and deliver food to order. One company in New York that has eight different "phantom restaurants" on the web, each with its own specialty ... and each reachable only on your smartphone. These eight restaurants without seats deliver around town from just two invisible kitchens. Look for more of this to happen.

12. Another techno threat to restaurants: App developers creating companies that will connect local diners or tourists . . . with cooks who are preparing group meals in their home dining rooms. They also connecting home cooks to people who want meals delivered ... but not from restaurants. So these are "Seats without Restaurants" and they can cause great shits in where people eat.

13. AirBnB claims that its users spent \$4.5 billion dollars on food when away from home. They're working on apps that indentify restaurants where you are traveling, make on-line reservations, connect you to an AirBnB host who wants to serve you a home-cooked dinner ... and someday offer end-to-end travel service.

14. And here's what Google will be able to do.

15. It's clear to us ... with so many players in this techno field, that these companies will gobble each other up ... and when the dust settles, three or four giant firms will have the capability of controlling who our customers are ... how they receive reviews of restaurants (or supermarkets) ... how people get to us, how they order order and pay for their meals ... and most of all ...how these techno giants use all this information for their own purposes. While we're left doing the hard work of running a restaurant while they a piece of the action for each of their middleman services.

16. Speaking as we were about Google and about 3D food printing ... you should know that Google has two test restaurants serving fermented, freeze-dried and powdered vegetables, vegetable broths and spiralized vegetable noodles. Let us assume that Google represents the challenging edge of a new sort of wedge.

17. Next subject: Fast-casual dining formats ... an American phenomenon that has popped up ... but hasn't yet invaded England. If you've seen Chipotle, you'll know what I mean. If not, let me explain. Fast food customers get their products precooked and prepackagd ... and often tasting pre-digested ...

18. ... but fast-casual customers see real food, fresh food, eye-appealing food directly in front of them. Fast food customers have

few or no choices ... but fast-casual formats put customers in control of their meals' components.

19. So fast-casual food appears healthier, more appealing, offers choices, lets customers interact with servers.

20. You can see the relative growth curve here.

21. Now there is a stampede of new entries hoping to be The Next Big Thing ... bidding up real estate costs and perhaps diluting the fast-cas experience. Here are some recent startups.

22. This is a fast-cas Greek startup ...

23. ... a sushi startup

24. ... and even a jivey American-ized Indian startup. Note the references to burritos, quesadillas and hamburgers.

25. Next subject is the upheaval in what constitutes breakfast in America. After McDonald's ... reluctantly, I might add ... initiated all-day breakfast ... restaurants began upping their game.

26. They're not simply developing new items ... but they are changing the very nature of texture at breakfast. When we think of traditional breakfasts ... comforting items like soft scrambled eggs and custardy french toast come to mind.

27. The new breakfasts are aggressive. Hotter, spicier, noisier on the palate and in their ear. This breakfast sandwich has a runny egg

... crunchy sausage spicy sriracha sauce ... and puckering pickled onions. We call this a combination of ... "fierce flavors."

28. An electrifying combination of fierce flavors and aggressive textures.

29. The texture of coarse ancient grains ... spelt, barley, flax seed, buckwheat, quinoa ... softened by a poached egg and funky up with wild mushrooms.

30. Another example of soft versus crunchy textures for breakfast.

31. Right on trend in America: Fried chicken breakfasts ... here with a runny egg, aioli and crunchy pickles. All-day breakfast items these days comprise 68 percent of meals at full-service restaurants, 63 percent at cafes, and 55 percent in fast-food outlets.

32. There's been lots of experimenting about this texture business... and a chap here in England has determined that food tastes sweet from a smooth round spoon and bitter from a roughly textured spoon. Neurologically speaking ... perhaps, just perhaps ... we'll discover that texture actually is a taste ... but for sure it is an aspect of gastronomy that needs more exploration.

33. Not to be left behind in the breakfast and texture revolution, here's a CPG response ... an effort to lure people away from the drive-thru.

34. Speaking of consumer packaged goods, the texture game isn't just about breakfast. Here's a new exercise in crunchy, crispy, smooth, creamy and chewy components ... headed your way.

35. We're looking here at yesterday's soothing dishes of mushy peas and potatoes versus a crunchy bacon taco filled with macaroni and cheese. So you see here the making of a redefinition of "comfort food."

36. Now ... let's change topic again ... this time toward the notion that vegetables are pushing meat to the side of the plate ... and sometimes off it altogether.

37. This former US president was serious about loathing broccoli ... but it has become a rallying cry among those advocating that we consume less meat.

38. When you get all-vegetable food like this ...

39. ... or this ...

40. ... or this ...

41. Or that people would visit a steakhouse in order to spend ten pounds for a single carrot.

42. Therefore, you see why Whole Foods just added a vegetarian restaurant to its repertoire.

43. Restaurants specializing in hamburgers all are experimenting with plant-based burgers, with varying degrees of success. Two CPG companies are harvesting huge private equity money to develop plant-based burgers that actually bleed. One is already sold in three upscale restaurants and a fast-food chain.

44. We're seeing vegetables added to ice creams and yogurts ...

45. ... like these Haagen Dazs "spoon veg" products in Japan.

46. I spoke earlier about how textures were redefining comfort food at breakfast. The same is occurring at other mealtimes. We're no longer content with fatty-mouth mac and cheese. Last year on Pinterest, consumers saved 54,000 comfort food items daily, a 140% increase from the previous year. But ... comfort food searches increasingly include ... vegetables ... up 366%. Lasagne is down 69%, macaroni down 55%. You see where this is heading, yes? Healthy and fresh is trumping mouthfeel in terms of comfort food..

47. So you see spiralized vegetable replacing pasta atop (if you can find it) a piece of sauteed fish.

48. And artfully arranged crunchy vegetables atop soothing , smooth avocado toast.

49. I could spend the rest of my time on this ... but let me sum of this topic by noting that ... as cows, pigs and chicken pollute the air, the ground and our water ... mainstream food culture is shifting toward plant-based notions of tomorrow's lifestyles ... and that highly Googled and Instagrammed vegetable dishes are today being served

at "conventional" restaurants a matter of course. There even are vegetable butcher shops popping up around the globe.

50. However, there's hope for carnivores. We're seeing increasing combinations in the US of artisan butcher shops with meat-focused restaurants ... much as Will Lander has done here bravely at Quality Chop House. This one, in Los Angeles, has a hamburger grill at the end of its butcher counter

51. ... serving this decidedly non vegetarian menu.

52. Time to change topics again ... this time to one that historically is grim ... but also gastronomically exciting. Every day's news tell us that the world is coming apart politically ... causing huge displacement of peoples. Increasing numbers of refugees are bringing their food to other countries ... which is why I say that the world is coming together on the plate.

53. Of course, Brexit is designed to insulate you from from all this ... but all the red zones on this map show areas of political instability if not outright savage warfare.

54. So ... however sadly ... it might be of useful to learn what ... for example ... Syrians eat for breakfast ... since it has nothing in common with a full English breakfast ... but certainly reflects the concept of vegetable-forward eating ... and also the notion that we should be paying attention to ... changing texture. Now back to global flavors crowding together on a single plate.

55. In the US, we have an unfortunate tendency NOT to leave well enough alone. We're constantly tinkering ... perversely perhaps ... with flavors. In this example, someone's decided that honey by itself is not enough.

56. And not just in restaurants. I'm always prowling supermarket aisles ... especially snack food ... for flavors that later will appear in America's dinner plates.

57. Clearly, even Pepsi-Cola ... and Coca-Cola as well ... are tinkering with their sacred formulas.

59. Something tells me the world wasn't await this second coming of cheddar cheese, but here it is ... on the shelves of Aldi in America ... and maybe here as well.

60. At the restaurant level we get cross-cultural dishes like this ...

61. We get Chinese steamed buns stuffed with kosher pastrami ...

62. ... and the hotly trending Sushi-Rito, which is a sushi roll filled non-Japanese ingredients and eaten like a burrito. Sometimes the seaweed wrap is rolled inside a real burrito ... and I'm waiting for some madman to drop that concoction into the deep fryer.

63. Also trending: This famous Vietnamese sandwich is being filled with cross-border ingredients ...

64. as is the equally complex Mexican cemita ... and the layered Cuban sandwich. Nothing is sacred. So we're looking at lots of mixing and matching and ethnic cross-breeding.

65. One final large trend: Bowls are the new plates. We're increasingly eating from bowls ... across all restaurant segments. In this case, it is a salad.

66. Perhaps the hottest trending new item in the US is poke ... a raw fish import from Hawaii that is best described a cubed sushi tossed with various marinades and spices. There a dozen or more fast-casual startups serving only poke variations ... in bowls, of course.

67. Give a choice of a sandwich or a bowl, people in the US increasingly choose bowls.

68. This began as a healthful breakfast bowl (with about 1200 calories) and now is consumed all during the day.

69. Here's one that's right on trend.

70. CPG people are getting the message ... this from a company owned by Kellogg's. Perhaps the whole world's foods are not actually coming together on a plate ... perhaps they're cross-breeding in a bowl.

