

# BAUM+WHITEMAN

INTERNATIONAL FOOD + RESTAURANT CONSULTANTS

## BAUM+WHITEMAN CONSULTANTS PREDICT **12 HOTTEST FOOD & BEVERAGE TRENDS IN RESTAURANTS & HOTELS FOR 2023**

Baum+Whiteman's highly opinionated 2023 forecast explores next year's food and restaurant trends: Rise of ultra-expensive private dining clubs ... Pickup is the new delivery ... The wilting of plant-based food ... Mustard seeds are the new caviar ... Yes, you should dry-age fish ... Mortadella makes a comeback ... Cabbage is the new kale ... Artificial intelligence will kill McJobs. Plus: 20 Buzzwords for the year ahead.

**Baum+Whiteman creates high-profile restaurants around the world for hotels, restaurant companies, museums and other consumer destinations.**

---

November 4, 2021 -- FOR IMMEDIATE USE

Contact: Michael Whiteman [mw@baumwhiteman.com](mailto:mw@baumwhiteman.com) 718 622 0200

## **IS A RECESSION HURTING AMERICA'S RESTAURANTS? IF SO, FOR HOW LONG?**

Only a fool knows. But here are several ways of looking at the question:

- If you look at bank balances, you'll find that consumers still have lots of money. Billions shoveled out by the government haven't yet been spent. Consumers, say some economists, have (as of this writing) about 20% more cash than before Covid struck. State and local agencies ... hampered by lethargy and politics ... are sitting on piles of federal funds with a couple of



---

**BAUM+WHITEMAN LLC**  
912 President Street Brooklyn NY 11215  
781 622 0200 [mw@baumwhiteman.com](mailto:mw@baumwhiteman.com)  
[www.baumwhiteman.com](http://www.baumwhiteman.com)

years' worth of money to spend. Consumers are spending, regardless of rising food prices. So much depends how fast people burn through those hoards. But ...

- If you want dinner tonight at a big-city upscale restaurant, forget it ... they're overbooked. Some have hundreds of hungry souls on waiting lists. The more expensive the restaurant, the longer the list.
- If you ask fast-food and fas-cas chains, they'll likely tell you that high (but not super-high) earners are now an important source of new customers ... people trading down from full-service restaurants because they're worried ... not broke, just worried.
- They'll also tell you that low wage earners are cutting back on restaurant visits or trading down. But fas-cas and fast-food place are making it up with price hikes ... they're going after profits rather than customer traffic.
- If you look at the number of luxurious private clubs being launched ... with \$200,000 initiation fees ... you'd think we were back in the Roaring Twenties. (*see next page*).
- Unsurprisingly, this leaves in limbo a grand swath of middle-tier restaurants that ... unable to hire help, or cope with rising prices, or ease into automation ... may face another purge, just as they did during the Covid collapse.
- As in prior downturns, big-ticket purchases ... renovating the kitchen, buying an evening gown ... may be put off. But that frees money for dinner at STK or Longhorn, depending on the depth of your cash cushion.

The problem is: If consumers continue spending, inflation will continue rising and the Fed will squeeze even harder. If consumers stop spending, well, then, whoops! ... we're in a recession for sure. Is there a middle ground? Place your bets and check in after Christmas.

**PRIVATE CLUBS ON THE RISE. AND YOU CAN'T GET IN.**

Post-Covid, people want to be together again ... but not with just anybody. Hence, a boom in ultra-luxurious members clubs, along with restaurants that are “public” in name only.

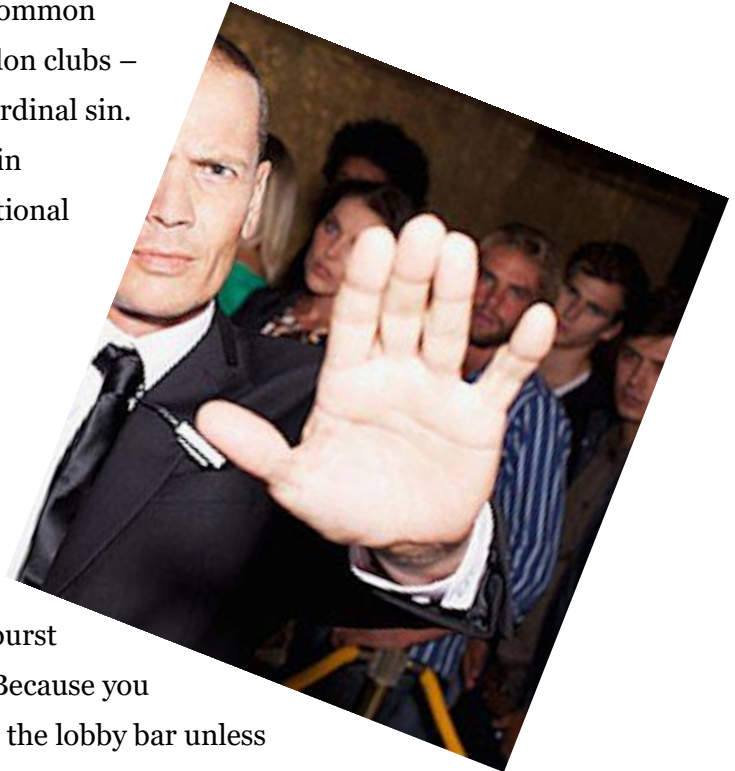
These aren't traditional clubs whose members had common backgrounds – say, Yale or Harvard or old-boy London clubs – with dress codes, and where doing business was a cardinal sin. People joining these new clubs have something else in common: These are transactional spaces for transactional people, based largely on the heft of their brokerage accounts.

It'll cost you as much a \$500,000 to join the latest batch of clubs. And then you're obliged to spend your monthly mortgage payment on food, beverage and other services.

At the just-opened Aman Hotel in New York ... in a burst of *chutzpah* ... the entire hotel is essentially a club. Because you and you can't eat in their two restaurants or drink at the lobby bar unless you're staying in the hotel ... where rooms start at \$3200. If that's not enough, the hotel has a real private club (mostly for locals) where ... for \$200,000 ... you gain access to uber-concierge services, hotel amenities, and those restaurants.

Entire mansions are converted into multi-level clubs ... multi-level meaning four stories or more, with accessibility to certain spaces based on what you've sunk into your initiation fee. On top of that, restaurants are opening as members' clubs. And launching NFTs, the purchase of which may entitle you to three reservations a year, or a prime table, or just about anything cooked just the way you like it ... if you can understand what an NFT is.

All this thumbing of noses at The Fed and poo-pooing recession talk is happening in New York, London, Amsterdam, Miami, Chicago, LA. We have links if you want them.



## WHAT'S NEXT FOR FOOD HALLS?

We haven't reached Peak Food Hall yet ... because landlords keep shoving new ones into long-vacant retail spaces. But the field is getting awfully crowded. We foresee two trends, neither mutually exclusive:

**Ethnically specific food halls.** You find these all over Asia but not in the US. A new Singapore-based hawkers hall in New York is an example. Others include Vietnam-focused Eden Center food hall in Falls Church, Va. ... a Latino-focused [La Cosecha](#) in Washington ... Jose Andres's [Mercado Little Spain](#) in New York ... Japanese The Spot near DC.



**Bread and Circuses.** Since there's more to a night out than just food, turning food halls into social hubs could provide points of differentiation. Live bands, dancetarias, cartoon days and retro movie nights, streaming sports events, multiple bars. Also enhanced retail ... including "wet market" stalls such as seafood vendors or specialty sausage makers or ethnic bakeshops. Entrepreneurs and landlords are kicking these concepts around.

## PISTACHIO: NUT OF THE YEAR

We forgot to flag this last year, so we're doing it now. We're seeing more and more pistachio nuts on menus. Pistachio replacing pine nuts in pesto; as an ingredient in inventive Mexican moles; with cheese as a filling for tortellini. Combined with cardamom, adding color to Danish pastry. Also sprinkled on slices of mortadella for color atop pizza. (Also, see "Crema," below.)





**DELI MEAT OF THE YEAR: MORTADELLA MAKES A COMEBACK**



*Mortadella, burrata, pistachio on pinsa (which is not exactly pizza)*

Long-banished as downmarket and laden with fat, grandpa's mortadella is suddenly a signifier of sophistication and respectability. It is making appearances mixed into meatballs where it adds a new flavor dimension; as a topping for pizza with a sprinkling of pistachios; on charcuterie boards where it represents nostalgia, and piled into deli meat sandwiches as a merchandising "upgrade." Thick-cut and fried, could mortadella become the next SPAM?

**YOUR FISH IS TOO FRESH?**

Chefs are changing their minds about how "fresh" your fish should be. Not everywhere, but here and there chefs are taking cues of ancient Japanese techniques ... and dry-aging fish in much the same way you'd age a rack of New York strip steaks. This is not for the faint-hearted, but hanging a snapper or branzino or a large cut of tuna for up to a week firms up the texture; concentrates flavor; eliminates faint but objectionable fishy odors; and umamifies (if not

# BAUM + WHITEMAN

INTERNATIONAL FOOD + RESTAURANT CONSULTANTS

mummifies) it. In other words, it just plain tastes better. In addition, no one can tell you've aged the creatures. Added shelf-life means virtually eliminating waste. More info at:

[www.thejointeatery.com](http://www.thejointeatery.com) and [Fish Butchery \(@fishbutchery\)](https://www.instagram.com/fishbutchery) • [Instagram photos and videos](#)

Chefs also are experimenting with brining fish ... sometimes overnight, sometimes for an hour or two. A light brine improves flavor and, as with chicken, helps prevent drying. If you've seen white stuff oozing from a fish you're cooking (most visibly with salmon), brining will put an end to that. For small pieces of fish, even a ten-minute dunk in salt water will improve your dinner.



## CREMA

The word "crema" is popping on menus. Not the foamy stuff on your espresso.



This one is a spreadable (or squirtable) condiment ... fundamentally a flavored bechamel-like sauce, often at room temperature. They're palate punctuations in sandwiches, additional flourishes atop pastas or salads, or even as a base upon which to plop a veal chop. In truth, cacio e pepe is a sort of crema.



Scan the menu of the sizzling [All'Antico Vinaio](#) sandwich shop ... in Florence and Venice ... and you'll find crema di pistachio, crema di tartufo, crema di parmigiano, and crema di funghi, all used as sandwich spreads. Their two-unit New York branch has

similar spreads. You'll start finding cremas on upscale menus ... sometimes masquerading as fondutas, sometimes mislabeled as intensely flavored mayonnaise. Most chefs make their own, but many are available in jars and they're great for charcuterie boards at home and restaurants.

*(Jarred, above right; yellow pepper-potato crema fettuccine with smoked paprika, above, left)*

## THE WILTING OF PLANT-BASED FOOD

Consumers are cooling to plant-based food. Supermarket sales of faux meat dropped about 10% by volume in the last 12 months, while sales of the real meat continued rising. Other plant-based items ... creamers, burgers, fish, sausages ... also are under pressure. So is former stock market darling Beyond Meat, whose stock has slumped from \$108 to about \$12 in the last year.

Price is part of the reason. So is taste, which doesn't quite get there. Much bigger reason: Complicated ingredient labels suggest that these really are ultra-processed food compared to, say, a slab of fish. People are increasingly dubious about claimed health benefits ... and benefits to the environment ... from what many still call "frankenfood."

Trial runs among chains come and go but there are few world-beaters, largely because mainstream consumers haven't bought into plant-based concepts. The portion of consumers willing to try plant-based food, and then buy again, "may already have reached a saturation point," says the consulting firm Deloitte.

That doesn't mean the game's over. Plant-based chain restaurant wannabes are still launching ... hoping to alter the way we eat. (Georgia-based Slutty Vegan generated endless lines when it opened recently in Brooklyn). Dozens of alternate protein manufacturers are being funded with billions of bucks. A game-changer would be a solid hunk of faux salmon or steak that accurately replicated the real thing. There are such things being tried in Asian and Europe, but not many and not here. And we may be surprised by synthetic biology startups that are fermenting copycat proteins in large vats or growing meat from stem cells and mushroom roots. But we said that last year.





### THREE DISHES NOT-SO-RANDOM DISHES YOU SHOULD KNOW ABOUT

**Plov:** A rice-meat-vegetable casserole served from the Caucasus to Ukraine ... with spices varying widely depending on location. Interesting now because of unrest in the region and the ongoing war. Has a crunchy crust on the bottom ... difficult to achieve ... that you tear into once the baking vessel is upended onto a platter. Often the casserole is lined with lavash (*photo, right*) instead of rice doing the job itself. Sometimes the crust is served separately. Plov ... like paella ... is related to the word “pilaf.” A clever restaurateur will figure out how to make an eye-catching serving for one person or two and the dish will leap beyond ethnic restaurants.



**Pinsa:** Pizza-ish, but not pizza. This flatbread comes from ancient Rome where the dough is “pushed” into shape rather than tossed. It benefits from ultra-long fermentation ... up to 72 hours ... is heavily hydrated ... and can be made with flours that never appear in pizza. Served in small ovals, it produces a much lighter, airier dough. Catching on among serious Italian restaurant chefs ... and appearing on charcuterie boards.



**Peposo:** A Tuscan beef stew distinguished by massive quantities of whole and crushed peppercorns, garlic and a bottle of Chianti. The meat is not floured so the remaining reduced liquid is intense but not thickened. Gets zero for looks, but those peppercorns sure punctuate the meal. Getting discovered by chefs delving into heritage dishes.

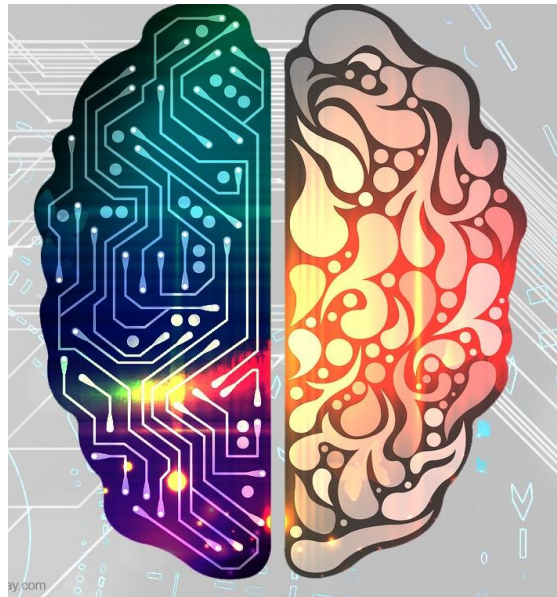




## **AI? AYE, AYE**

All the talk about robots in restaurants turns out to be accurate ... but shortsighted. The future, it appears, lies in the Artificial Intelligence systems that direct the robots ... and that soon will replace many functions of restaurant managers. These, like people, are computers programmed to learn, but unlike real people they don't repeat their mistakes.

Think of a restaurant manager or owner checking today's weather and trying to estimate how many onions to chop, how many people to schedule, how much money he'll take in, what his ratio of in-store dining to delivery will be ... and, as the day goes on, how much to order for tomorrow. Machine learning AI will add last year's and last week's and yesterday's performance of these variables ... and many more ... and tell the manager when and how much to prep, when to cook, when to start replenishing his production line, when to shift a veg prep person to the dishwashing station.



Not to mention trendlines suggesting that he modify certain aspects of his menu. At the same time, AI is fielding phone calls. And directing robotic production of pizza, french fries, taco chips, pasta dishes and drink dispensers while flipping hamburgers and placing them, unerringly, on toasted buns.

These humongous data sets are far beyond human capacity to juggle or understand.

The story line is that employees displaced by automation will be deployed to “enhance” the dining experience. In truth the effect will be to wash out as much labor as possible. Especially as more seatless restaurant are developed (see next item). Say goodbye to McJob.

## **PICKUP IS THE NEW DELIVERY**

Driven by inflationary fears and escalating delivery fees, people are shifting to picking up their own food. Fas-cas and fast-food chains are making it progressively easier by building double and triple pickup lanes at their restaurants ...

... exclusively for people who've pre-ordered online. The idea is to wean customers away from profit-killing delivery apps and, at the same time, save customers money ... often as much as 30-50%.

Adding to this shift: Delivery people are finding a few apps that signal which customers are top cash tipppers ... so if you're a cheapo, your pizza sinks on the priority. If your too-small tip is already on the bill, don't be surprised to find drivers snubbing it altogether.

The idea is to take as many kinks out of order-pickup process as possible. Which is why you see chains like Taco Bell making more room for pickup-only facilities by building their kitchens overhead. And why Chipotle's proliferating pickup lanes (and pickup-only stores) exclusively for people who've ordered ahead via a mobile app. Lots of chains are following. These are not drive-throughs where you spend minutes staring at a menu board, shouting your order to an unseen clerk, moving your car forward, and then waiting for a package to appear. You can be out of pre-ordered pickup lanes in 30 seconds.

Two possible hitches: Expensive gas deters driving. Inflation causes people to cook at more home again ... using all the paraphernalia they purchased during Covid.

We'll see how this plays out when snowdrifts pile up this winter.



## **BUTTER BOARDS: WHAT'S LEFT TO SAY?**

The farcical spread of butter boards won't die quietly ... until a round of Covid suggests this isn't a sane or sanitary way to consume dinner. But the concept could morph into other, less silly, but unpredictable, forms. There's history to consider:

More than 20 years ago, restaurant [Alinea](#), in Chicago, was strewing sauces, condiments, pastries and bonbons across entire tabletops, creating a communal, get-your-hands-dirty dessert for a crowd. Not much after, restaurant [Street XO](#), in Madrid, lined its dining counters with butcher paper, upon which it painted and drizzled entire courses right in front of the customer ... like three-dimensional Jackson Pollacks. Tel Aviv restaurant [North Abraxas](#) long ago curated your dinner directly on brown craft paper... including its groundbreaking roast cauliflower, and a lamb-stock slumped cabbage served in a paper bag that oozed juices onto the dining counter.



Right on cue, Boston-based [Kured](#) is launching its second shop in New York, billing itself as the Chipotle of Charcuterie. It has a fas-cas assembly line and specializes in communal boxes of combinations of meats and cheeses along with many packaged components at retail. It is the equivalent of a charcuterie-board-in-a-box.

Look for more “breakfast boards”, especially from breakfast-lunch chains. Maybe the commodity “boards” will leap into action: National Cheese Board, Haas Avocado Board, Honey Board, Prune Marketing Committee. Just think: A five-foot guacamole board with infinite additions ... or peanut butter slathered across your kitchen table.

## **BUZZWORDS FOR 2023**

**Negroni sbagliato**: renegade bartenders ruining a perfectly good negroni by replacing gin with champagne -- Heat with flavor: **Bomba**, a Calabrian chili paste (appearing more often on menus than actually in restaurant kitchens) -- **Veganization** of popular restaurant recipes -- Upscale **meat pies** -- **Caraflex**, a pointy-headed cabbage looks great on a dinner plate -- **Surreal** one-off cakes resembling sci-fi experiments, extremely costly, inspiring restaurant pastry chefs -- Fried **cheese sticks** again, this time with fresh mozz or fontina -- **Caviar** bumps and other costly ways to eat fish eggs -- Rampant overuse of **cacio e pepe** -- **Clubsteraunts** -- **Guerrilla restaurant reviews**: 20 amateur seconds of takedowns and chef bashing on TikTok -- **Scallion pancakes** in non-Chinese dishes (under eggs over easy; folding into a burrito; fusion food thrives!) -- Wishful thinking: **V-shaped cocktail glasses** make a comeback -- Inflation triggers seriousness about **upcycling waste**, seeking alternates for certain grain shortages -- **Unionization** gets a grip -- **Jose Andres** might open more restaurants in '23 than Jean-Georges -- More restaurants adding **provisions/general store merchandising**, particularly online shops -- Ever **hotter chicken** ventures -- **Cabbage** is the new kale -- Fusion **churros** -- **Okonomiyaki** -- Restaurant owners with aging **gas ranges** fretting about laws requiring them to convert to electric equipment.

---

**Baum+Whiteman creates high-profile restaurants around the world for hotels, restaurant companies, museums and other consumer destinations.**

October 30, 2021 FOR IMMEDIATE USE

Contact: Michael Whiteman [mw@baumwhiteman.com](mailto:mw@baumwhiteman.com) 718 622 0200