



CHURCHILL

SOCIABLE SHARING | STREET EATS

ASIAN FUSIONS & BOWLS | CLEAN EATS | FIRE, SMOKE & SOUL | RUSTIC ITALIAN

LATIN FLAVOURS | STREET SPICE | DECADENT DESSERTS



— food —
INSIGHTS
S/S 2018



WELCOME TO THE SPRING/SUMMER EDITION OF CHURCHILL'S FOOD AND RESTAURANT INSIGHTS MAGAZINE, WHERE WE SHOWCASE OUR DETAILED INDUSTRY RESEARCH.

Throughout the year we monitor new restaurant openings, researching food styles and menus, interiors, tableware and colour in order to inspire and inform our new product development.

The popularity of South East Asian cuisine and street food fuels the trend for bowl food, making 'Fusions & Bowls' the largest growing restaurant food style. Low and slow cooked meats of the American South continue in popularity, and cities across the world regularly welcome new gourmet burger concepts to their streets.

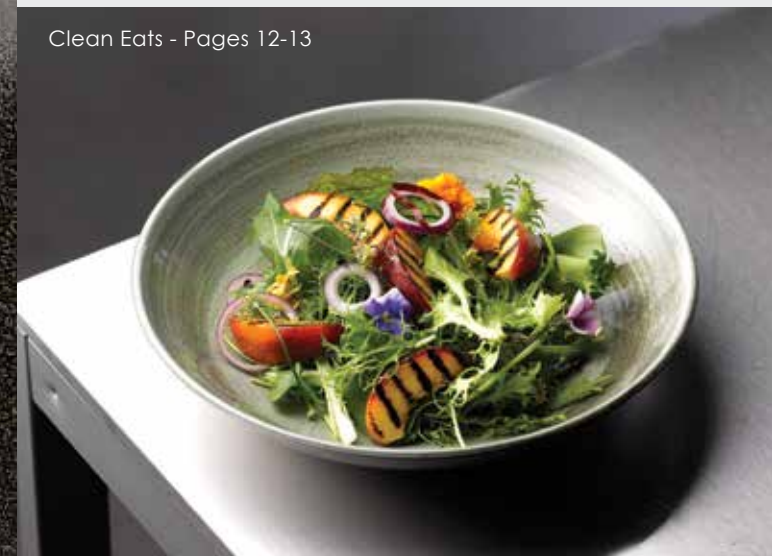
As diners expectations rise we see overriding trends with a spotlight on quality, sustainability, sharing style dining and authenticity.

Sophie Davies
Creative Manager, Hospitality

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OUR RESEARCH JOURNEY AROUND THE WORLD...



USA

San Francisco

Boasting more restaurants per capita than any other city in the USA, San Fran is renowned for its avant garde restaurant scene.

New York

Open Table counts over 30,000 restaurants in NYC, including 77 Michelin starred sites, 5 of which boast the coveted 3 star accolade.

Austin

The food scene in Austin continues to grow, fuelled by residents who love to buy local and home grown chef talent from the University's Food Lab program.

SAN FRANCISCO

AUSTIN

LIMA

NEW YORK

SOUTH AMERICA

Lima

In 2017 3 of the best restaurants in the world were named in Lima, and the city continues to be a hub of culinary innovation.

LONDON

BARCELONA

MADRID

BERLIN

MILAN

UK

London

London's buzzing multicultural community has made the city a hub of food diversity, innovations and fusions. With 65 Michelin starred restaurants and 6 of the best restaurants in the world for 2017, London is home to some of the world's most respected chefs.

The UK has experienced a culinary revolution which has changed the world's perception of the British dining scene.

London

Leeds

Bristol

Edinburgh

EUROPE

Berlin

A city on the pulse with food trends, from the world's street food to innovative fine dining fusions.

Madrid

Dubbed the food capital of Europe, attracting Michelin-Starred chefs and foodie tourists.

Milan

Dubbed the city of eternal style, Milan's food, restaurant and interiors are as chic as the clothes.

Barcelona

With a thriving tourist industry and vibrant eating out culture, amongst Barcelona's many astounding traditional restaurants there are innovative chefs experimenting with world flavours and fusions.

ASIA

Singapore

After a strategic move to become a foodie destination Michelin visited Singapore for the first time in 2017, naming the first street food vendors to ever receive a coveted star.

SINGAPORE

AUSTRALIA

Melbourne

Has been named amongst the world's best spots for food, and in 2017 the city hosted the World's 50 Top Restaurant Awards.

MELBOURNE

Diners embrace the relaxed and social aspect of small plates, tapas and sharing platters, taking the opportunity to taste different dishes while enjoying drinks and good company.

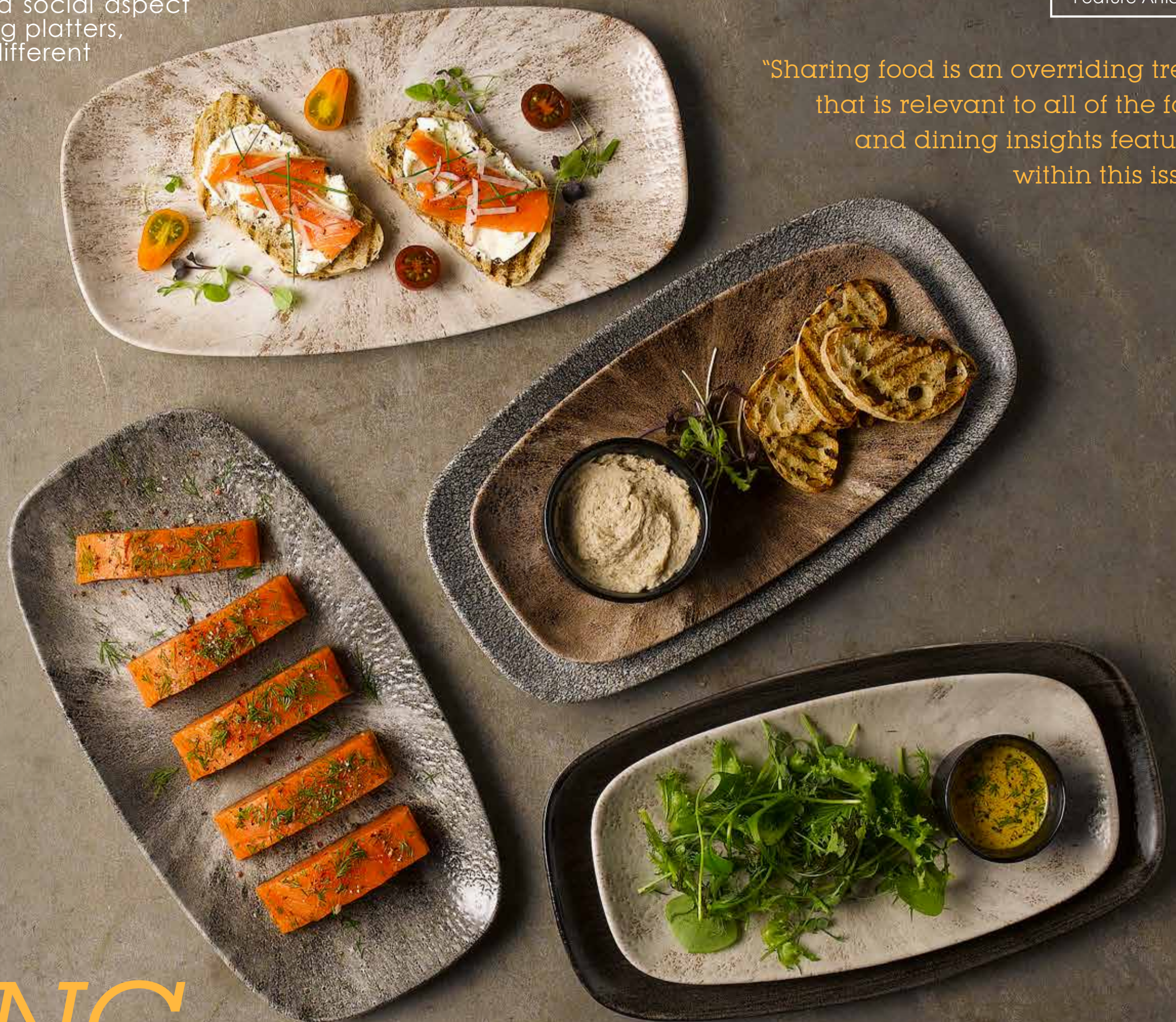
Nothing brings people together like good food, and studies are proving that sharing meals builds trust, social wellbeing and can even help resolve conflict quickly. Food is now linked with cooperation and sharing a meal with friends, family, colleagues or business associates is now recognised to improve relationships and dissolve territorial behaviour.

The enjoyment and the added social benefits of sharing food are fuelling the trend for food that is designed to be enjoyed by more than one person. Spanish tapas and Asian small plates like those at Shackfuyu in London are among the cuisines we see growing in popularity. While all manner of dishes are adapted to be shareable; Peter Paul in Berlin serves traditional German dishes in small, tapas style portions.

The fear of ordering the wrong meal is eliminated by ordering a variety of small plates to share with others, therefore making diners more adventurous and willing to try new flavours.

Millennials are now one of the largest generations in history and they're eating out more than any other generation before them, and they love to share. Sharing houses, cars and lifts, experiences on social media, thoughts, ideas and the food they eat, Millennial dining habits are a driving force behind the food to share trend.

"Sharing food is an overriding trend that is relevant to all of the food and dining insights featured within this issue."



SOCIAL SHARING

The breeding ground of food innovation and trends that trickle into our restaurants, street food markets across the world buzz with up and coming entrepreneurs, exciting new flavours and eager foodie diners.

Appreciation for all food types grow, and as the Michelin guide begins to show casual dining spots more recognition, we see the first two street food vendors to receive the coveted stars. The Michelin judges travelled to Singapore for the first time in 2016, where Hill Street Tai Hwa Pork Noodle and Hong Kong Soya Sauce Chicken Rice & Noodle became the first street food hawkers to be honored with the prestigious award.

In the Western world, food vans provide entrepreneurs the opportunity to test their concepts and gather loyal followings before investing in permanent premises. The restaurant industry sees entries from businesses already established in the world of kerbside dining. Wood fired pizzas from the likes of Homeslice and Pizza Pilgrims in London first won over foodies from the back of a van, Pizza Pilgrims now boasts 7 restaurant sites while Homeslice has 3 sites across the UK capital.

In Melbourne, Burger Theory started serving their quality burgers from the back of a converted truck in 2011 and now has 3 permanent sites. Healthy street food comes into its own with businesses like Sassy Spoon in Minneapolis where they first served up gluten-free wholefood from the kerbside in 2012, establishing their first restaurant in 2015.

Street Food is an overriding trend that is relevant to all of the food and dining insights featured within this issue.

STREET FOOD

The breeding ground of **food innovation**

STREET EATS!

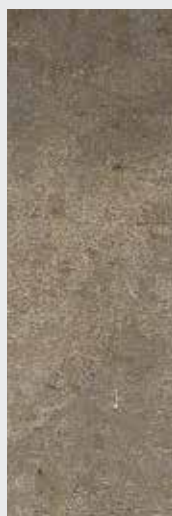
ASIAN FUSIONS & BOWLS

SOUTHEAST ASIAN | STREET FOOD | INNOVATION | HEALTHY | SPICES | BOWL FOOD | PACIFIC FUSION



Diners are more adventurous than ever before, seeking out the flavours, experiences and ingredients that they experienced while travelling. Our societies are multicultural and diverse, which means traditional family recipes from across the world are brought to restaurant tables. We see Korean, Japanese,

Taiwanese and Vietnamese growing in popularity, with a huge influence from Southeast Asian street food. After the rise of street food and casual dining the term 'bowl food' is now commonplace as bowls become the choice vessels for noodles, healthy broths and nutritious salads.



TRENDSETTERS

SABOTEUR - EDINBURGH
A Vietnamese diner serving street food.

LONG CHIM - MELBOURNE
Inspired by the bustling Bangkok street kitchens.

COTE - NYC
Upscale Korean Barbecue where diners cook their own steaks.

SHACKFUYU - LONDON
Japanese style izakaya serving up small plates designed to share.

BAO - LONDON
Hugely popular Taiwanese steamed buns from 3 sites across London.

ISSHO - LEEDS
A rooftop restaurant in Leeds serving contemporary Japanese.

KIN DEE - BERLIN
Innovative new twists on authentic Thai cuisine.

JINJUU - LONDON
Korean barbecue and street food, with influences from the US.

*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...

Plate it up...



Taste The Trend...

Vietnamese: **Pho** - Noodle soup made with healthy broth.

Korean: **Bibimbap** - Sizzling rice and vegetable dish served in a stone bowl.

Japanese: **Oden** - Hearty and warming hot pot with proteins and vegetables.

Taiwanese: **Gua Bao** - Steamed bun filled with pork belly

Thai: **Khao Soi** - Curried Noodle Soup

CLEAN EATS

HEALTHY | SUSTAINABLE | LOCAL | SUPERFOODS | VEGETARIAN | PLANT BASED | SEASONAL

As diners strive to live healthier lifestyles we see the trend for clean eating becoming more relevant to all hospitality sectors and markets. Health boosting foods with probiotic properties, low or no alcohol lifestyles, plant based diets, and food waste reduction are becoming mainstream.

Animal welfare is promoted and we increasingly see diners opt for plant based proteins and meat free days. Transparency is also key, as consumers want to know exactly what is in their food and how far it has travelled to their plates.



TRENDSETTERS

EINS UNTER NULL - BERLIN
Michelin Star restaurant that focuses on purity and simplicity.

GLORIA - NYC
Pescatarian restaurant with strong focus on sustainability.

TINY LEAF - LONDON
Zero waste, organic and vegetarian, located at the street food complex Mercato Metropolitano.

BEL-AIR - LONDON
Fast feel good food inspired by the healthy California lifestyle.

THE GREEN SPOT - BARCELONA
Healthy vegetarian dishes to wow meat eaters and non meat eaters.

NOURISH CAFE - SAN FRANCISCO
Healthy and nourishing salads and smoothies.

KITCHEN BY FOOD REBEL - SINGAPORE
Cafe opened by a health coach, specialising in buddha bowls.

PURE - LONDON
Changing the face of 'to go' food, healthy, nutrition, fresh meals to take out.

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Plate it up...



Taste The Trend...

Plant Based Proteins:

Lentils

Hemp

Chia Seeds

Quinoa

Spirulina

Edamame Beans

Probiotics:

Yoghurt

Kefir

Sauerkraut

Dark Chocolate

Kimchi

Miso

FIRE, SMOKE & SOUL

LOW & SLOW | SMOKEHOUSES | COMFORT FOOD | LIVE FIRE COOKING | FRIED CHICKEN



Barbecue has a growing presence in the restaurant industry. From the low and slow smoke houses of the US southern states, to the meats cooked over fire at Asian street food markets, Jamaican jerk flavours and souk inspired middle eastern meats. While traditional techniques of grilling and smoking are still celebrated by chefs across the world, there are now innovations and fusions emerging. The low and slow barbecue of America's deep south is fused with the spices of the Middle East or Southeast Asia.



TRENDSETTERS

SMOKING GOAT - LONDON
Casual Thai barbecue and street food restaurant.

SMOKESTAK - LONDON
Hailed by many as the best barbecue restaurant in London.

MRS LE'S BÁNH MÌ AND GRILL - LONDON
Vietnamese Bánh Mì and barbecue at Clapham Junction.

FAZENDA - LEEDS, EDINBURGH, LIVERPOOL, MANCHESTER
Brazilian barbecue with meats cooked on an open churrasco grill.

DONS BOGAM BLACK - NYC
Korean BBQ with high tech carts that wheel to the table.

THE PITT - BERLIN
Meats cooked for 18 hours over real oak wood.

JIMBO - MADRID
Authentic Texan smokehouse and craft beer bar.

FANCY HANKS - MELBOURNE
American style, slow cooked BBQ.

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Taste The Trend...

Korean: Bulgogi - means "fire meat", thin marinated slices of beef cooked over fire.

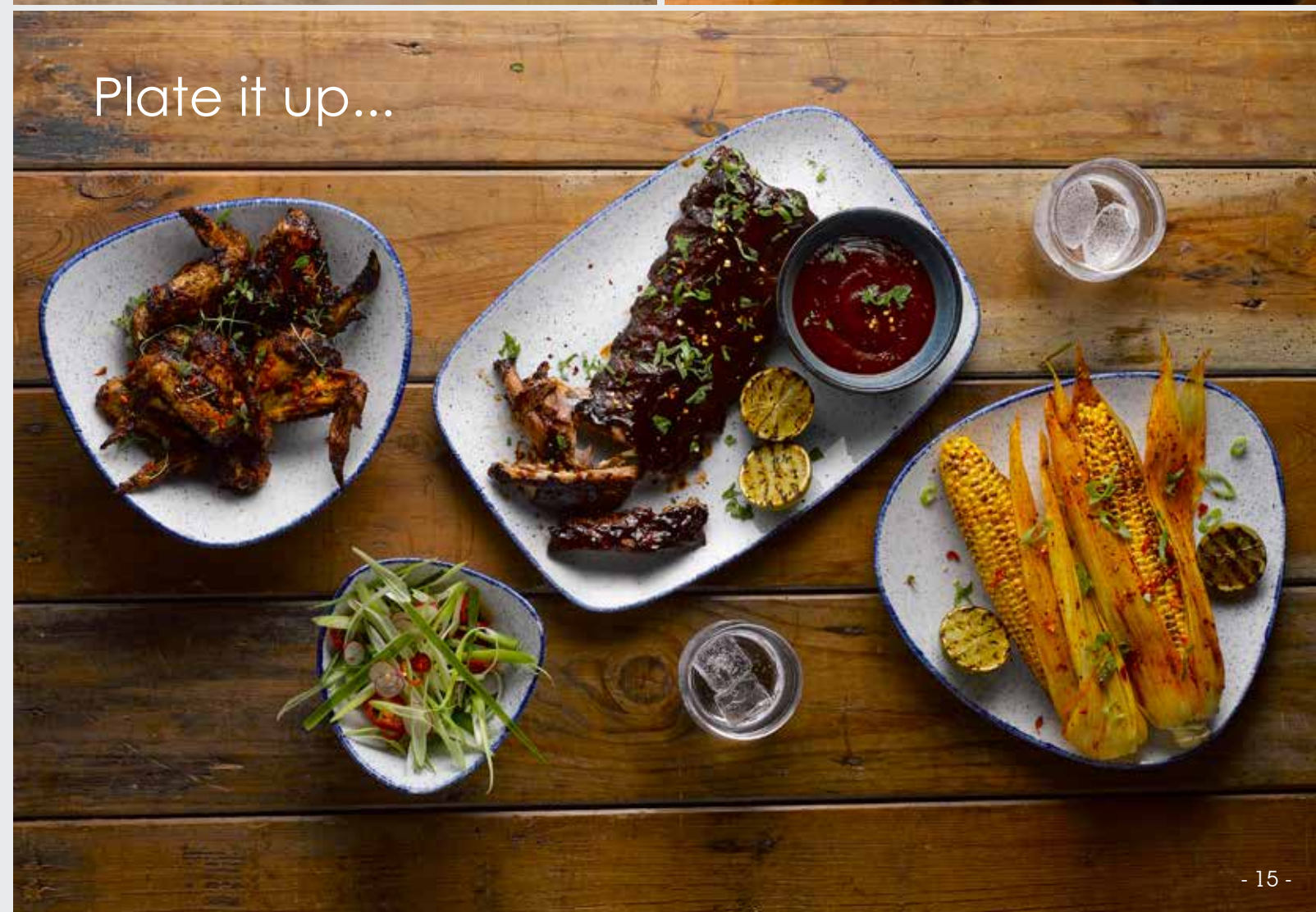
USA: Texan Brisket - cooked low and slow for hours, served up with cornbread and slaw.

Thai: Lao khao soi - Noodle soup served with barbecued chicken or goat.

Brazilian: Coração de frango - Barbecued chicken hearts.



Plate it up...

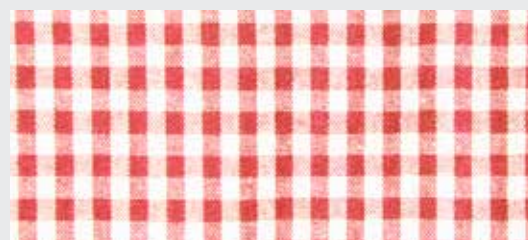


RUSTIC ITALIAN

WOODFIRED PIZZA | FAMILY FEASTING | VENETIAN SMALL PLATES | RUSTIC & RELAXED

The popularity for woodfired dining in Italy. Many of the top pizza ovens continues to grow, simple and short menus of pizzas made with top quality ingredients and paired with craft beer. There has been a rise in vegan and vegetarian Italian dining, with chefs embracing the heritage of meat free

dining in Italy. Many of the top Italian restaurant brands have launched dedicated vegan menus. The popularity for sharing food becomes evermore relevant for Italian dining, with family style feasting, small plates and sharing platters.



TRENDSETTERS

PIZZA PILGRIMS - LONDON
From humble beginnings as a street food vendor, Pizza Pilgrims is now one to watch.

FRANKIE GALLO CHA CHA - BARCELONA
Wood fired oven pizzas and craft beer.

RICCI'S TAPAS & CICCETTI - LEEDS & HALIFAX
Small Italian plates to share in a relaxing, contemporary atmosphere.

BAR TERMINI - LONDON
Italian coffee, cocktails and charcuterie.

MOD PIZZA - UK & USA
Customisable 'build your own pizza' concept from the US.

PI SHOP - BRISTOL
Simple, rustic concept selling wood fired pizzas.

MALAFEMMENA - BERLIN
Neapolitan wood fired pizzas.

LA SVOLTA - MELBOURNE
Wood fired pizza and Italian small plates.

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Taste The Trend...

Negroni - Classic Italian gin cocktail

Arancini - A small plate of stuffed rice balls

Antipasti - The first course of cured meats, olives, cheeses and more.

Nduja - Spicy sausage from Calabria, great in pastas and on pizza.

Plate it up...



LATIN FLAVOURS

STREET FOOD | COLOURFUL CULTURE | AUTHENTIC FLAVOURS | ENERGETIC & FESTIVE | EXPERIMENTAL FUSIONS



Colourful and vibrant South American cultures are recreated in restaurants around the world, with Mexican, Peruvian and Brazilian becoming dominant trends. Diners love of street food means that tacos have grown into an unfading trend, and colourful, fresh Peruvian ceviche has turned mainstream.



TRENDSETTERS

BREDDOS - LONDON

Taco restaurant with a cult following, now with 2 sites across London.

SEÑOR CEVICHE - LONDON

Celebrating the diversity of Peru, with 2 sites across London.

HABANERA - MADRID

European, South American and Caribbean influences in a colourful setting.

CHIDA CANTINA - LEEDS

Mexican street food and cocktails in a lively atmosphere.

BIG KOKKA - BARCELONA

Nikkei (Japanese-Peruvian fusion) cuisine with contemporary twists.

LA LUCHA - BERLIN

Authentic Mexican street food, tex mex and cocktails.

VIVA VERDE - NYC

Authentic Mexican cuisine with tequila and mezcal cocktails.

VERACRUZ ALL NATURAL - AUSTIN

Mexican food in Austin, from humble beginnings as a taco truck.

*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...

Plate it up...



Taste The Trend...

Ceviche - Peruvian dish of marinated raw fish & seafood.

Tamales - Mexican dish of dough steamed in a corn husk or banana leaf.

Pisco Sour - Peruvian cocktail of pisco, lime, syrup, egg white and angostura bitters.



STREET SPICE

STREET FOOD | AUTHENTIC | MIDDLE EASTERN | VEGETARIAN | HEALTHY & BOLD | REAL INDIAN

The bold spices and flavours of Middle Eastern and Indian street foods grow in popularity, across the world chef's strive to achieve authenticity. Diner's more adventurous palates, the street food trend and a rise in plant based diets are factors of fuelling the rise of Street Spice. Spices like Turmeric and cumin, ingredients like lentils and chickpeas are hailed as superfoods, and we begin to see them more on menus.



TRENDSETTERS

THE GOOD EGG - LONDON

Israeli inspired small plates with a insitu bakery and pitta oven.

DISHOOM - LONDON & EDINBURGH

Inspired by the fading Irani cafes of Mumbai and extremely popular.

MASALA 75 - BARCELONA

A contemporary curry house and street food truck.

CURRY UP NOW - SAN FRANCISCO

Indian street food truck and now restaurant.

SOUK KITCHEN - BRISTOL

Middle Eastern and Mediterranean served at 3 sites in Bristol.

BOMBAY BUSTLE - LONDON

Elevated Indian Cuisine and hailed as one of the best openings of 2017.

MAHA - MELBOURNE

Middle Eastern and Mediterranean small plates paired with cocktails.

OLD MONK - NYC

Contemporary Indian 'soul food'.

*Some of the innovative sites we've spotted on our global food research trips, not necessarily Churchill customers, just inspiring and pacesetting restaurants...

Plate it up...



Taste The Trend...

Vada Pav - Indian deep fried potato burger

Dosa - Indian pancake made from fermented dough

Batata Harra - Lebanese spiced potatoes

Zaalouk - Moroccan aubergine dip served with flatbreads

DECADENT *DESSERTS*

COLOURFUL | SOCIAL MEDIA WORTHY | GLOBAL SWEET FLAVOUR | HEALTHY ALTERNATIVES | INDULGENCE



Dessert bars, street food trucks generations drink less they dedicated to sweet treats and are looking for indulgence; instagrammable indulgence; elsewhere, and dedicated diners seek out social media dessert bars are offering worthy puddings. Towering an alternative to cocktails. freakshakes, Japanese fish However, sweet treats have shaped ice cream cones and also become the perfect the waffle ice cream wraps of accompaniment to a late Hong Kong have become the night drink at stylish and chic colourful dessert sensations bars. of Instagram. As young



TRENDSETTERS

BUBBLE WRAP - LONDON

Waffle wrapped ice cream, one of the most instagrammed foods in London.

BLACK TAP - NYC

Serving some of the most decadent freakshakes in NYC.

DOUGHNUT TIME - AUSTRALIA & LONDON

Indulgent doughnuts from group with 4 sites across Australia and 1 in London.

PATISSERIE CHANSON - NYC

A dessert tasting bar underneath a modern European style Patisserie in NYC.

2AM DESSERT BAR - SINGAPORE

Contemporary and premium desserts with cocktail pairings.

JOHNNY PUMP - MELBOURNE

Hailed by many as inventing the freakshake.

CODA - BERLIN

Stylish cocktail and dessert bar.

BASEMENT SATE - LONDON

Late night underground bar serving desserts and cocktails.

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Plate it up...



MICRO TRENDS

EMERGING TRENDS AND MACRO FACTORS THAT ARE CHANGING THE EATING OUT INDUSTRY...



Social Media...

Now with the power to make or break a new restaurant concept, social media has changed where we eat and what we eat.

Instagram and Twitter make it possible to turn diners into instant advocates for a business, as they share, tweet and upload images of their food and restaurant interiors. As a result dishes are made 'social media worthy' and interiors offer opportunities to snap and share.

Speciality Coffee...



Across the world consumers have become coffee connoisseurs, valuing quality over quantity and experience over price.

A rise in independent coffee shops, local artisan roasters and increased variety of bean means consumers have more aromas, tastes and textures to explore. Coffee shops such as Grind across London boast

their own blend, while roasters such as Dark Woods Coffee provide the industry with top quality roasts. Discerning drinkers now pride themselves of knowing good quality coffee from bad.

Artisan Bakery...



As foodies continue to seek out quality local, artisan produce we see a surge of local bakeries opening, providing the consumer with fresh, handcrafted breads, pastries and cakes.

Bakeries such as Claus Meyer's new NYC site Mayer Bageri and E5 Bakehouse in London source local and quality wheats and grains. Consumers also turn their own hands to making bread, attending baking courses run by businesses like Paul's Bakery in London. Artisan bakes sit side by side the trend for speciality coffee in cafes like Ole & Steen in London and Pum Pum Cafe in Madrid.

World's Breakfast...



Globalisation and well travelled diners means the worlds breakfast comes to restaurant tables, with more international choices in the morning. As our palates become more adventurous we embrace breakfast food from other cultures Indian, Mexican and North African becoming morning favourites.

We see North African Shakshuka, breakfast tacos and Akuri (Indian spicy eggs) becoming regulars on breakfast menus.



ONES TO WATCH

A FEW OF THE RESTAURANT BRANDS TO LOOK OUT FOR NEW OPENINGS IN 2018...

Pizza Pilgrims - London

From humble beginnings as a street food vendor, Pizza Pilgrims opened their first restaurant in 2013 and now has 7 sites across London, 1 site in Oxford and there are rumours that more are on the way in 2018.

Breddos Tacos - London

Another rags to riches story, Breddos started life as a makeshift hut in a car park where it gathered a devote following, now they have opened its second central London site.

&Pizza - USA

Starting out in Washington DC, &Pizza now has 26 sites, and in 2017 they cracked the New York dining scene.

Sticks N Sushi - Copenhagen, London & Berlin

Originating from Copenhagen this sushi and yakatori restaurant now boasts 22, including 7 in London and 1 in Berlin.

Peter Pane - Berlin

From burger grill and bar with an emphasis on local ingredients and 22 sites across Germany and Austria.

99 Sushi Bar & Restaurant - Madrid, Barcelona & Abu Dhabi

Freshly prepared Japanese haute cuisine in sleek and stylish settings.





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