

IN COLLABORATION WITH
BRAND GENETICS & PAKT



INSIGHT REPORT

MIDDLE EAST MEETS WEST

How Middle Eastern food culture is influencing how and what we eat.

NEW FRONTIERS

Middle Eastern cuisine is increasingly influencing not just what, but also how we eat. Whilst its dishes and tastes are becoming more widespread in the Western world today, evidence suggests this is just the beginning.

Western food culture has transformed in the last two decades—driven by factors including globalisation, changing lifestyles, health, wellbeing and sustainability. During this revolution, Middle Eastern cuisine has grown its presence in non-traditional markets dramatically—bringing rich, authentic dishes considered both flavoursome and healthy, to tables across the world.

In this report, we provide a cross-cultural viewpoint as to how this Middle Eastern influence is growing and identify five key trends to show how it is set to shape global food culture in the future.



THE TRENDS

For each trend we share an overview, cultural insight, best-in-class examples and supporting expert insight and data.

1. DINNER-TIME DIASPORA

2. MIDDLE EASTERN

INFLUENCERS

3. HAPPILY HALAL

4. MIDDLE EASTERN, NOT

MEDITERRANEAN

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1

DINNER-TIME DIASPORA

GLOBALIZATION | INCLUSION | DIVERSITY

The earliest occurrence of mass migration in the Middle East commenced during the collapse of the Ottoman Empire. For the last three decades, prolonged major unrest in some areas in the Middle East has pushed masses of people to migrate.

This peaked in 2015 when more than 1 million refugees and migrants arrived in Europe, many fleeing wars in the Middle East. As a result, refugees and migrants from diverse countries in the region have not only become part of Western society, but have brought elements of their own culture, heritage and demands along with them.



MANIFESTATION

REMARKABLE EXAMPLES

CULTURAL INSIGHT

'WE ARE HERE TO STAY'

Middle Eastern immigrants' and refugees' contribution to society has had a significant and valuable impact, they bring with them traditions, skills and different palate all of which are inspiring innovation. These individuals act as the intermediaries for blending Eastern and Western culture, cookery and heritage.

IMPLICATIONS: Consider how population shifts in your market might influence local cuisine in the future and create a new customer base that requires a different approach.



Republic of Booza, NYC

Republic of Booza names itself as “the world’s first modern booza brand.” Booza or Maraş ice cream is known to be a traditional method of making ice cream for long centuries in the Middle East. This traditional method has now gained access to the most vibrant neighborhood in New York City proving traditions can be brought to new audiences.



Cedar's Hommus, USA

Cedar's Hommus is one of the largest manufacturers of the hummus spread in the United States. The company is still family-owned and is working with the recipe Abe Hanna brought with him back from Lebanon in 1981.



Imad's Syrian Kitchen, London

Imad's Syrian Kitchen is a pop-up set up by Imad Alarnab, a Syrian chef and refugee living in London. Serving delicious food from the region, a proportion of profits go to Hope Hospital, a children's hospital in Syria. Imad proves that migrant skills can bring a lot to a new market, as well as supporting a good cause.

EXPERT INSIGHT

VOICE OF THE EXPERT

“

With the recent arrival of thousands of Syrians, how do you think Syrian food in Canada will develop?

Syrians bring with them a strong culinary tradition and their communities will bring food to the forefront. But it was not always like that. I was once interviewed for a book about the history of Arab populations in Canada, but there was no information to be found about Syrian immigrants. So I thought to myself, I'm going to write our history.

”

Habeeb Salloum, Arab-Canadian author
Interview on *The Globe and Mail*, 2017

INDICATORS

SUPPORTING DATA

36%

Migration Policy Institute, 2018

increase in the size of the MENA immigrant population in the US between 2010 and 2016 to 1.167.000.

919K

BBC via Eurostat, 2018

or more Syrians applied for asylum in the EU between 2014 and 2017.

40%

Office for National Statistics, 2018

of residents of London identified themselves either as Asian, Black, Mixed or Other ethnic group in the 2011 Census. London was the most ethnically diverse region in England and Wales.

2

MIDDLE EASTERN INFLUENCERS

INFLUENCE | INSPIRATION | EDUCATION

Given the Middle East has some of the highest social media usage in the world, it should be no surprise that celebrities and food influencers from the region are savvy operators. Now, they are connecting with global audiences, giving them new insights, inspiration and expectations.

Similarly, the region exhibits a style of food—embodied in colourful mezze platters—which is en vogue for social sharing both around a table and on Instagram. Ultimately both the personalities and styles of the Middle East are changing the way we approach food in the West.



MANIFESTATION

REMARKABLE EXAMPLES

CULTURAL INSIGHT

‘INSPIRATIONAL INDIVIDUALS’

Globalisation and technology have helped modern consumers learn from influencers beyond their geographical borders. The Middle East is at the leading edge of social media representation and Western audiences are adopting new ‘role models’ from this region.

IMPLICATIONS: In the Instagram age, see what you can learn from the food styles, experiences and personalities from a region as social media savvy as the Middle East.



Musa Dağdeviren, Turkish Chef

A self proclaimed ‘food anthropologist’, Musa is passionate about preserving and celebrating authentic Turkish cookery, with his Istanbul-based restaurant amongst the World’s Top 50 best restaurants. He has also become a food icon in the West after his appearance on the Netflix series ‘Chef’s Table’



Nusret Gökçe a.k.a Salt Bae

Nusret Gökçe is the owner of Nusr’et, a meat restaurant in Turkey, UAE, Qatar, USA and soon in the UK. Nusret has almost 21 million followers on Instagram, and has emerged as an Instagram celebrity within just a few years, teaching brands how to innovate in the digital/restaurant experience space.



Knafeh Brothers, Australia

With a firm belief in ‘baking and shaking’, the Knafeh Brothers sell their mother’s perfectly sweet Knafeh recipe whilst dancing and singing along to traditional Middle Eastern music, bringing a new level of experience to the product and posting their performances on social media for everyone to celebrate food and culture from the region with them.

EXPERT INSIGHT

VOICE OF THE EXPERT

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*[Nusr-Et] is a restaurant that recreates many times a night the viral Instagram video through which a man named Nusret Gokce became a meme called Salt Bae; that encourages paying customers to recreate nearly identical videos of Mr. Gokce in action; and invites them to post those videos to Instagram, where they can entice other people to come and see the meme made flesh for themselves. In its perfect circularity, its pure subordination of lived experience to mediated experience, **Nusr-Et may be New York's first true 21st-century restaurant.***

”

Pete Wells

The New York Times, 2018

INDICATORS

SUPPORTING DATA

Time.com, 2019

5

Arab individuals made the Time's 2019 '100 Most Influential People' list, including Rami Malek, Mo Salah and Saudi Activist Loujain Al-Hathlouth, more than ever before.

ClickZ.com, 2019

22%

of young adults have made a large purchase after seeing an online endorsement by an influencer.

Michelin Guide, 2019

11

restaurants serving cuisine from the Middle Eastern region were awarded with a Michelin Star in the 2019 guide.

3

HAPPILY HALAL

TRANSPARENCY | CLEAN EATING | ETHICAL

Consumers are increasingly seeking transparency and authenticity: Middle Eastern cuisine—with its emphasis on simplicity and natural ingredients—has benefited as a result.

More explicitly Halal, a central part of the Middle Eastern culture, is putting the region at the heart of this trend. Consumers are becoming better educated, dispelling misjudgements of the past, and this ethical code of conduct is not only growing amongst Muslim communities but is expanding outside of the faith to cater to people looking for more natural and sustainable products and services.



MANIFESTATION

REMARKABLE EXAMPLES

CULTURAL INSIGHT

‘CLEAN FOOD’

With a wholesome diet of plants, legumes, seeds and vegetables, Middle Eastern cuisine has an inherent natural and healthy perception that instills trust in consumers. These brands are finding new ways to demonstrate superior standards to modern consumers, such as using ‘Halal’, ‘Kosher’ and ‘Non-GMO’ branding.

IMPLICATIONS: Explore how you might build greater transparency and trust by adopting ethical practices such as those enshrined in the principles of Halal or Kosher.



Saffron Road, USA

Adnan Durrani, CEO and Founder: “Big food didn’t have a great history in this, but they have a wonderful future. (...) We’re seeing a lot of big food companies paying attention that this is not just a fad. This is actually a big shift in consumer behavior.” Saffron Road is a Halal business with an organic, non-GMO product line.

Sabra, USA

Sabra is a US based company that produces Middle Eastern inspired dips around the world. All products are certified Kosher and Vegetarian, and the organisation uses its ‘Sabra Chickpea Story’ campaign to highlight their use of Non-GMO chickpeas sourced from ‘Family Farmers.’

The Halal Guys

The Halal Guys started as a street food vendor in NYC and now it has restaurants all over the US. They recently opened their first restaurant out of the US in London, UK in early 2019. They are planning to expand in the future and continue to prove that Halal is no longer a claim to be shy about in the mainstream.

EXPERT INSIGHT

VOICE OF THE EXPERT

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*[Ethical products and services] is a trend that the Islamic economy is perfectly aligned with, from Islamic finance based on ethical, shariah-based principles, to **halal food that heightens trust between producer and consumer**—from the farm to the fork.*

”

Thomson-Reuters, *The State of the Global Islamic Economy Report 2018/19*

INDICATORS

SUPPORTING DATA

67%

Center for Food Integrity - CFI, 2018

of respondents said they are not confident in the safety of the food they eat, compared to 53% in 2017.

US\$1

The State of the Global Islamic Economy Report

trillion is the amount that halal food industry could exceed globally by 2020.

57%

Adweek via Edelman, 2017

of consumers either bought or boycotted brands based on their corporate values in 2017.

4

MIDDLE EASTERN NOT MEDITERRANEAN

AUTHENTICITY | NEW TASTE | PLANT POWER

To escape negative connotations Middle Eastern cuisine has previously been hidden behind the broader concept of 'Mediterranean food'. But as dishes such as falafel and hummus have become more popular, this is changing.

Increasingly there is appreciation in the West of positive Middle Eastern culture, but also increased media coverage has given rise to a broader understanding of the region—and specific local cuisines. As a result, Persian, Lebanese, Turkish, Israeli, Syrian and Moroccan cookery are all being recognised and allowed to celebrate their own unique identities and flavours.



MANIFESTATION

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'SPICE IT UP'

Greater awareness of food from this region amongst modern consumers has allowed Middle Eastern cuisine to emerge in new forms, and traditional flavours and spices such as harissa, za'atar, zhug, sumac, kefir, labneh and tahini are becoming an increasingly prominent feature of Western menus.

IMPLICATIONS: As customers become better educated and more adventurous, you should look to celebrate regional nuances and be brave with new and exciting flavours to intrigue and stand out.



Castillo de Canena Harissa Flavoured Olive Oil

Castillo de Canena is a premium multiple award-winning extra virgin olive oil producer from Spain that exports to more than 40 countries who recently released their latest harissa flavoured olive oil in early 2019.



Harvest Stone Organic Taste of Za'atar

Harvest Stone Organic is gluten-free, non-GMO, organic food packed with whole grains, seeds, and not much else. They recently launched a sprouted hummus crackers line following Middle Eastern culinary traditions.



Pinar Choco Labneh

Turkish brand, Pinar, has been awarded the 'Most Innovative Dairy Product' category for its recently launched Pinar Choco Labneh product, which is created for the Middle East markets, at the 2019 Gulfood Innovation Awards.

EXPERT INSIGHT

VOICE OF THE EXPERT

“

Things like hummus, pita and falafel were tasty entry points, but now consumers are ready to explore the deep traditions, regional nuances and classic ingredients of Middle Eastern cultures, with Persian, Israeli, Moroccan, Syrian and Lebanese influences rising to the top.

”

Whole Foods

Wholefoodsmarket.com, 2018

INDICATORS

SUPPORTING DATA

66%

Fona International, 2018

of all new harissa products introduced in the world between 2013-2017 took place in Europe.

128%

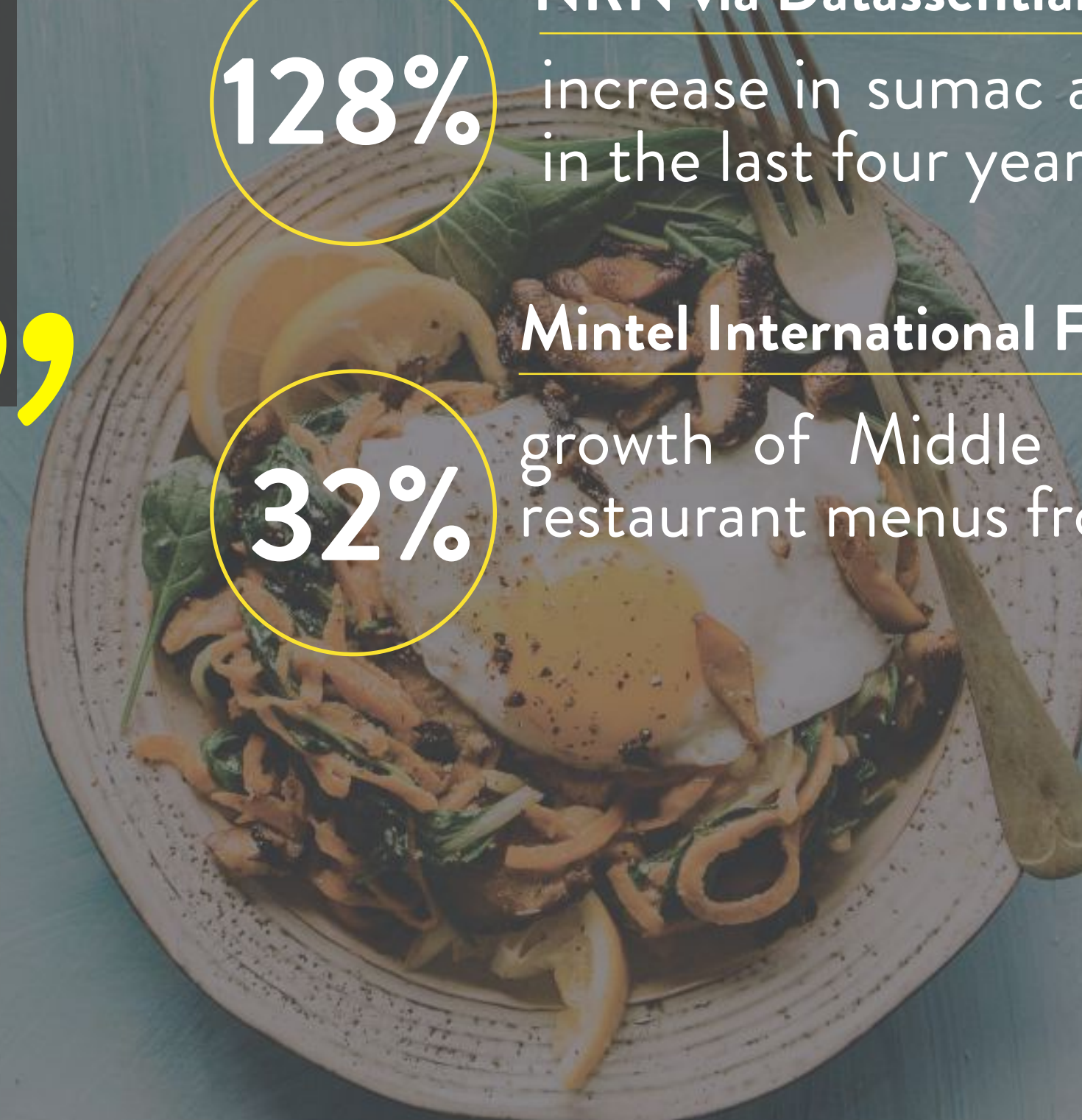
NRN via Datassential, 2019

increase in sumac appearance in US menus in the last four years.

32%

Mintel International Food Trends US, 2018

growth of Middle Eastern cuisine on US restaurant menus from 2015 to 2017.



5

FLAVOURFUL FUNCTION

HEALTHY LIFE | SUPERFOOD | WELLNESS

In the West, people are searching for food and drink that goes beyond just basic nutrition and provides functional benefits too. This growing demand for ‘superfood’ alternatives has put a spotlight on Middle Eastern cuisine—a diet naturally packed with functional ingredients—as a way to access flavour and functionality.

In Eastern culture, food is commonly treated as a source of health, power, beauty and potency. From harnessing the qualities of certain spices and ingredients, to following specific rituals of food preparation, the Middle East is teaching the world how to make food more than fuel.



MANIFESTATION

REMARKABLE EXAMPLES

CULTURAL INSIGHT

'YOU ARE WHAT YOU EAT'

Long prevalent in domestic markets, Middle Eastern superfoods such as turmeric, sumac, Urfa peppers, kefir, labneh, and pistachios are at the front of the global wellness trend. Western products are increasingly utilising these ingredients as better, natural sources of nutrition that help contribute towards a long and healthy life.

IMPLICATIONS: Explore how to go beyond simply satisfying hunger by using traditional Middle Eastern ingredients, recipes and rituals to help deliver greater wellbeing.



The Collective Dairy Launched Kefir Products

Following the success of The Collective Kefir cultured drink range in 2018, the brand launched a kefir cultured yoghurt range in October. Collective continues to prove the demand for Eastern flavours in the West by adding a Western twist to this traditional drink.



Eaulab Immune Boost Turmeric Water

Irish smart water startup EauLab focuses its product on health and wellbeing benefits for the human body, and it includes turmeric, a traditional Middle Eastern ingredient, to support the immune system.



Tims Dairy London Collection

Chris Timotheou, co-founder: “Our research tells us that consumers want a healthier indulgent fix (...) The rise in popularity and interest in spice and Middle Eastern flavours was also important.”

EXPERT INSIGHT

VOICE OF THE EXPERT

“

*As interest in fermented dairy products spreads in the West alongside **the arrival of the so-called functional foods market** in the 1990s, kefir started to move out of its home in the Caucasus via limited availability in specialist health food stores in Western markets to a more value-added, mainstream positioning, particularly in the US.*

Lu Anne Williams, Innova Market Insights
Drinks Insight Network, 2017

”

INDICATORS

SUPPORTING DATA

Innova Market Insights, 2017

94%

of global kefir launches used some kind of health positioning in 2016.

Mintel US Flavor Trends, 2018

51%

of consumers are willing to try an unfamiliar ingredient if it provides a functional benefit.

Synergy Flavours, 2018

156%

increase in new product launches with turmeric named as a flavor in 2017 compared to 2016.

WHAT'S ON THE HORIZON?

Middle Eastern food is moving beyond simply being recognised for well-known feasts such as kebabs and shawarmas to embracing its modern positioning as a healthy, superfood infused gastronomy designed to bring people together.

With the benefit of being wholesome yet tasty food, this cuisine combines the best of both worlds, and a range of external environmental influences as well as changes in consumer expectations from food and drink are skyrocketing Middle Eastern food into mainstream culture.

This may just be the beginning of a greater shift in the food space, in which food from this region becomes a modern standard for other cuisines to aspire to. While the future is uncertain, one thing is for sure—**new opportunities are emerging for brands and businesses to create modern innovations using ancient Eastern inspirations.**



GET IN TOUCH WITH US

We can help you unveil the cultural
codes of Turkey and the MENA
region!

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