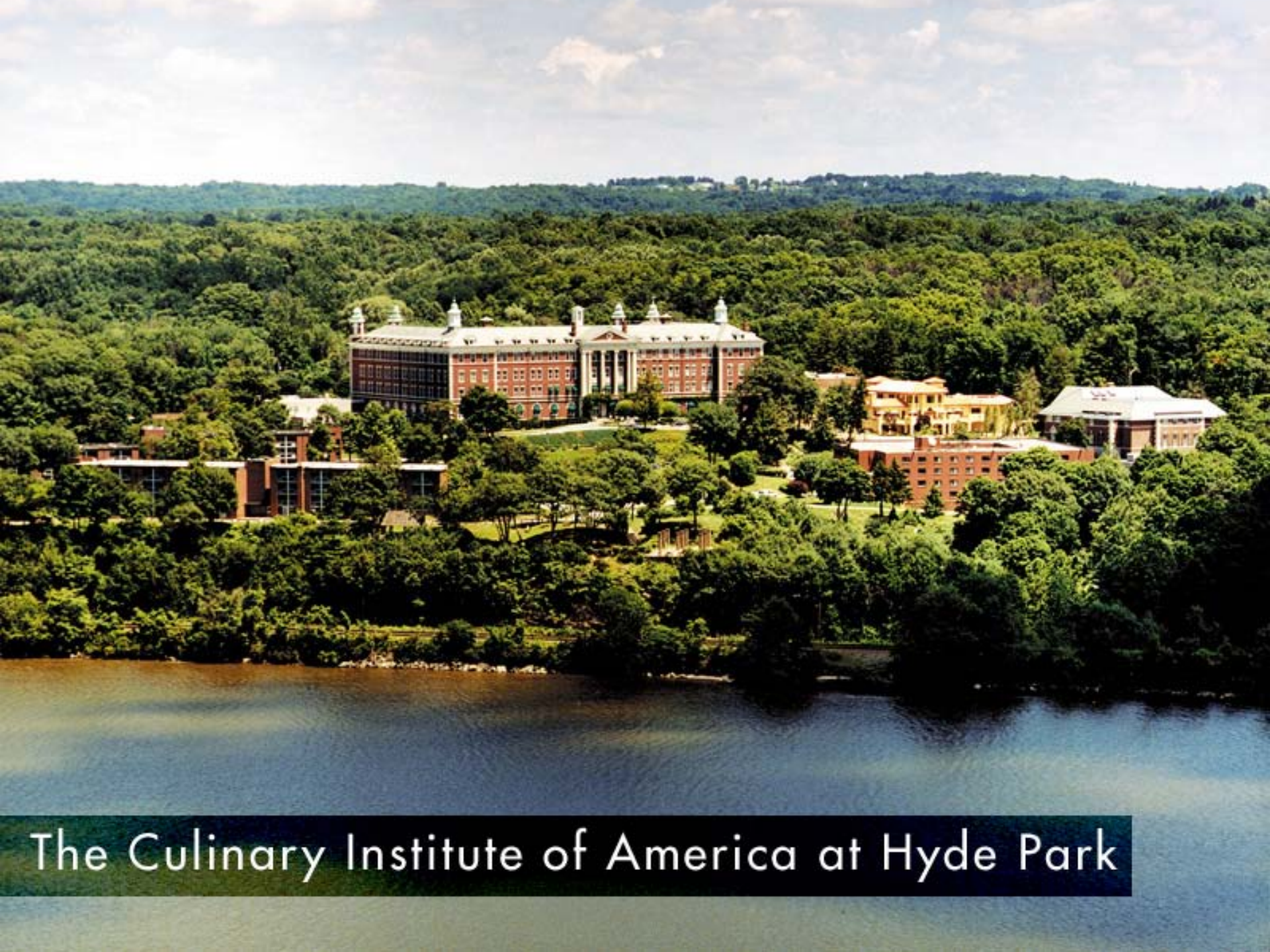
Flavors of Innovation:

Culinary Insights & Opportunities for California Food and Agriculture

GREG DRESCHER

Vice President - Strategic Initiatives & Industry Leadership

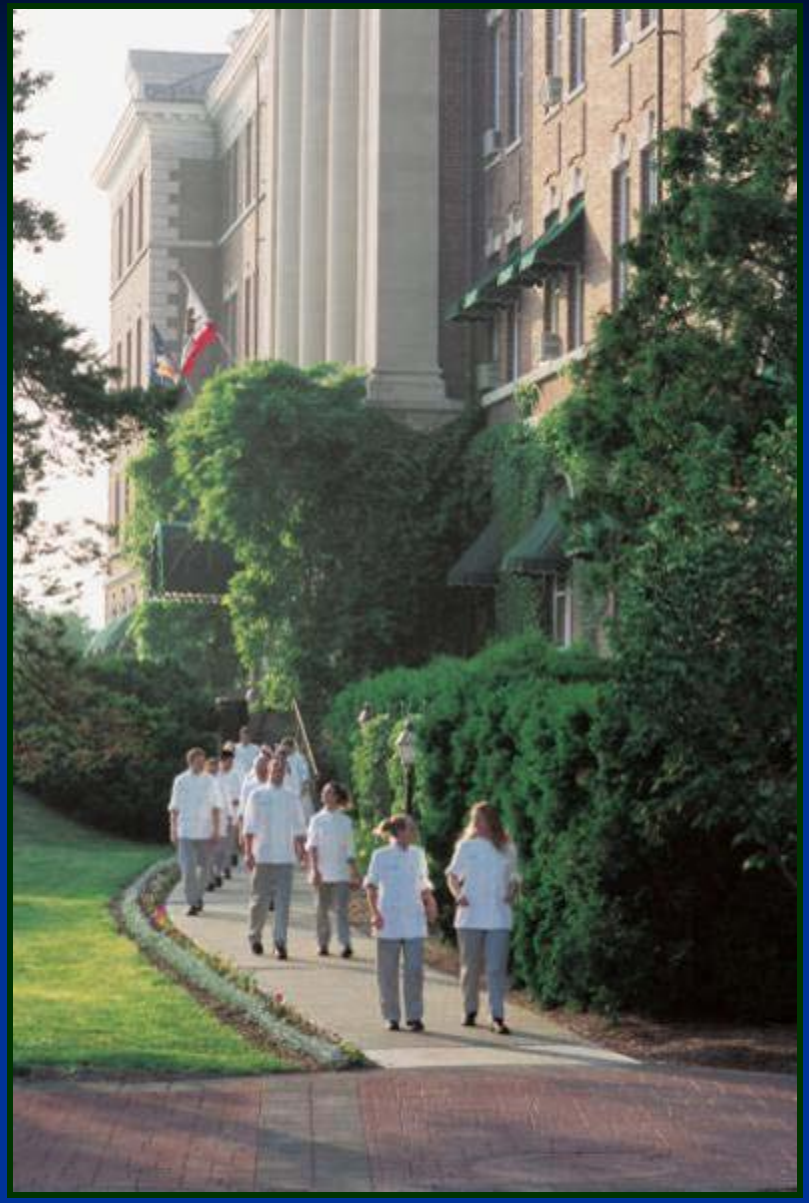
The Culinary Institute of America


The Culinary Institute of America at Hyde Park

The Culinary Institute of America at Greystone

GREYSTONE

The Culinary Institute of America, San Antonio



Mission & Values

We are a private, not-for-profit college dedicated to providing **the world's best professional culinary education**.

Excellence, leadership, professionalism, ethics, and respect for diversity are the core values that guide our efforts.

Who We Are

- **The Gold Standard in Culinary Education**
  - 4 Campuses: New York, California, Texas, and Singapore
- **Premier Source of Culinary Talent & Leadership**
  - 2,700 students enrolled in degree programs
  - CIA alumni exceed 44,000—working across the U.S. and around the world
  - 3,000 professionals attend continuing education yearly
  - Industry leadership programs, publishing, digital media

Our Alumni:
In Every Sector of the Food World

- Fine dining & independent casual dining
- Volume foodservice: Colleges, universities, hospitals, corporate foodservice, military & more
- Chain restaurants, from global chains to regional start-ups
- Hotels, resorts, casinos, cruise lines
- Food manufacturing: R & D, culinary leadership
- Agricultural marketing, distribution, retail
- Journalism/media: Food Network to glossy monthlies

Our Vision for the Future: Four Strategic Platforms

- Professional Excellence & Innovation
- Health & Wellness
- World Cuisines & Cultures
- Sustainability & Food Ethics

CIA Strategic Initiatives

International Conferences:

Top Global Talent

Leadership Retreats:

Influential Operators

Digital/Social Media

Partnerships & Participation:

California Food & Agriculture--Companies, Boards and Commissions

Chefs & Changing Food World

- Foodservice—now a **$600 BILLION SECTOR**; nearly 50% of consumer food dollar spent away from home
- **CHEFS DRIVE TRENDS** in retail, manufacturing and agriculture
- Chefs as **OPINION LEADERS**: They are increasingly engaged in issues ranging from children's health to sustainable agriculture and fisheries

Chefs & Changing Food World

"At precisely the same moment when the world's interest in food and food choices is growing, **we are asking chefs to make more choices on our behalf**, as we select and prepare fewer meals in our homes."

-- *CIA's Menus of Change initiative*

Convergence of Mega-Trends

- World Flavors/Cuisines
- Health and Wellness

together with…

- Sustainability & Food Ethics

World Flavors Mega-Trend

One of the **CULINARY MEGA-TRENDS** of our generation:

- Accelerating interest in a wide range of the flavors of **WORLD CUISINES**—from the Mediterranean to Latin America and Asia

- And…..a **SKRINKING** influence of the Northern European-based food traditions that defined most of American food history.

AZUCAR
CENTRAL

The New American Menu

In 2012, American Food
increasingly means World Food.

As American as Apple Pie?
Not anymore.

latin flavors, american kitchens

ENVISIONING A FUTURE OF EXCELLENCE, INNOVATION, AND OPPORTUNITY

Demographic Trends

The U.S. Census Bureau announces…

Caucasian Americans to be a Minority by 2050

Hispanics and Asians together, with their non-European food cultures, will comprise 34% of the population (28% and 6% respectively)…in less than 40 years!

Demographic Trends: California, Ahead of the Curve

Only 42% of the California population is Caucasian, TODAY!

HISPANICS and ASIANS together, with their non-European food cultures, NOW comprise 49% of the population (37% and 12% respectively).

Source: 2008 American Community Survey

The Future: Follow the Money … All Eyes Towards Asia

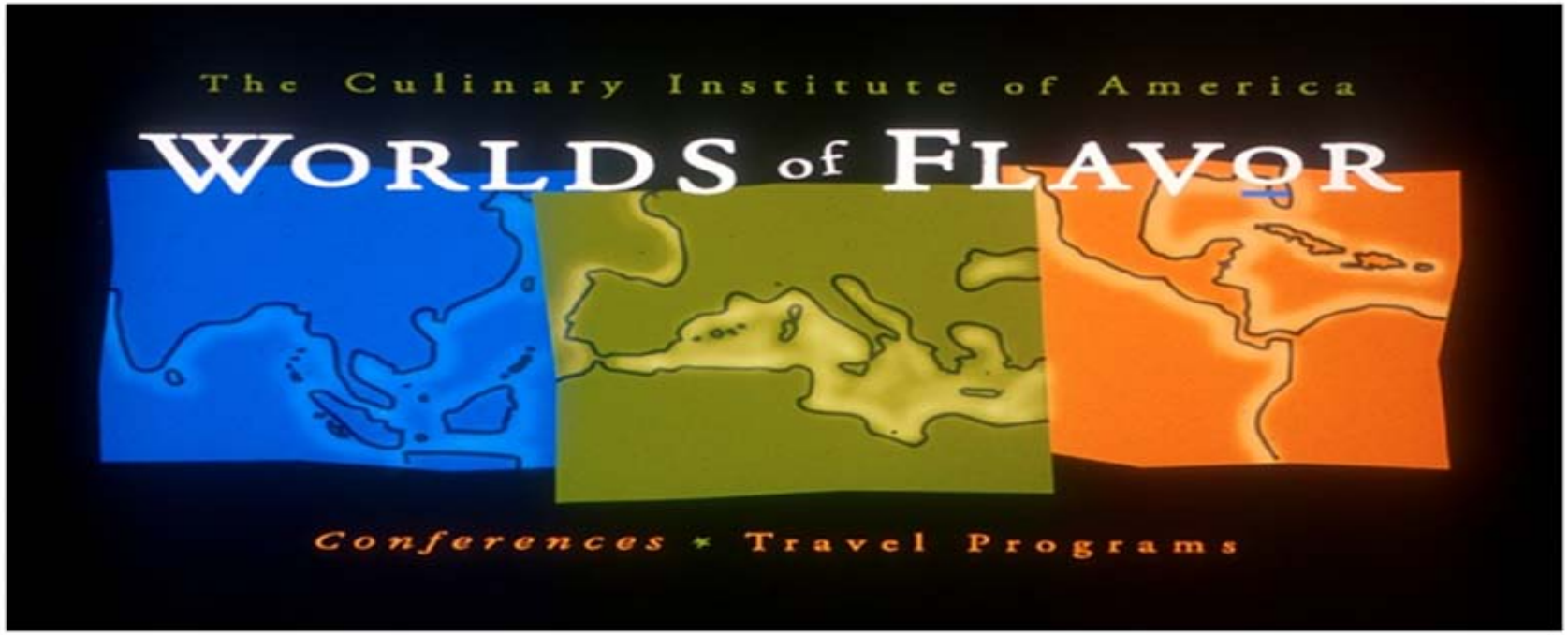
With the rise of **CHINA, INDIA**, and **SE ASIA**—economically, politically and culturally—U.S.-Asia exchange will see immense growth, and with that **OUR PALATES** will be further transformed.

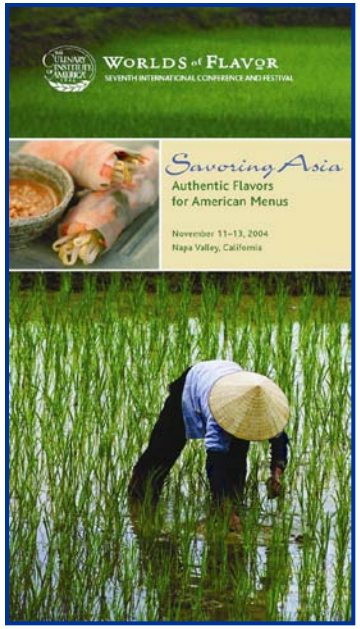
The Future:
Food Trends on Steroids

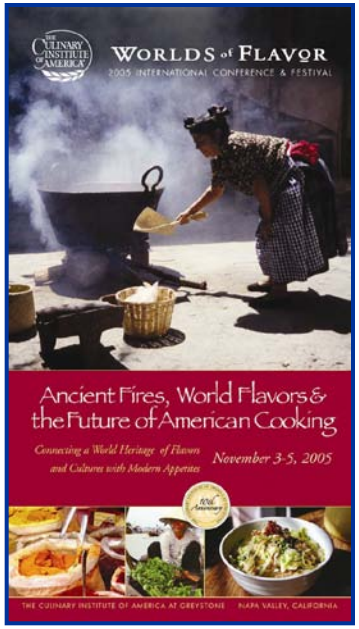
If you think the growth of interest in new flavors and world cuisines has been dramatic over the last 15 years, you haven't seen anything yet!

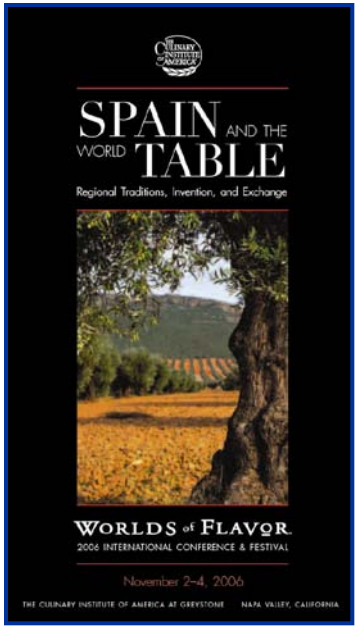
The rate of change is ACCELERATING.

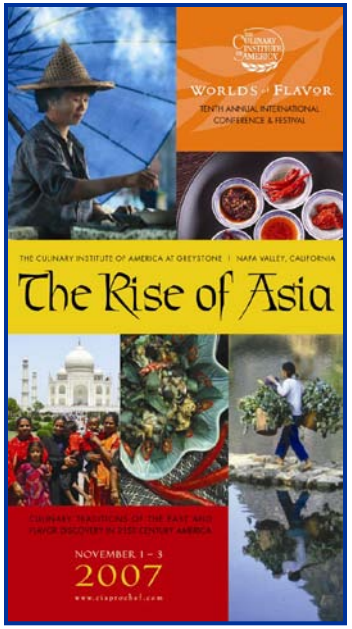
Global, adventurous palates…
in the age of the iPod

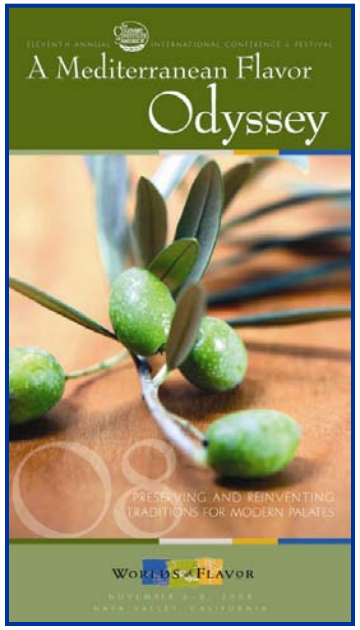

The Culinary Institute of America
WORLDS of FLAVOR
Conferences • Travel Programs


WORLDS of FLAVOR
SEVENTH INTERNATIONAL CONFERENCE AND FESTIVAL
Savoring Asia
Authentic Flavors for American Menus
November 11–13, 2004
Napa Valley, California


WORLDS of FLAVOR
2005 INTERNATIONAL CONFERENCE & FESTIVAL
Ancient Fires, World Flavors & the Future of American Cooking
Connecting a World Heritage of Flavors and Cultures with Modern Appetites
November 3-5, 2005
THE CULINARY INSTITUTE OF AMERICA AT GREYSTONE NAPA VALLEY, CALIFORNIA

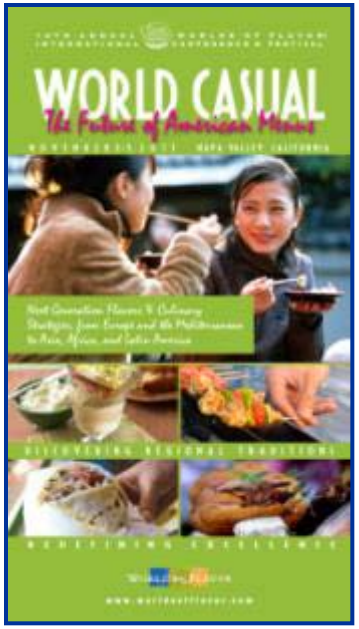

SPAIN AND THE WORLD TABLE
Regional Traditions, Invention, and Exchange
WORLDS of FLAVOR
2006 INTERNATIONAL CONFERENCE & FESTIVAL
November 2–4, 2006
THE CULINARY INSTITUTE OF AMERICA AT GREYSTONE NAPA VALLEY, CALIFORNIA


WORLDS of FLAVOR
TENTH ANNUAL INTERNATIONAL CONFERENCE & FESTIVAL
THE CULINARY INSTITUTE OF AMERICA AT GREYSTONE | NAPA VALLEY, CALIFORNIA
The Rise of Asia
NOVEMBER 1 – 3
2007


A Mediterranean Flavor
Odyssey
08
PRESERVING AND REINVENTING TRADITIONS FOR MODERN PALATES
WORLDS of FLAVOR

TWELFTH ANNUAL INTERNATIONAL CONFERENCE & FESTIVAL
FRONTIERS OF FLAVOR
STREET FOOD
WORLD
COMFORT FOOD
Discover the Fast Casual, Slow Savory, and "Big Value" Culinary Traditions of Asia, the Mediterranean, and Latin America
WORLDS of FLAVOR
NOVEMBER 12–14, 2009 NAPA VALLEY, CALIFORNIA

JAPAN: FLAVORS OF CULTURE
Sushi and Soba to Kaiseki
A Global Celebration of Tradition, Art and Exchange
NOVEMBER 4–6, 2010
2010
WORLDS of FLAVOR
NAPA VALLEY, CALIFORNIA
www.worldsofflavor.com


WORLD CASUAL
The Future of American Menus
DISCOVERING REGIONAL TRADITIONS
REDEFINING EXCELLENCE

A Mediterranean Flavor Odyssey

ELEVENTH ANNUAL INTERNATIONAL CONFERENCE AND FESTIVAL

Preserving and Reinventing Flavor Traditions for Modern Palates

The Culinary Institute of America, Napa Valley, California

TWELFTH ANNUAL THE CULINARY INSTITUTE OF AMERICA INTERNATIONAL CONFERENCE & FESTIVAL

FRONTIERS OF FLAVOR

STREET FOOD WORLD COMFORT FOOD

JAPAN: FLAVORS OF CULTURE

From Sushi and Soba to Kaiseki, A Global Celebration of Tradition, Art, and Exchange

13th ANNUAL INTERNATIONAL CONFERENCE & FESTIVAL

Connecting World Cuisines JUGGERNAUT with…

Health & Wellness Imperatives…

Addressing an obesity epidemic, incubating diabetes crisis, unsustainable health insurance costs…

The Culinary Institute of America

Harvard School of Public Health, Department of Nutrition

Worlds of Healthy Flavors

BRINGING TOGETHER THE BEST OF WORLD COOKING AND THE LATEST IN NUTRITION RESEARCH

Chain Restaurants & Other Volume Foodservice: Getting on Board

- Encouraging signs that customers are finally walking the talk—on wanting healthier food choices in restaurants…and **BUYING**!
- "We're seeing a **SEA CHANGE** in consumer behavior," Mike Archer, president of Applebee's (USA Today 4.13.11)
- CIA-Harvard WOHF initiative had pivotal role in driving trans fats out of the food supply

THE CULINARY INSTITUTE OF AMERICA

in collaboration with

NATIONAL RESTAURANT ASSOCIATION

Healthy Flavors, Healthy Kids

A National Initiative to Improve the Health of Children and Young People Through Food Education, Culinary Strategy, and Flavor Insight

NATIONAL INVITATIONAL LEADERSHIP SUMMIT

MAY 11-13, 2011 SAN ANTONIO, TEXAS

Healthy Kitchens, Healthy Lives™

Caring for Our Patients and Ourselves

Presented by

The Culinary Institute of America and Harvard School of Public Health

A Leadership Conference Bridging Nutrition Science, Health Care, and the Culinary Arts

Healthy Menus R & D Collaborative

- 25 of the most influential **CORPORATE CHEFS** in the country, working in **close, regular collaboration**
- Two key, early targets:

  --How to reduce **SODIUM**—a big issue for our industry

  --How to drive up **PRODUCE** usage and consumption

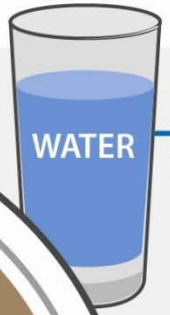
Fruits
Grains
Dairy
Vegetables
Protein
ChooseMyPlate.gov

PRODUCE: Half our Plates

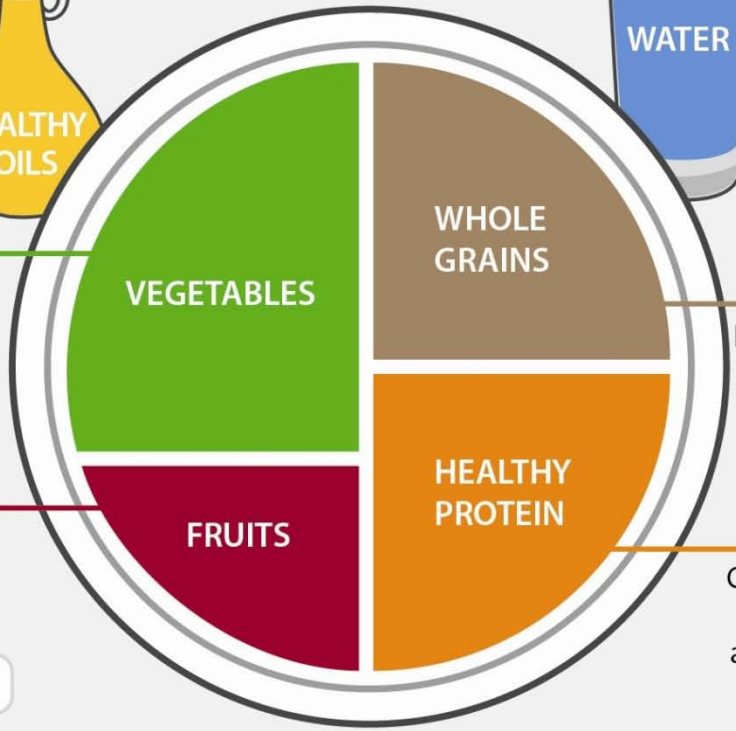
Chefs & foodservice now have **a clear national goal** for menu development

HEALTHY EATING PLATE

Use healthy oils (like olive and canola oil) for cooking, on salad, and at the table. Limit butter. Avoid trans fat.



Drink water, tea, or coffee (with little or no sugar). Limit milk/dairy (1-2 servings/day) and juice (1 small glass/day). Avoid sugary drinks.



The more veggies—and the greater the variety—the better. Potatoes and french fries don't count.

Eat whole grains (like brown rice, whole-wheat bread, and whole-grain pasta). Limit refined grains (like white rice and white bread).

Eat plenty of fruits of all colors.

Choose fish, poultry, beans, and nuts; limit red meat; avoid bacon, cold cuts, and other processed meats.

STAY ACTIVE!

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Harvard School of Public Health
The Nutrition Source
www.hsph.harvard.edu/nutritionsource

Harvard Medical School
Harvard Health Publications
www.health.harvard.edu

All Roads Lead to Rome: Produce & Other Plant-Based Food Choices

- Whatever the health challenge or opportunity—calories, sodium, saturated fat, antioxidants, taste appeal of healthy menu choices, etc.—**PRODUCE** is **THE** solution.
- If our industry could focus on **ONE** goal — **DOUBLING PRODUCE** by 2020—we could quickly get on top of our health imperatives, and make our customers happy at the same time!

The Culinary Institute of America

produce first!

American Menus Initiative

A FOODSERVICE INDUSTRY
LEADERSHIP PROGRAM TO PROMOTE
HEALTHIER FOOD CHOICES

2011
JANUARY 22
NAPA VALLEY – CALIFORNIA

Delicious, Craveable Produce-based Culinary Traditions

- In many world culinary traditions, animal-based protein was **SCARCE** and therefore expensive, so generations of talented **COOKS** developed whole repertoires of **IRRESISTIBLE** dishes based **LARGELY** on:

FRUITS AND VEGETABLES …and legumes, nuts, and whole grains…and smaller amounts of meat, dairy, etc.

Produce: World Flavors Strategy

From Italy, Spain, Greece and North Africa to Mexico and Southeast Asia--there is a "WORLD FLAVOR TRAIL" to be pursued in support of the healthy menu R & D process.

How Good? How Likeable?

- "Good tasting" healthy **food—NOT GOOD ENOUGH!**
- Must be **CRAVEABLE**, fun, exciting...memorable!

What's On the Menu?

- A Turkish whole grain bulgur salad with chopped vegetables, herbs…and an olive oil-based vinaigrette
- Whole grain pasta with garlic, greens, chickpeas, and olive oil
- Southern Mexican chicken with mole (mole: sauce of ground chilies, nuts, fresh and dried fruit, spices dark chocolate; choose vegetable oil, not lard)

Hungry Now?

- Lentil dal with fresh ginger, green chilies and cilantro….or stir-fried cabbage with South Indian spices…or pear-raisin chutney
- Asian stir-fry with green beans and small amounts of beef
- Latin ceviche with seafood, avocado and citrus
- Thai vegetarian "jungle curry" with squash & broccoli
- Grilled asparagus with Spanish red pepper sauce

But we need to know more…

"L.A schools healthful lunch menu panned by students…

--Los Angeles Times 12.7.11

Was it because…

- Students don't like healthy food?
- Poor food/recipe concepts?
- Lack of training?
- Misses in operational implementation?
- Student won't eat unfamiliar flavors?

"The food was **'super good'** at the summer tasting, but in [roll out] the chicken posole was watery, the vegetable tamale was burned and hard, and the noodles were soggy"

--Andre Jahchan, *16-year old sophomore at Esteban Torres High School*

Healthy Flavors Research Initiative
Connecting and advancing culinary, sensory and consumer insight on behalf of healthier food choices

The Culinary Institute of America
UC Davis—Foods for Health Institute

Healthy Flavors Research Initiative

"Shift food intake patterns to a more plant-based diet that emphasizes vegetables, cooked dry beans and peas, fruits, whole grains, nuts and seeds."

--Report of the 2010 Dietary Guidelines Advisory Committee

Rucola
Rucola
FRUTTA SCELTA

Huge Opportunities for California's Produce & Nut Sectors, but…

- Don't think that just **TELLING PEOPLE** to eat more fruits and will make it so
- Need greater collaboration up & down **SUPPLY CHAIN** —especially on **FLAVOR**
- Produce companies need to hire and work more closely with **CHEFS**; volume foodservice **CHEFS** need to get in to the **FIELDS**.
- Biggest opportunity: **Culinary R & D** on **NEW MENU ITEMS**

Produce Solutions: Menu R & D

- **YALE** University salad bar innovation a potent case study
- Grouping salad bar ingredients by flavor palate and **CUISINE PATTERN**, and driving up produce usage by 10% plus.
- We have to get into the **"MECHANICS OF INNOVATION"** -- not just talk broadly of goals

Produce, Nuts & "Creative Disruption" -- Menu R&D 2012

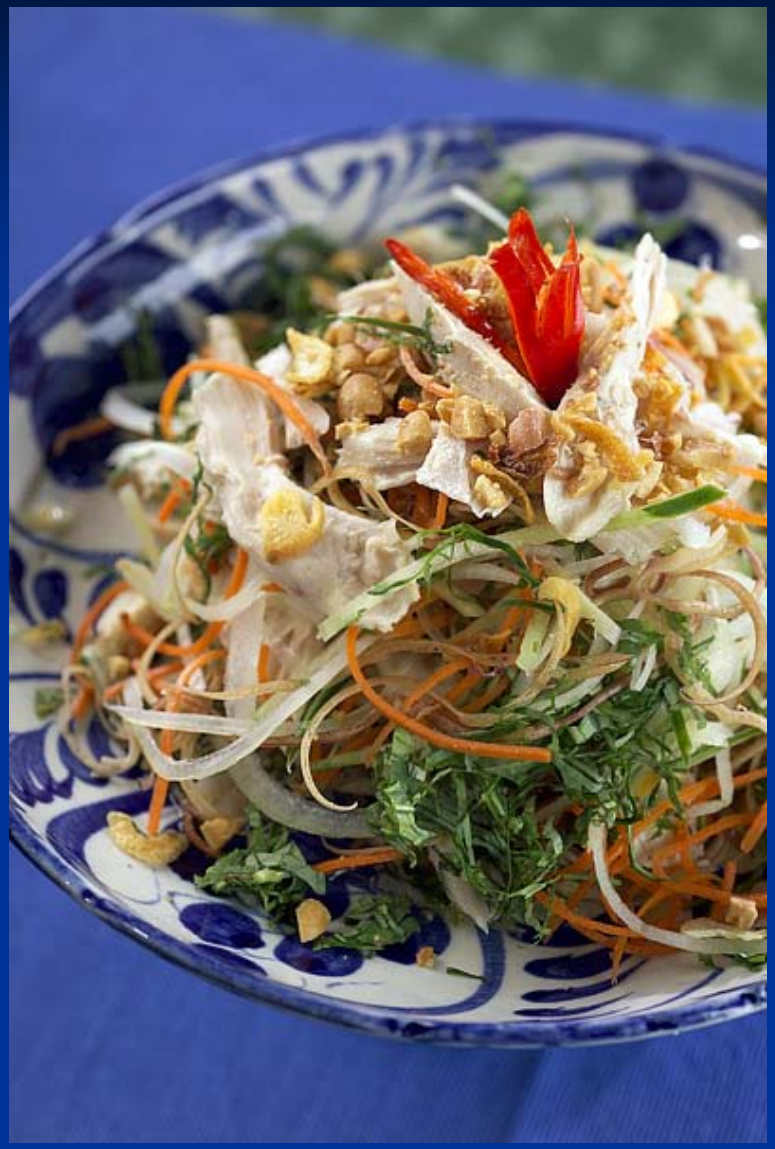
- Salt: Produce cuts sodium issue in two ways
- Calories/calorie regulations: re-imagining the plate in terms of bulk quantity and flavor
- Long-term trajectory for animal protein prices with global demand (esp. China) for commodities (Darden protein/produce strategy)
- Meatless Mondays/Flexitarians—beyond the "old" vegetarian labels
- Nuts continue to get stellar results in nutrition research—and yet this has barely penetrated professional thinking and culinary R & D world

Produce, Nuts & "Creative Disruption" -- Menu R&D 2012-2020

In order to fully leverage **market opportunities**, California PRODUCE AND NUT SECTOR leaders must be able to envision:

-- What our "globalized, hyper-connected" palates looks like in 2020, 2030, and 2050 ('exotic" goes away)

-- How to bring culinary insight center-stage into every decision from what to plant, how to grow, to how to deeply connect with culinary opinion/thought leaders.



A Delicious, HEALTHY Future For Our Industry and Customers?

Yes, if we develop a NATIONAL commitment to make produce, whole grains and other plant foods the CULINARY STARS that they deserve to be.

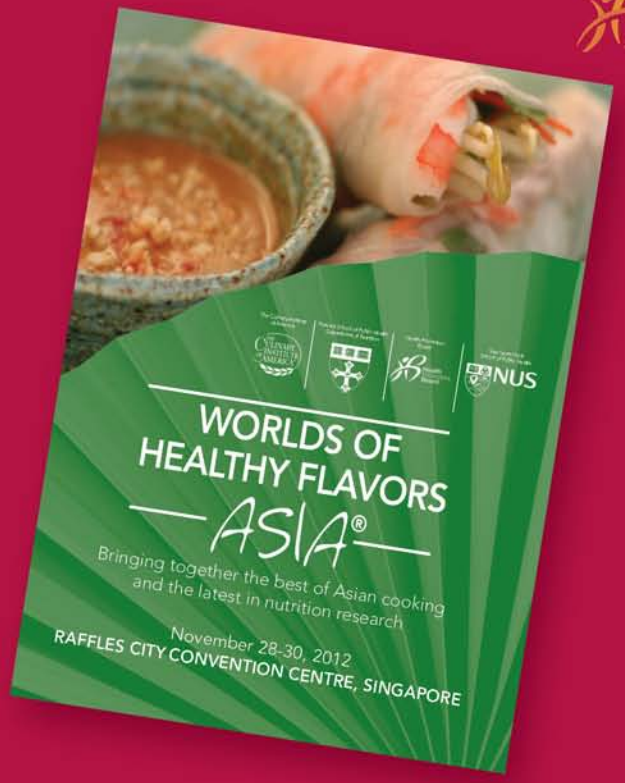
THE CULINARY INSTITUTE OF AMERICA,
HARVARD SCHOOL OF PUBLIC HEALTH — Department of Nutrition,
SAW SWEE HOCK SCHOOL OF PUBLIC HEALTH, National University of Singapore
and HEALTH PROMOTION BOARD, Singapore

1ST ANNUAL

WORLDS OF HEALTHY FLAVORS ASIA

Annual Invitational Leadership Conference and Educational Initiative for Foodservice and Healthcare Leaders

November 28-30, 2012
RAFFLES CITY CONVENTION CENTRE, SINGAPORE



And very briefly…

This entire calculus gets further shaped by the rising tide of passion about **SUSTAINABILITY & FOOD ETHICS**.

Sustainability and Food Ethics

- Our students—college students everywhere—wants to know **WHERE** our food comes from and **HOW** it is produced
- And increasingly, so do our customers
- **Flavor, Quality and American Menus** – top volume foodservice operators experience CA agriculture with UC Davis & Center for Land Based Learning

THE CULINARY INSTITUTE OF AMERICA
UC DAVIS
2011
EIGHTH ANNUAL INVITATIONAL LEADERSHIP FORUM
Flavor, Quality & American Menus

Coming this spring…

- **CIA Sustainable Business Leadership Council**

  And a new national initiative:

- **MENUS of CHANGE:** ***The Business of Healthy, Sustainable & Delicious Food Choices***

  …looking at the long-term convergence of key trends and opportunities at the intersection of business, economics & the culinary arts

We invite your collaboration.

THANK YOU!

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