



The Journal



Top Food Trends 2025



Napa's most popular wineries. Sattui vying to be the region's next great food destination



OscarTek Display Cases at Sattui winery as an integral part of the remodel

Napa Valley, St. Helena October 1st, 2025 Over the past year, one of Napa Valley's most-visited wineries has been a shell of itself. V. Sattui Winery underwent its first major renovation in 50 years, closing the popular tasting room and deli, and relegating many guests to lackluster trailers. Much of the winery's famed picnic grounds were under construction, too, which tainted the experience and significantly limited the number of people the winery could host each day.

"Sales reduced dramatically," said V. Sattui founder Dario Sattui, who also owns Castello di Amorosa, the 13th-century Tuscan castle in Calistoga that's Napa Valley's top tourist attraction."

But now, V. Sattui's renovation is wrapping up and the winery is primed for a major rebound, having just opened its new, 8,000-square-foot market, deli and tasting room complete with epic food offerings: Think over 200 cheeses, savory s'mores and vegan foie gras from a chef who runs a Michelin-starred restaurant.

Many of Napa Valley's most classic estates have undergone expensive and modern transformations in the past decade, but V. Sattui's is notably more modest in comparison, and the winery hasn't raised prices, said winery president and managing partner Tom Davies. This embodies V. Sattui's continued commitment to accessibility at a time when Napa Valley is widely considered too pricey and exclusive. Sattui has repeatedly resisted Wine Country trends: V. Sattui was one of the last wineries in the region to start charging for tastings - beginning at just \$5 in 2007 - and despite being labeled a "gateway" or "Disneyland" winery by wine industry critics, it remains walk-in- and family-friendly. It also produces more than 50 different wines, including entry-level bottlings that, yes, are on the sweeter side.

For decades, Sattui had dreamed of restarting his great-grandfather's winery, which operated in San Francisco from the 1880s until Prohibition. He came to Napa Valley with just \$5,000 of his own money and managed to raise a total of \$62,500 to launch the winery, even convincing a realtor to buy the land and lease it to him. Sattui "skimmed" on expenses wherever he could. His brother-in-law installed the roof of the original winery building, which he built for just \$15 a square foot. He made all of his long-distance calls collect, and his desk consisted of a \$3 "reject door" from the local lumber yard set atop two wine barrels. He crunched numbers with his grandfather's hand-crank calculator and often slept in the winery or his van.

The next year, Sattui added tastings, setting up a small bar and deli counter among the barrels of the winery. It was one of the first Napa Valley wineries to offer food, and the deli was a revolutionary concept at the time. Sattui said he paid \$200 for "an old, rusty deli case" and covered it in redwood. He couldn't afford a cash register, so he wrote every sale down by hand and collected money in a wooden box. On opening day, the winery made \$141; on the second day, \$180. "My wife said, 'I told you we'd go broke,'" Sattui recalled, adding that for the first seven or eight years, he worked seven days a week. "I had no money, no knowledge."

In 1985, Sattui completed construction on a new winery facility, which enabled the tasting room and deli to expand. And around the same time, his creativity began to pay off. In addition to the deli, V. Sattui was one of the first Napa Valley wineries to allow picnicking and to host weddings. The winery was also the second in Napa Valley to launch a wine club, and started shipping wines out of state long before it was legal. The winery would load up wine on a Greyhound bus in Yountville, and club members would pick up orders from bus stops across the country. Later, V. Sattui would keep a low profile by printing "Bay Area Electronics" as the sender on the label.

For a while, "tourism was bleak," Sattui recalled. "There were no good restaurants and there weren't a lot of hotels." A shift began in the late '80s, and V. Sattui would regularly see over 100 people a day on weekends. Then in 1991, "60 Minutes" aired a segment on the French Paradox, the idea that a typical French diet, including red wine, reduced the risk of heart disease. The segment is often credited for kickstarting the 25-year American wine boom. "It really seemed to explode after that," said Davies, who has been Sattui's right-hand for 46 years. (His job interview took place over a game of ping pong, and he started at \$5 an hour.) Before the renovation, Davies said V. Sattui would regularly see 1,500 people on a Saturday. Unlike most Napa Valley wineries, V. Sattui can host weddings, allow picnicking and operate a deli because one acre of the property is zoned for commercial use instead of agricultural use.

The new building, named Mercato del Gusto, is now a destination in and of itself, and rivals Napa Valley's legendary Oakville Grocery, located less than five miles south on Hwy 29. V. Sattui expanded the open, barn-like structure by 28 feet, which more than doubled the size of the deli and marketplace, and created a vaulted ceiling. The stucco has been replaced by stone, and new windows brighten the previously dark space. The interior is simple - wood floors, stone walls, redwood beams and bright chandeliers - yet, at the same time, overwhelming. Visitors are greeted by counters and fridges stocked with prepared foods, pantry staples and picnic supplies, including olive oils, gelato and desserts. On the right, cheese mongers hand out free samples from a massive wall of over 200 cheeses sourced from around the globe. The deli is on the left, offering more than a dozen sandwiches, salads, pastas and barbecue items on weekends from former Michael Mina chef Jefferey Lloyd. There's a selection of antipasti, including stuffed olives and pickled okra, and specialty items, like bacon-wrapped dates and fried macaroni and cheese bites. A meat case is filled with charcuterie, including V. Sattui's housemade bresaola - also available in panini.

As visitors move through the Mercato, they'll happen upon a wine shop and then four tasting bars. The centerpiece is a massive and energetic round bar that can seat up to 24 people. V. Sattui has arguably the most diverse wine lineup in Napa Valley (bottles cost \$29-\$185), sourcing from over 200 acres of estate fruit throughout Northern California, plus additional vineyards. The wines include an unconventional white blend of Chenin Blanc, Albarino and Pinot Grigio; a Riesling from Napa's Mt. Veeder; and a dozen single-vineyard Zinfandels. "To have a Riesling from Napa Valley, and Mt. Veeder, is unheard of," said V. Sattui winemaker Jason Moravec. "Most other wineries would have ripped it out a long time ago and planted Cabernet."

The winery is also looking to attract younger generations of drinkers with a pair of natural wines, a Lambrusco-inspired sparkling wine blend of Malbec and Syrah - which Davies said was specifically created to pair with hamburgers - and a non-alcoholic Gewurztraminer. Tastings start at \$45, but the winery just launched free flights, featuring three wines, on Tuesdays and Thursdays. V. Sattui also started a by-the-glass program, onto which visitors can add food pairings. Created by V. Sattui's executive estate chef Stefano Masanti, who also owns a Michelin-starred restaurant in the Italian Alps, plates (\$10 each) include vegan foie gras, veal cheek with potato cream and branzino tartare. Guests can also opt for the chef's choice pairings (\$27 for three plates, \$40 for five), which make for a solid lunch.

Upgrades are also available for tasting flights, including a cheese and charcuterie-inspired s'mores pairing for two (\$20). Guests can toast their own cheesy marshmallows over tabletop fuel cans. "It's like a cheese plate and s'mores had a baby," said Davies White Ln., St. Helena. [vsattui.com](https://www.vsattui.com)

Top Food Trends 2025

The food and beverage industry continues to evolve, shaped by changing consumer preferences and global trends. Each year, through extensive 360 research, Innova releases the Top Ten Trends for the coming year. This includes launch categories, product attributes, ingredient choices, and on-package claims, aiming to predict the future direction of the global food and beverage market for the year ahead.

Drivers Affecting Food and Beverage Trends

There are several global factors that impact food and beverage trends. One major influence on these trends is megatrend drivers, which include political, economic, sociological, environmental, and technological factors leading change worldwide. Examples of megatrend drivers are building a sustainable future, continuous technological disruption, demographic and social change, economic and political volatility, and focus on health and wellbeing.

Consumer macrorends, such as consumer lifestyles, attitudes, and consumption behavior, are reflected in their priorities. They increasingly value self-sufficiency, demand quality and integrity from brands, and seek authentic connections. They prioritize feeling positive and embrace transformational experiences, aligning their choices with their personal values and aspirations. These consumer macrorends are also influencing the food and beverage industry. All these drivers indicate future innovation possibilities for the food and beverage industry, as highlighted in Innova's annual Top 10 Trends.

Global Megatrends Impacting Industries and Consumers global megatrends 2025

Trend #1 – Ingredients and Beyond

Innova's trends research shows that consumers are increasingly seeking value from high quality ingredients. The "Ingredients and Beyond" food trend is about product differentiation through ingredient quality. Consumers are prioritizing ingredients with elevated features such as health benefits, nutrition, freshness, shelf life, and naturalness when choosing food and beverage products. This emphasis on quality significantly influences purchasing decisions, with 61% of consumers noticing a product quality of store and supermarket brands.

Quality of product is the most significant factor for consumers across all generations, although priorities vary. Protein exemplifies this trend, as the focus shifts from mere protein content to protein quality, with elevated standards that incorporate additional benefits.

Good value for money and quality increasingly align as inflation reshapes consumer expectations. Manufacturers are enhancing product quality to offer cost-effective options that still meet consumer preferences. By improving ingredient standards and emphasizing quality through storytelling and compelling visuals, brands can attract value-conscious consumers and guide them to make informed choices.

Trend #2 – Precision Wellness

Consumers are increasingly proactive about their health, leveraging nutrition as a tool to manage specific health concerns. The growing demand for personalization highlights the effectiveness of tailored nutrition plans, driving this trend. The 'Precision Wellness' food trend highlights that information culture is challenging brands to meet targeted nutritional needs at any life stage. It combines personalization with balanced nutrition and convenience in functional food and beverage products.

Globally, weight management is the top physical health concern for consumers, boosting a 10% growth in new product launches with weight management claims over the past year. Women's health, age-specific solutions, lifestyle-based nutrition, and performance nutrition are a few key growth areas in precision wellness. Brands have an opportunity to address gaps in targeted nutrition by developing innovative solutions. They are likely to pursue targeted nutrition through regular food and beverages, supplements, and fortified products that can cater to specific needs at any life stage.

Trend #3 – Flavors: Wildly Inventive

Consumers are seeking bold and extraordinary food and beverage experiences, with 43% globally looking for unique creations that deliver ultimate indulgence. The 'Wildly Inventive' food trend highlights this craving for extraordinary experience, driving companies to create surprising mash-ups and flavors that attract and delight.

Due to social media, consumer curiosity about exciting flavor combinations often gains attention online. Seasonal and limited-edition flavors significantly influence choices, as reflected in 16% average annual growth in products with limited-edition claims over the past five years. Consumers are interested in cross-category mash-ups such as dessert mash-up, snack and main course mash-up, and savory and sweet combinations. This fusion of indulgence and creativity opens doors for brands to explore unique combinations that not only excite but also create memorable experiences for consumers.

Trend #4 – Gut Health: Flourish From Within

Post-pandemic, consumers are refocusing on gut health, making it a key driver of functional food and beverage purchases. The food trend 'Gut Health: Flourish From Within', highlights growing awareness of the microbiome, creating space for ingredients like fiber. Product launches with digestive health claims have increased by 8% in the past year, indicating strong demand.

The top ingredients in functional food and beverages for gut health are fiber, vitamin D, and probiotics. Digestive health is more desirable in older generations. Gut health benefits are intricately linked to healthy aging, with claims like bone health, immune support, and weight management experiencing significant growth. To capitalize on this food trend, innovators can expand gut health benefits across various categories like sweet biscuits, cereals and energy bars, and coffee. This can cater to the rising consumer desire for convenient, multifunctional products.

Five Consumer Trends Framing our F&B Trends for 2025 five consumer trends 2025

Trend #5 – Plant Based: Rethinking Plants

This food trend has been an enduring one over the past several years globally. Consumers are not 100% satisfied with today’s plant-based offerings. They want more natural, less processed options with improved taste, texture, health benefits, and environmental impact. This ‘Plant Based: Rethinking Plants’ food trend shows that consumers are rerouting towards natural pursuits of plants in real and recognizable form.

Fava bean is a trending plant protein, while almond and lentil protein are emerging in the market. Companies are exploring a cleaner approach to innovating with plant-based products that do not mimic meat or dairy and offer simpler formulations, less processing, and attractive pricing. Plant based is expected to adapt well-known dishes and formats while incorporating fresh ingredients that enhance their natural appeal.

Trend #6 – Sustainability: Climate Adaption

Innova’s trends research among consumers demonstrates a rising concern for the planet. The ‘Sustainability: Climate Adaptation’ food trend highlights how brands and consumers align personal values with product choices to address climate challenges. This links consumer awareness to manufacturers’ sustainability efforts. Almost half of consumers globally are extremely aware of the impact of climate change. They support actions like sustainable farming, climate-resilient crops, and novel cultivation technologies.

Climate change impacts on crops like cocoa, coffee, and olive oil drive brands to innovate with alternatives and new formulations. Price is the top aspect most affected by climate change according to consumers globally. Brands can balance affordability with sustainability and highlight their efforts to empower consumers to make informed, eco-conscious choices.

Trend #7 – Taste the Glow

The ‘Taste the Glow’ food trend reflects consumers’ growing interest in beauty-enhancing food and beverages, driven by the booming cosmetic industry. Globally, 1 in 5 consumers has purchased products to improve their physical appearance in the past year. Younger generations drive purchases in food and beverage for skin health. Over the past five years, product launches with skin health claims have experienced a 15% growth. Consumers are looking for bottled water, nuts and seeds, and supplements in categories with skin health claims. Vitamins are a key ingredient driving this growth, presenting opportunities for brands to innovate with products targeting facial skin, hair, and body skin.

Trend #8 – Food Culture: Tradition Reinvented

The food trend ‘Food Culture: Tradition Reinvented’, reveals a growing consumer desire to reconnect with culinary heritage and embrace authenticity and tradition. Nearly half of global consumers value food trends that reflect their culture and diversity as important values in their diets. Bringing one country’s traditional flavors to another satisfies the demand for authentic global cuisines, offering consumers a taste of different cultures. Made with local ingredients, familiar flavor profiles, and prepared with traditional cooking techniques are the top 3 most important aspects in traditional food and beverages for consumers globally.

Brands are tapping into consumers’ nostalgia by reintroducing old recipes, appealing to the 65% of consumers who want more traditional options on supermarket shelves. Categories like sauces, seasonings, and toppings, soups, and bread and bread products are key areas for innovation for traditional flavors.

Trend #9 – Mood Food: Mindful Choices

Consumers are increasingly prioritizing mental health, with 36% globally identifying emotional wellbeing as their primary health goal. The ‘Mood Food: Mindful Choices’ food trend highlights the growing demand for products that support mental and emotional wellbeing. However, an opportunity gap exists between consumer high attention to mental health and the low association with functional food and beverages.

Key ingredients like vitamins B6, B9, B12, C, D, E, and magnesium are gaining attention for their mood-enhancing benefits. Over the past years, products with brain-health claims featuring vitamin B have experienced a 51% rise in launches. Beyond vitamins, botanical ingredients are emerging as effective stress-relief solutions. Brands are likely to tap into indulgent innovations to uplift mood, offering consumers more ways to support their mental wellbeing in the coming year.

Trend #10 – AI: Bytes to Bites

The ‘AI: Bytes to Bites’ food trend displays that brands are beginning to unlock the full power of AI. They are moving from infinite capabilities to concrete applications that elevate consumer experiences. There has been an exponential growth in food and beverage with an artificial intelligence-related claim.

The beverage market takes the lead in highlighting the role of AI to consumers, as companies begin unlocking its potential. AI is increasingly used to accelerate product innovation, identify ingredients, develop formulations, create flavors, automate production, ensure food safety, and promote sustainability.

Innova’s trends research predicts significant AI-driven disruptions in the coming year, with brands highlighting the benefits of AI in their communications and product claims. This growing integration of AI is likely to redefine innovation and consumer engagement in the food and beverage industry.

