

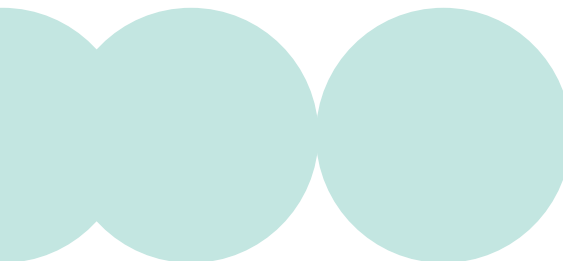
Margarine & Butter Spreads

2026

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General Insights



42% of consumers say they are willing to pay more for premium spread products.

Source: Innova

71% of consumers say quality of ingredients is the primary driver of food purchase decisions.

Source: Proprietary dsm-firmenich insights

Premium spreading consumption aligns with the trend of shifting towards “experiences”.

Overview

The margarine spreads & butter category is evolving as consumers look for products that balance great taste, everyday functionality and better for you benefits. From familiar buttery profiles to blends featuring olive, avocado and other plant oils.

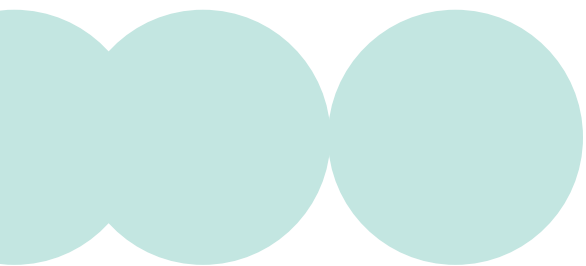
Across retail and foodservice, opportunity is growing around cleaner formulations, nutritional benefits and flavor-forward solutions that make spreads work harder throughout the day.

71%

Of respondents say
TASTE / FLAVOR is
the most important
factor when
choosing spread

Even as consumers are seeking cleaner labels & BFY formulations, TASTE is top of mind.

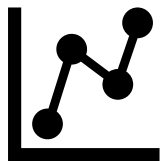




Flavor Innovation

Butter Culture

#butter #compoundbutter



Butter content has generated **297 million views on TikTok**, with “make butter from scratch” trending across Instagram and Pinterest.



#homemadebutter has seen **93 million viewers**, while “butter board” and “whipped butter” content continue to grow across social platforms.



60 second homemade butter trend.



How to Make Butter in a Jar



Trending!

Making butter at home has become a social media ritual, as consumers embrace hands-on cooking, clean ingredients, and customizable flavor. From mason-jar shaking methods to stand-mixer whipped butter tutorials, creators showcase the transformation from cream to butter in real time.

Bread & Butter

The dynamic duo that started it all.



At Home Sourdough

The surge in **at home sourdough baking** has reignited interest in butter as a premium finishing ingredient. As consumers invest time in artisanal bread baking, they are also upgrading the accompaniments, turning to cultured butter, brown butter, and flavored compound butters to elevate simple bread experiences.



Social media continues to amplify this behavior, with creators frequently showcasing butter pairings such as whipped butter, honey butter, and herb-infused spreads. This digital food culture reinforces butter as an indulgent finishing element rather than just a cooking fat.

Younger consumers are driving growth through culinary exploration particularly in cultured or flavored butters as bread pairings.

#sourdoughtiktok
has 8 million views+



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Foresight Tells Us... Product Development Reveals a Bigger Picture

Coffee experimentation from food, blends, concentrates, and cascara

Caffeinating non-traditional products

tiny feast



Caffeinated foods have energy being delivered in new ways beyond flavor



goop

Herbs with coffee blend powders, coffee that does more than flavor
Coffee flavor with benefits

La Colombe Coffee



Stumptown Coffee



Concentrated coffee flavors from cold brew, high impact coffee flavor and make-your-own




Blue Bottle

Coffee fruit Cascara on the rise, in sodas to butter for toast at Blue Bottle Café

Cascara is the fruit of the coffee, it has a floral flavor and brings a small amount of caffeine to foods and beverages

Butter Beverages

Inspiration from trending drinks

From coffee to tea to matcha drinks, butter delivers **rich mouthfeel**, **sustained energy**, and **indulgent flavor** that resonates with consumers seeking comfort with a flavor punch.

Butter Drink Trends

- Functional coffee drinks like butter coffee deliver **sustained energy and satiety**.
- Butter adds **creaminess and indulgent mouthfeel** to hot and cold beverages.
- Local shops and RTD brands are expanding butter drinks into **premium and functional beverage innovation**.



PICNIK Butter Coffee RTD



Bulletproof Coffee RTD



Main Claims

support feeling full longer, high energy beverage, slower caffeine crash

The trend gained traction through butter coffee and functional wellness drinks, but is now evolving into broader beverage innovation including brown butter lattes, clarified butter tea, and butter infused cocktails.

These drinks highlight butter's ability to create silky texture, depth, and a premium finish, making it a popular ingredient for elevated beverage experiences.

Beef Tallow

Trend Alert

Consumers are shifting toward traditional, minimally processed ingredients, driving renewed interest in beef tallow as a clean label alternative to seed oils.

The Felix bar in San Francisco, Pho Wimme is a fat washed rye drink with spiced beef tallow

STEAK N SHAKE
100% Beef Tallow
100% BETTER FRIES

Beef tallow in fries and burgers is a cornerstone of Steak n Shake



#TallowTok is a driver for the trend with Gen Z & health focused tapping in #seedoilfree #beeftallow



Beef tallow is being used in lip, face & body moisturizer, often paired with honey.



39%

Of Gen Z consumers say they avoid seed oils when shopping for food and drinks
29.4% of the total US market says the same



Realgood
FOODS CO.

Realgood foods are made with beef tallow to keep "seed oil free" label on chicken, prepared meals and handhelds



Beef tallow in retail fries, refried beans & more



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State Fairs

& Dairy Delicacies

State and county fairs have transformed butter from an ingredient into an indulgent centerpiece. What began as deep-fried novelty has evolved into a platform for bold, craveable flavor experiences that drive trial, nostalgia, and social sharing.



Social media is going crazy for “overindulgence” with deep fried butter to Oreos, butter remains a key ingredient in most fair foods.



Deep fried butter on a stick



Buttered sweet corn on the cobb



Butter sculptures

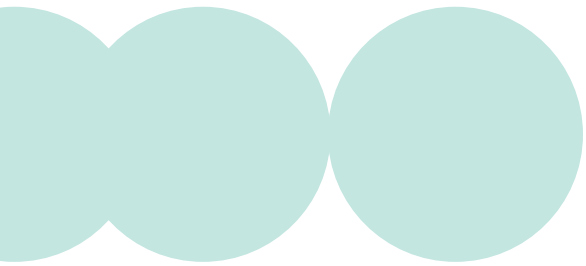
Why Butter Wins at the Fair

- High fat carrier amplifies bold flavor and indulgence
- Melting visuals + drizzles perform strongly on social media
- Nostalgia meets excess indulgence



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Spread Trends & Innovation

Commodity to Craft

Not your traditional table butter

70%

Of Gen Z consumers
discover new
restaurants via social
platforms



Butter is shifting from a default table staple to a curated culinary choice. Cultured butter, high butterfat European styles, grass-fed positioning, and small-batch production elevate perception.

Compound butter trends

- Compound butter as a signature sauce on proteins
- Cross cultural mashups that feel comforting but still novel
- Premium and elevated flavor with low complexity

Compound butter blends butter with herbs, spices, sweeteners, fermented ingredients, or aromatics. It functions as a finishing element, glaze, sauce replacement, or flavor carrier.



Sweet & Savory

New concepts in traditional spreadable formats

Spreads are crossing the line between **sweet and savory**, pairing familiar creamy formats with **heat, fruit, herbs, smoke and umami** for more craveable flavor experiences.



Trending Flavors

Smoked

Oak, Hickory, Mesquite



Salt Forward

Fluer de sel, Sea salt, Brown butter salt crystals



Sweet Heat

Hot honey, Maple chili, Gochujang



Herbed & Infused

Basil lemon, Spicy dill pickle, Rosemary infused



Shifting from a background ingredient to a **flavor driver**, butter is used as a finishing drizzle, swirl, whipped spread, or infused compound centerpiece.

1 in 3

Consumers show interest in trying sweet-savory flavor combinations

Spreading, Dipping, Melting

Butter with a twist, inspiration from across the globe

Spreads are becoming **multi-use flavor boosters**, moving from the breakfast table into snacking, cooking and finishing. New formats invite consumers to **dip, melt, drizzle and cook** with bold flavor in an easy, familiar format.



Trending Formats

- **SPREAD IT**

Toast, Sandwiches, Wraps, Crackers

- **DIP IT**

Bread, Veggies, Fries, Shareables

- **MELT IT**

Steak, Seafood, Vegetables, Pasta

- **DRIZZLE IT**

Pizza, Popcorn, Potatoes, Bowls

- **COOK WITH IT**

Sauté, Sear, Baste, Roast

Flavor-forward spreads can move seamlessly from **breakfast to sharing to cooking and finishing**

68%

Of respondents are using MARGARINE for spreading on toast, bagels or bread

59%

Adding to sauces or recipes

54%

Finishing or topping prepared foods

Butter & Spread

Trending Flavors, Ingredients
& Styles

Honey Cinnamon
Cumin
Turmeric
Pumpkin Spice
Honey Chipotle
Yuzu Miso

Early

Peppercorn
Lemon Blueberry
Green Chili
Shishito Pepper
Honey
Olive

Emerging

Chili Pepper
Cinnamon
Scallion
Caper
Matcha
Lemon Garlic
Old Bay Seasoning

Trending

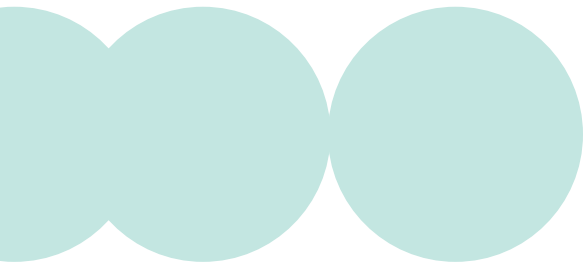
Garlic
Tomato
Truffle
Brown Butter
Parsley
Basil
Chive
Rosemary
Shallot
Thyme

Mature

Cilantro
Lavender
Herb

Plateau

BOLD = Growing YOY
Source: Tastewise



Spread Trend Pillars & Translation

Trends in Spreads

For 2026 & Beyond

The culture shift has moved spreads from **basic** to **intentional**.



Global Flavors

Margarine's versatile base makes it a canvas for **bold global flavors**, from chili and herbs to miso, curry, and culturally inspired seasonings.



Better For You

Consumers are looking for spreads that deliver **great taste with more intentional nutrition**, creating opportunity around plant-based oils and reduced saturated fat.



Elevated Indulgence

Margarine is moving beyond everyday utility with **richer textures and premium flavors** without leaving home.

Global Mashups

Butter with a twist, inspiration from across the globe

Butter is evolving into a global flavor platform. Consumers are bringing international pantry staples into everyday cooking, blending European dairy traditions with bold Asian, Latin American, Middle Eastern, and African flavor cues.

50%

Of US consumers express a desire to try flavors inspired by other countries



Trending Flavors

- Miso honey brown butter
- Gochujang garlic butter
- Harissa lemon butter
- Chimichurri herb butter
- Black garlic parmesan butter
- Za'atar cultured butter
- Tajín lime butter

Compound butter is a key vehicle for global mashups. By blending butter with spices, fermented ingredients, citrus, heat, and botanicals, brands can deliver accessible international flavor in a trusted dairy format.



Global Mashups

Market Translation BUTTER



Kerrygold Bell Pepper &
Garden Herb Butter



M&S Smoked Paprika &
Chilli Butter



HEB Garlic Parmesan
Seasoned Butter Dollops

Global Mashups

Market Translation MARGARINE



Coconut Ginger Margarine
~ Washington Post



**Vegan Friendly Cinnamon
Maple**



Challenge Snack Spread
Garlic Parmesan & Herbs

Better for you

And the planet

It's not just about eating less fat,
It's about choosing better fats.

Plant oils such as canola, sunflower and olive provide opportunities to formulate around unsaturated fats rather than animal-based saturated fats.

Vitamins D, E, B1, B2,
B6, B12, Folic acid



Pros in METABOLIC
health &
lower cholesterol

High Fiber
& Nutrients



50%

Of respondents say
"contains healthy or
beneficial fats" is
most appealing for a
spread

Vegetable-based spreads create a platform for **better-fat profiles, functional nutrients and plant-based positioning** without giving up familiar taste or versatility.

The opportunity lies in making the spreads work harder through nutrition & BFY claims.

Better for you

Market Translation MARGARINE



**Blue Bonnet Oil Spread
with Calcium & Vitamin D**



**Earth Balance Soy Free
Buttery Spread**



**Challenge Spread with
Pure Avocado Oil**

Elevated Indulgence

Sensory richness from home

Consumers are redefining indulgence through elevated at home experiences. Rather than dining out, they are recreating restaurant level richness in their own kitchens, prioritizing creamy texture, rich flavor and premium oil blends.

Why at home elevation?

Spreads are moving beyond basic functionality.

Whipped textures, premium oils, bold flavors and elevated finishes can transform a familiar margarine spread into a more indulgent experience.

62%

Of consumers say recreating restaurant style meals at home has become more important.

Olive Oil, Organic, Sauté, Bake



70%

Of consumers say indulgent at home meals improve their mood or emotional wellbeing.



Elevated Indulgence

Market Translation

MARGARINE / SPREADS



Miyoko's Salted Plant Milk Butter



Meijer Spreadable Butter with Olive Oil & Sea Salt



Challenge Spreadable Butter with Olive Oil

Formats & Conveniency

As consumers seek quick, flexible cooking solutions, packaging is evolving beyond traditional sticks into portable, portioned, and eco friendly formats that make everyday cooking easier.



As a result, margarine & butter are increasingly positioned not just as an ingredient, but as a ready-to-use flavor enhancer for cooking, baking, and finishing dishes.

In the past year, North America saw a five-year high in launches recyclable packaging (32%)

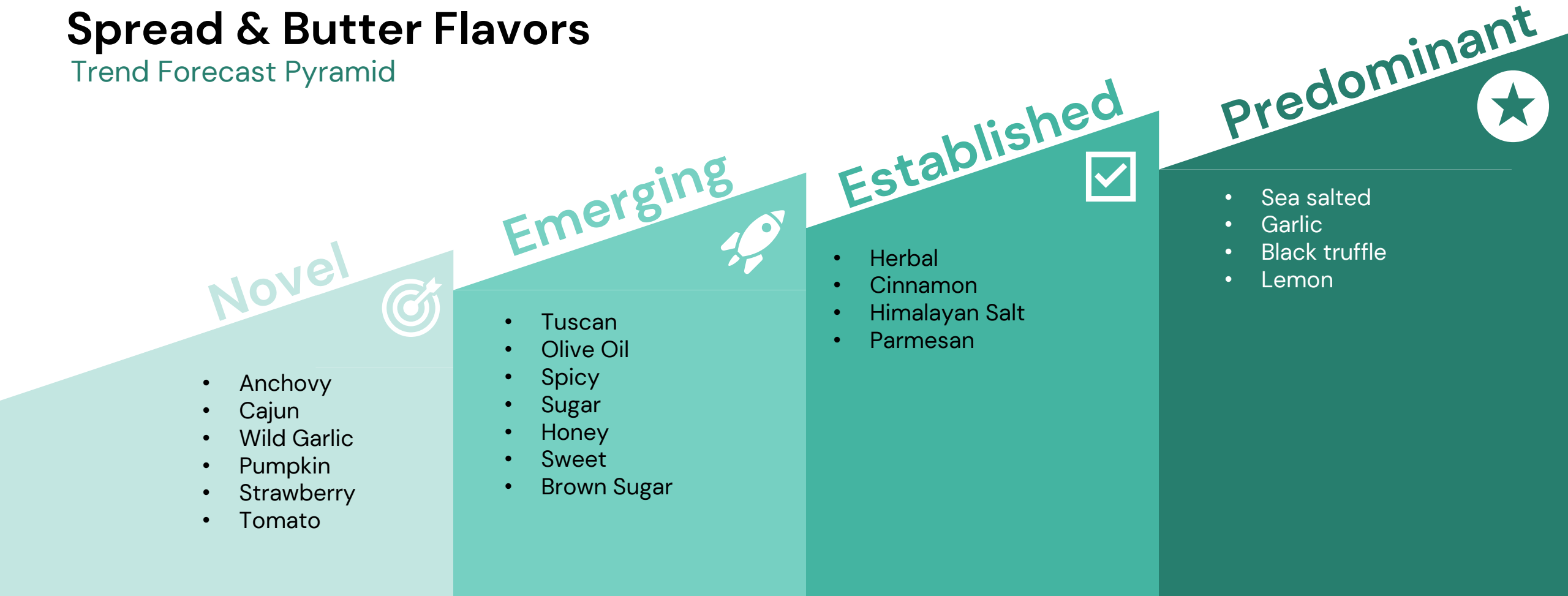
46%

Of butter / spread consumers say their biggest frustration is "too hard to spread when cold"

Wax free, pfas free butter parchment designed for sustainability

Spread & Butter Flavors

Trend Forecast Pyramid



We track flavor concepts from the very beginning, Novel ideas are brand new, as flavors trend and gain traction they move up the ladder and become established in the market. Flavors on the left are niche while those on the right are dominant.



- Anchovy
- Cajun
- Wild Garlic
- Pumpkin
- Strawberry
- Tomato



Cajun Garlic Butter



Anchovy & Lemon Butter



Pumkin Butter

Emerging

Market Translation

- Tuscan
- Olive Oil
- Spicy
- Sugar
- Honey
- Sweet
- Brown Sugar



Finishing Tuscan Butter



Honey Butter Flavored Spread



Salted Sweet Cream Spreadable Butter

Established

Market Translation

- Herbal
- Cinnamon
- Himalayan Salt
- Parmesan



**Parmesan, Garlic, Herb
Butter**



Cinnamon Maple Spread



**Lemon Herb, Cilantro
Lime & Scampi Butter**

Predominant

Market Translation

- Sea salted
- Garlic
- Black truffle
- Lemon



Miyoko's Salted Oat Milk Butter



Garlic & Shallot Butter



Italian Truffle Butter

We bring progress to life™