LS:N GLOBAL

THE : FUTURE : LABORATORY

Functional Feasting

Food and Drink Futures 2024–2025

Contents

03 Introduction
05 Drivers
10 Insight
18 Foresight
25 Strategic Implications

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Front cover and above: Single & Fat, US



Good Girls Snacks, US

Introduction

As we move past the ‘free from’ era, consumers are increasingly favouring products that do more with less, bringing flavour and fun back into functional nutrition

What people put on their plates is reflecting wider consumer behaviour; the food we eat is the result of informed choices, high expectations, but also actions that sometimes clash with intentions. Pressured by the cost of living crisis, many consumers struggle to afford kitchen staples and fresh produce; nutrition app **Lifesum** estimates that overall vegetable consumption has decreased by 5% since the pandemic globally.

But as putting food on the table has become more challenging, consumers find solace in little treats. The definition of comfort food is broadening, taking the shape of anything from protein-spiked chocolate to gourmet tinned fish. According to FMCG Gurus, 60% of consumers continue to indulge in non-essential purchases, driven by the need for escapism and mood boosts despite trying to reduce spending. The common denominator driving the future of this ’little treats’ mindset? Indulgence intended to be enjoyed without afterthoughts, guilt narratives, or moral value attached to food.

Despite seeking dopamine in their diets, consumers are increasingly health-forward in attitude. Echoing our **Total Tastes** macrotrend, this translates into eating to support mental wellbeing, physical performance and sleep quality, and can contribute to improving healthspan. In this new nutrition chapter, it is not about choosing between hedonism and health, but combining needs and wants into uncompromisingly flavourful options with built-in benefits.

Consumers will increasingly refocus on what they can add to their diets rather than what they can remove. One example of this is a growing reliance on supplement routines, which are increasingly lengthy and targeted to specific health and wellness goals. In 2022, our **Accredited Beauty** report explored how proof points on product quality, efficacy, sustainability and scientific evidence contributed to the healthification of the beauty industry. Pushed by shifting dietary choices, these concepts are making their way into the food and drink arena, ushering a new era of **Intelligent Indulgence** and snackified supplements.

It is not as much about ‘Free From’ as it is about ‘Supplemented With’, a shift that will pave the way for a new generation of scientifically enhanced fortified foods and functional drinks.

The question ‘what can science add to nutrition?’ is more relevant than ever as technological progress makes way for modified food that doesn’t negatively impact health but, on the contrary, can enhance its properties. Take lab-grown ingredients, which will increasingly become accepted as better-for-you, cost-efficient and environmentally friendlier alternatives.

Ultimately, when tech hacking offers the possibility to have the cake and eat it too, consumers will opt for solutions that skip the compromise. On our future menus? Products marrying fun with functionality, pleasure with performance and nourishment with novelty.

‘Functional boosts like vitamin C shots, pre-workout shots or added protein can provide people with what they need to thrive, or maybe just survive at a time of high global stress, helping people feel resilient in this polycrisis era’

Adam Steel, foresight manager, McDonald’s

Drivers

The food and drink sector is faced with mounting challenges: inflation, environmental considerations, health fads and misinformation. These are all combining to cause people to re-evaluate their day-to-day food decisions



Nutrition Recession

The climate crisis is causing a worrying ‘crop drop’ and harvests are yielding fewer micronutrients, making it harder to provide our nutritional needs



Lab Farming

Since LS:N Global’s Pharma Farms, featured in our 2020 macrotrend Total Tastes, advancements and adoption of agriculture-less foods have come a long way



Status Snacks

In parallel to our Hype Bakes microtrend, the phrase ‘you are what you eat’ is taking on new meaning in the face of hype groceries, hipster bakeries and niche memes



Ozempic Afterquakes

Weight-loss drugs are in high demand due to the worsening obesity epidemic and persistent diet culture, with global eating habits set to be affected

Nutrition Recession

In the future, eating five portions of fruit and vegetables a day, as recommended by the World Health Organization, may not cut it. The climate crisis is causing a worrying 'crop drop' and harvests are yielding fewer micronutrients, making it harder to provide our nutritional needs. In 2022, Mayer published a study comparing food in the UK in 1940, 1991 and 2019, revealing a staggering decline in nutrients, especially sodium, iron, copper and magnesium. The US publication The Atlantic reported on the looming **Fruit Chaos**.

At LS:N Global, we explored how 'forgotten crops' can alleviate the pressures of the global food system in **Uprooted Diets**. **Algae oil** is emerging as a sound substitute for cooking oil and **WinWin** is making chocolate from cereals and legumes, which are 'abundant, sustainable and good for you'. This could also provide cost-savings, given that cocoa prices are at a 46-year high, and about 65% higher than they were in 2023 (source: **CoBank**).

Innovative solutions will be vital to ensure that people are getting the nutrients they require. In January 2024, 60% of food-insecure households in the UK said that they are buying less fruit than normal, and 44% are purchasing fewer vegetables because of financial concerns (source: **The Food Foundation**).

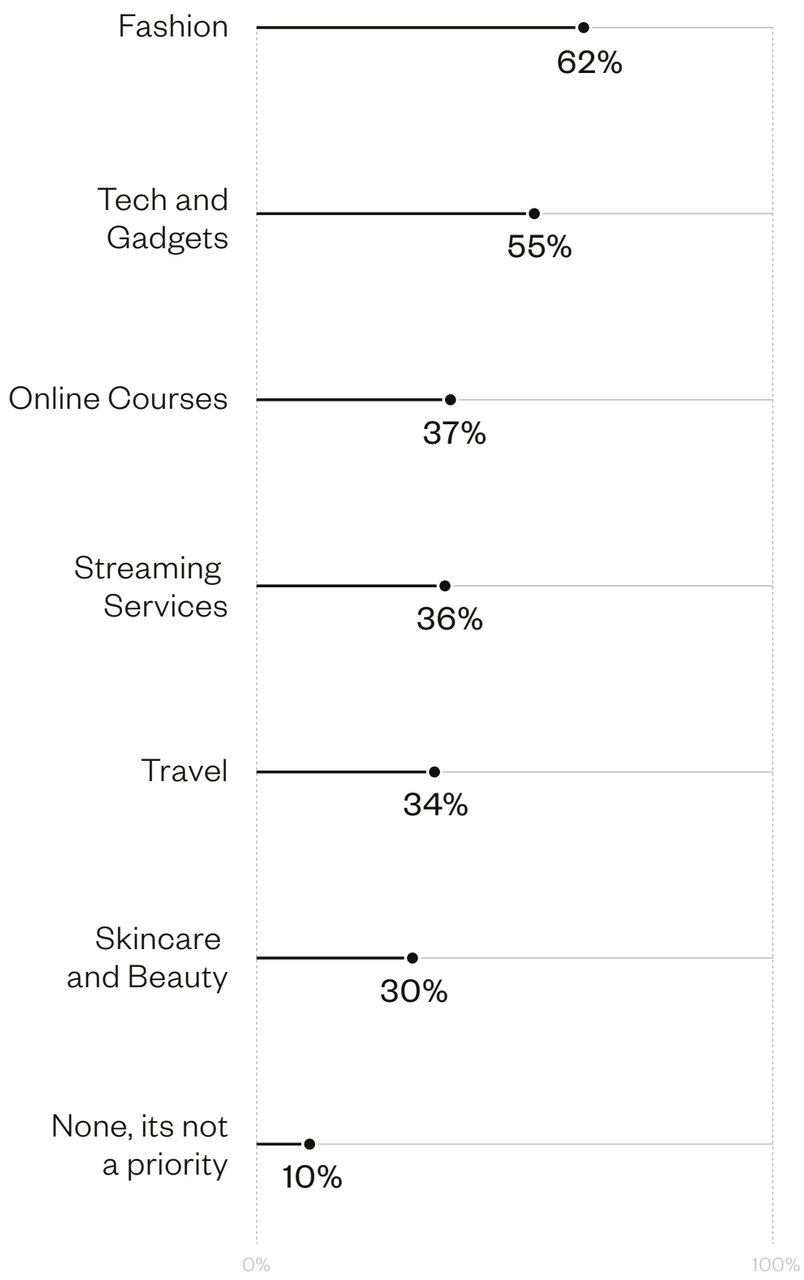
Global Driver : Resource Scarcity

The urgency of the climate crisis is putting stress on food supply chains, driving fast-paced and disruptive innovation in anticipation of the nutrient and ingredient shortages to come



Algae Cooking Club, US

Amidst the cost-of-living crisis, which of the following would you cut back on to prioritise spending on healthier food options ?



Source: **Lifesum**



Landless Food by Malug Lückin, Embassy of Food, Dutch Design Week, The Netherlands

Lab Farming

Since LS:N Global put forward the concept of Pharma Farms in our 2020 macrotrend **Total Tastes**, advancements and adoption of agriculture-less foods have come a long way. Take **Pluri's** lab-grown arabica coffee and **Voyage Foods**' nut-less peanut butter.

Lab-grown proteins and hybrid products such as blended meat have the potential to deliver better nutritional contents at a lower financial, and environmental, cost.

At **Dutch Design Week** 2023, London-based food designer **Leyu Li** showcased three conceptual products combining lab-grown meat with vegetables. Named Broccopork (broccoli and pork), Mushchicken (mushroom and chicken) and Peaf (peas and beef), Li's inventions imagine meat tissue cells grown on a vegetable's surface to create a new type of cultivated meat. Although the products are currently imaginary, Li consulted cellular agriculture company **Hoxton Farms** to ensure the products were science-backed and plausible.

Similarly, a group of scientists from South Korea's Yonsei University have developed **beef rice**, a sustainable protein made by growing cow cells inside grains of rice. Meanwhile, Chinese start-up **CellX** has ventured into mycelium and cultivated meat to create more affordable hybrid protein, and Israeli start-up **Novella** has taken cultured meat technology and applied it to whole plant cells, paving the way for lab-cultivated berries.

Global Driver : Accelerating Technologies

With tech breakthroughs moving quickly, nature-less proteins and ingredients are closer to becoming commercially viable, when they will hit restaurants as well as private kitchens

The molecular farming industry is expected to reach **£2,770m** by 2029, growing at **6%** a year between 2023 and 2029

Source: ***QYResearch***



Peaf by Leyu Li, The Netherlands

Status Snacks

The phrase ‘you are what you eat’ is taking on new meaning in the face of hype groceries, hipster bakeries and niche memes. Some 52% of consumers agree that it would be ‘amazing’ to have an instant buy button for snacks they discover on social media (source: **Mondelez)**.

Take the ever-growing popularity of Los Angeles supermarket chain **Erewhon**, which has some customers working several jobs to afford the store’s pricey treats, according to **The Cut**. Now, other health-first stores are racing to become ‘the local Erewhon’, and have been dubbed as ‘**hypebeast grocers**’ by Snaxshot. In New York, **Pop Up Grocer** and **Happier Grocery** opened in 2023 and other corner stores and bodegas have become purveyors of sustenance that doubles as social currency, as we chart in **Rise of the C-Store**.

In parallel, our **Hype Bakes** microtrend explores how new bakery concepts started taking cues from streetwear to reach hypebeast levels of popularity. Driven by the drop business model, local bakehouses such as **L’Appartement 4F** in New York and **Forno** in London have people waiting for hours for a buttery bite that they can flaunt on social media. Look out for new iterations of snacks designed to foster a sense of community through exclusive food experiences.

Global Driver : Micro Globalisation

Food lore is a social currency. Niche communities are propelling local products and places to cult status and cultivating food subcultures where the barrier to entry is not finance, but knowledge

What are Drivers?

Drivers are fundamental shifts and external forces that have the potential to reshape the future trajectory of a brand or business, also sometimes referred to as mega-trends or global forces of change. They differ from trends in that they are long-term structural forces that are pervasive, powerful and transformative

The Claw-ner Shop, White Claw’s corner shop dedicated to house parties for 2 nights in November 2023, London, UK

‘[A total lack of interest in food and alcohol] seems to be a typical feeling that Ozempic users share, and helps with the weight loss that people achieve on it’

Dr Hana Patel, NHS GP and GP medico-legal expert witness

Ro platform allows its users to get prescription weight loss medication like Wegovy online, US

Ozempic Afterquakes

More than half of the world’s population will be overweight by 2035, compared with 38% today, according to the **World Obesity Federation**. A sobering statement, which explains why nearly 7% of Americans will be using weight loss drugs by 2035 according to **Morgan Stanley’s** predictions.

People wishing to shed pounds now have more tools in their belt due to new developments in the **Weight Loss Market**, most notably medication containing semaglutide which mimics a hormone in the intestines, inducing a feeling of fullness. In October 2023, LS:N Global **reported** on the soaring value of semaglutides, poised to become a £82.3bn ($100bn, €95bn) market by 2035.

The most high-profile of these is Ozempic, originally formulated to help adults with type 2 diabetes manage their blood sugar, but now being used as a weight-loss drug in the US. A similar version is available in the UK as Wegovy, specifically for weight loss.

A **study** from Numerator found that people using GLP-1 medication (another diabetes treatment which is becoming popular for weight loss) spend less in grocery stores, mainly cutting back on bakery items and snacks. Other research shows that such weight-loss drugs impact alcohol sales, as 62% of people drink less while taking them (source: **Bloomberg**).

Global Driver : Evolving Demographics

Against the backdrop of an aggravated obesity epidemic and persistent diet culture, weight-loss drugs have become a hot commodity. Alongside many other implications, their popularity is set to impact eating habits globally

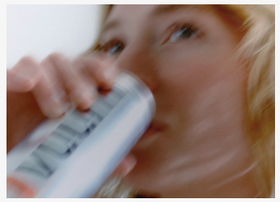
Insight

Navigating turbulent market conditions and heightened consumer expectations, food and beverage innovators are rolling out novel concepts and flavour-first functional nutrition boosts



Posh Pantries

Along with artisanal baked goods, other foods are gaining traction as status symbols, including essential produce and cupboard staples



Palatable Protein

Packing in enough protein is a key nutritional concern for many people, but how will brands deliver convenient solutions to meet today's dynamic lifestyle demands?



Better Than Water

Water is undergoing a makeover with added ingredients such as electrolytes, powders or syrups, designed to elevate its nutritional content and flavour simultaneously



Fetish Foods

Sex sells, and so does sexy food. People are leaning into the pure pleasure of eating as a backlash against diet culture and draconian wellness trends



Comfort Cuvées

How do you sell wine in an economically uncertain world, where young people are experimenting with sobriety in record numbers?



The New Novelty-Nostalgia Equation

As tensions between healthy foods and feel-good options evolve, brands are attempting to rekindle interest in essential products and heritage institutions through this new equation



Dinner Drug, Greece

Posh Pantries

Along with artisanal baked goods, other foods are gaining traction as status symbols.

Humble cupboard staples are having premium makeovers and are being updated with sophisticated flavours and attractive branding to elevate home cooking. Luxe legumes have been spearheaded by **Heyday Canning** in the US and **Bold Bean Co** in the UK, the renaissance of tinned fish is embodied by stylish and sustainably sourced seafood brand **Fishwife** in Los Angeles and **Graza** olive oil, packaged in squeezy bottles, has made its way into countless food influencers' videos in the US.

Another olive oil trailblazer is Cretan brand **Dinner Drug**. Launched in early 2024, the high-quality 'illegally good' oil marries bold brand identity with tongue-in-cheek copy. **All Things Butter**, despite being from a dairy near Glastonbury which has been operating for 70 years, is refreshing this somewhat staid category. Made with organic milk and churned for optimal creaminess, it hit shops in November 2023 with its eye-catching packaging and butter infused with chilli, garlic or herbs, alongside plain and salted versions.

Fresh fruit and vegetables are also getting the high-end treatment. US-based **Oishii** became famous on social media for its luxe strawberries and went on to introduce The Rubī in 2023, a premium variety of tomato touted as 'the sweetest ever'. These developments might seem outlandish in the context of a **cost of living crisis** but they reflect the desire for quality indulgence in grocery, as such items are more affordable indulgences than dining out. Research shows that, globally, people are almost three times more likely to treat themselves to food or drink than to personal care (source: **Deloitte**).

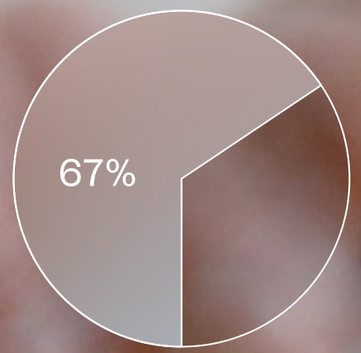
'Consumers have more retail channels in which to purchase speciality food. Foodservice is rebounding and makers are innovating with sourcing, ingredients and promotion'

Denise Purcell, vice president of resource development, Specialty Food Association

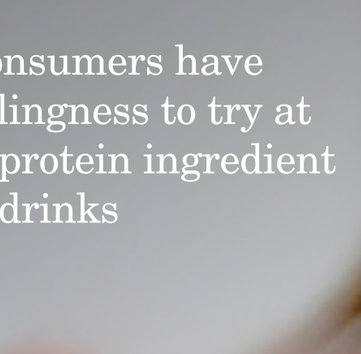


All Things Butter, UK

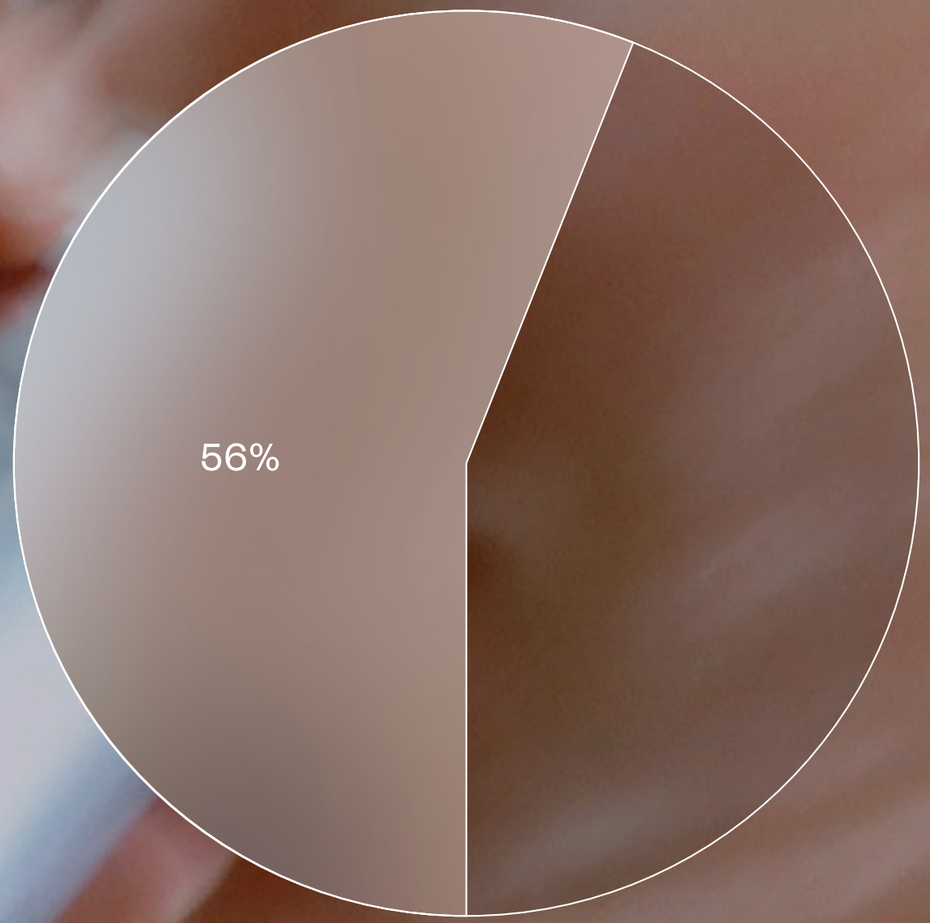
A majority of consumers have expressed a willingness to try at least one novel protein ingredient in their food or drinks



Animal-free dairy Protein



Cultured Protein



Overall

Vuum, US

Source: McKinsey

Palatable Protein

Packing in enough protein is a key nutritional concern for many people. According to **Google Trends**, searches for ‘high protein’ have been steadily growing and reached a five-year high in December 2023.

In this buzzy and saturated market, what will consumers be reaching for to achieve their on-the-go protein fix? In the UK, **Lunar Lifts** hopes to make fitness-first nutrition more approachable and fun. It has crafted ‘gym rat approved protein that tastes just like your favourite Asian drinks’, spanning flavours including milk tea, taro and coconut mango cream.

Another standout is **Bored Cow**, the New York brand behind a first-of-its-kind alt-milk. Its vegan and lactose-free drinks are made with fermented whey and the range includes plain and fruit-flavoured milk, with yoghurt introduced in spring 2024.

Elsewhere, clear or juice-like isolates emerge as a lighter alternative to milky textures. One example is Seattle’s **SEEQ**. Boasting a fresh brand identity since August 2023, this powdered whey isolate comes in fruity flavours that taste like a juice when mixed with water. Also in the US, **Vuum** is a plant-based, pre-mixed, carbonated energy drink containing vitamins, minerals and amino acids, promising to deliver ‘energy that won’t leave you feeling empty’.

Better Than Water

Even water is undergoing a makeover. On TikTok, **#WaterTok** is brimming with videos of creative concoctions, dubbed 'sexy water' by content creator **Kelly Grace Mae**. 'Fun and functional ingredients' such as electrolytes, powders or syrups elevate the nutritional value of water while making it tastier.

H20 hero hydration aids are available from brands such as Germany's **Funq**. Launched in May 2023, Funq makes syrups containing fruit, vitamins, minerals and plant extracts which are ready to be poured into tap or sparkling water.

The electrolyte drinks market is projected to be worth nearly £47bn ($59bn, €56bn) by 2032, growing at 5.9% each year, according to **Precedence Research**, and large brands are taking notice. **Gatorade** introduced an electrolyte-infused unflavoured water in February 2024, a first for the energy drinks giant. The same month, Californian water brand **Liquid Death** introduced the **Death Dust** electrolyte mix, packing in sodium, potassium and magnesium in single-serve, flavoured powder blends.

UK-based **Wow Cacao** offers a greener alternative to coconut water. Made from cacao pulp, a by-product of chocolate production, it has no added sugar or sweeteners and is naturally high in minerals and antioxidants.

As younger consumers are more likely than older people to try a new beverage each month and to drink bottled water (sources: **Morning Consult**, **Mintel**), expect to see the continuation of innovative additions to the water market.

The electrolyte drinks market is projected to be worth nearly **$59bn** by 2032, growing at **5.9%** each year

*Source: **Precedence Research***



Natural energy shots by Funq with added vitamins and minerals, Germany

‘We want people to look at our imagery and just laugh or think, ‘Oh my God, I’ve never seen that from a pickle company before”

Yasaman Bakhtiar, co-founder, Good Girl Snacks



Single & Fat, US



Good Girl Snacks, US

Fetish Foods

Sex sells, and so does sexy food. Building on our past microtrends including **Gastronomy Fetish** (blending erotic exploration and culinary culture) and **Erotic Eating** (shopping and eating experiences centred on touch and hedonism), people are leaning into the pure pleasure of eating as a backlash against diet culture and draconian wellness trends. The result? Unapologetically sensual and raw branding, inviting individuals to go feral and indulge in food that is salty, sweet, fatty and acidic without restraint.

US company **Good Girl Snacks** was founded by friends Leah Marcus and Yasaman Bakhtiar in 2024, capitalising on the internet’s obsession with pickles by creating a modern and relatable brand with creative flavours and provocative imagery. Its Hot Girl Pickles are named after TikTok’s ‘hot girl’ mentality, bringing spice and humour to the jar aisle.

New York olive oil brand **Single & Fat** is suggestive, to say the least. The certified organic extra virgin olive oil is meant for ‘cooking and finishing’, preaching hedonism and heavy drizzling for a generous, pleasurable eating experience. ‘We’re taught that feeling less, tasting less and indulging less is somehow better,’ reads the brand’s website. ‘In a world of delicate drizzling – we want you to douse us on everything.’

Shameless indulgence is also the USP of Singapore gelato brand **Sweet Cheeks** which is committed to making the ice cream experience delightful, engaging and unexpected with playful branding and elevated flavours.

The certified organic extra virgin olive oil brand Single & Fat is meant for ‘cooking and finishing’, championing hedonism and heavy drizzling for a generous, pleasurable eating experience, New York, US

‘Luxury will still have its place in wine, but there’s also space for wine to be more approachable and sustainably minded’

Sami Cherkaoui, co-founder, Viavino



Viavino, Canada

Comfort Cuvées

How do you sell wine in an economically uncertain world where young people are experimenting with sobriety in record numbers? In the past, winemakers tried to solve this problem with **low- and no-alcohol wines** or by playing with **unconventional branding** to appeal to younger drinkers. Now, a new wave of vintners is betting on deluxified wine to complement not-so-fancy food. They are making wine accessible by offering clear pairing suggestions, affordable prices and convenient portion sizes.

In November 2023, Pernod Ricard introduced **Greasy Fingers**, two wines to be paired with takeaway food. In the US, **Pizza Wine** does what it says on the tin – it tastes good with pizza. Produced locally on Rhode Island, the sparkling red is designed to complement zesty tomato sauce while the acidity cuts through fats like cheese and pepperoni. Another brand offering **Comfort Cuvées** is Canada’s **Viavino**, which is deconstructing old-world wine with its Tetra Pak packaging and simplified pairing notes.

Conversely, other hi-low food and drink marriages elevate fast food with fine spirits. At New York eatery **Coqodaq**, fried chicken is served with champagne, giving the popular fast food the fine-dining treatment.

What is Insight?

Insights explore the nascent consumer behaviours, attitudes and trend responses emerging today that will evolve or gain traction in the near future through to 2025–26. Insights help brands and businesses to understand and identify the opportunities presented by this trend



Murray's Cheese by Base Design, photography by Laura Murray, US

The New Novelty-Nostalgia Equation

As tensions between healthy foods and feel-good options evolve, traditional products and heritage institutions are somewhat overlooked. In response, brands are attempting to rekindle interest through the new Novelty-Nostalgia Equation, a 2024 iteration of LS:N Global's **Frivolous Foods design** direction that saw F&D brands embracing nostalgia and escapism in branding.

Take **Murray's**, a cheese shop in Greenwich Village that has been supplying New Yorkers since 1962. The retailer called on **Base Design** for an identity refresh as it plans to grow its online presence. The brief: make Murray's feel dynamic and approachable while underlining the rich history of the establishment, rather than going for a youth-targeted overhaul. Another example of a brand tapping into this New-stalgia is **Lapo's**, a non-alcoholic canned negroni with packaging showing a traditional-looking Italian waiter. While catering for modern flexible drinking habits, the product encapsulated the timeless and authentic essence of a beverage rooted in Italian culture since the late 1940s.

In Beijing, Pangmei enlisted **Meat Studio** to create an identity for its range of noodles, evoking the spirit of Hong Kong and Taiwanese night markets from the 1990s but with a modern spin. The same approach was taken when it debuted a range of traditional Chinese desserts in March 2024, with the aim to appeal to younger consumers who might not be familiar with these delicacies.

Brands can also look to McDonald's. The heritage feel-good brand, renowned for its 'I'm Lovin' It' slogan, **revamped** its iconic **ad campaign from 1989**, enlisting prominent artist and former employee Lil Yachty to resonate with a younger audience.

74% of consumers globally agree that 'novelty of the flavour and texture combination is important' when choosing a snack

Source: ***Mondelez***



Menu song remix by Lil Yachty for McDonald's, Canada

Foresight

In the future, consumers will seek solutions allowing them to have their cake and eat it too, prompting the sector to reconcile pleasure and practicality, fun and function, hedonism and health



À la Carte Calories

When it comes to diet, one-size-fits-all approaches are being replaced with personalised solutions, and it is expected that these will become the norm



Intelligent Indulgence

Food innovators are turning sugary food into family-friendly functional treats adjusted to changing palates and dietary preferences



Complete Snacks

The snackification of eating habits comes down to a rebrand of snacking as convenient, appetising and healthy – rather than as a bad habit



Emotional Support Sustenance

The growing importance of emotional care and mood-boosting products to younger generations is opening the way for innovation in the food, drinks and supplements sectors



The global personalised nutrition market was valued at **£8.8bn** in 2022 and is expected to reach **£36.2bn** in 2032

*Source: **Spherical Insights***

AI Imagery by The Future Laboratory, UK

À la Carte Calories

When it comes to diet, one-size-fits-all approaches are being replaced with personalised solutions, and it is expected that these will become the norm.

Nearly one in five Americans (18%) name the health benefits of their food and drink when they sit down to eat (source: **Tastewise**), and health tech wearables are giving us more insight into our bodies than was available to previous generations. Blood sugar monitors, once a vital tool for those with diabetes, are now being used by wellness fiends without the condition, but who want to keep an eye on their glucose levels, leading these monitors to be labelled as a status symbol by **Dazed**.

'In a world inundated with health trends, personalisation offers clarity among the noise, empowering individuals to make food choices aligned with their specific needs and goals,' **Lifesum's** lead nutritionist Signe Svanfeldt told LS:N Global. The demand for made-to-measure nutrition gave rise to apps such as **Zoe**, **Day Two** and **Youniq**, which are using predictive AI to create personalised nutritional advice. According to **Spherical Insights**, the global personalised nutrition market was valued at £8.8bn ($11.2bn, €10.3bn) in 2022 and is expected to reach £36.2bn ($45.9bn, €42bn) by 2032.

San Francisco-based **Mā** is on a mission to become a better, smarter alternative to supermarkets as we know them. Currently a concept, which is at the pilot stage, this integrated solution will combine AI, curated products, a smart supply chain and circular logistics. An app will provide users with hassle-free meal planning and shopping that they can tailor to their tastes and goals. 'The idea is to build an autonomous health model that just optimises your life in the background,' CEO and founder Ruben Smit told LS:N Global.

What is Foresight?

Foresights examine speculative future scenarios five to 10 years in the future. Building on the Insight section, they showcase new directions, divergence or developments



Nourished uses 3D printing to create personalised nutrient gummy stacks, UK

Intelligent Indulgence

Food innovators are turning sugary food into family-friendly functional treats adjusted to changing palates and dietary preferences. Indulgence innovator **Resugar** has developed a molecule with the sweetness profile and disaccharide structure of sucrose, giving it the same taste and industrial properties but with zero calories.

Smarter treats aren't just about reworking foods to be clean. The communications around **re-engineered indulgence** breaks away from the alignment of guilt with tasty foods and highlights that these are snacks that pack good ingredients but which are, first and foremost, palatable, fun and flavourful.

Launched in July 2023 in the US, **Blobs** are soft and chewy candy. Coming in wonky 'blobs' to signify their uniqueness, the sweets are plant-based, GMO-free and contain only 2g of sugar in every pack. Another example is **Flings**, an American brand which reworked toaster pastries to meet the nutritional demands of health-conscious consumers. Unlike the mass-market versions, Flings are high-protein, low-carb, low-sugar and keto-friendly. Similarly, **Magic Spoon** has replaced sweet cereal bars with ones that are high in protein and have no added sugar.

6 in **10** people are cutting back on sugar to avoid future medical problems

Source: ***Kerry***

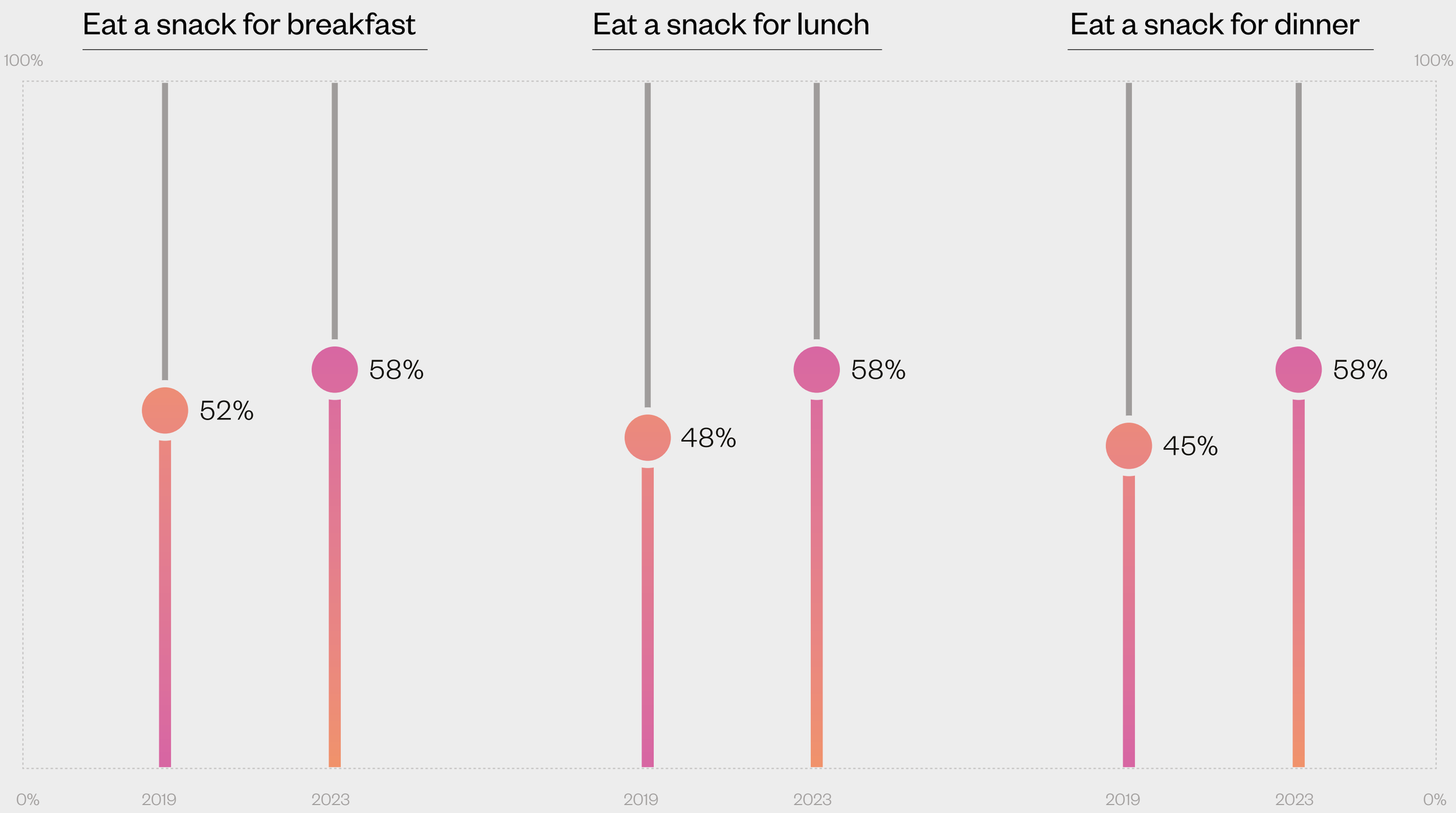


Flings brand identity by Blurr Bureau



Crafted to help amplify beauty routines, Pretty Tasty Tea is a beverage line formulated with collagen peptides to support skin, hair, joint and nail care, US

Any time is snack time



Source: **YouGov**

Consumers want snacks to boost energy (**75%**), improve mood (**74%**) and align with fitness goals (**70%**)

Source: ***Mondelez***



Complete Snacks

The future of the snacking segment is far short of being bite-sized. The 'girl dinner' TikTok trend from 2023 hints at a wider shift, considering that globally six in 10 people prefer to eat a number of small meals throughout the day, as opposed to a few large ones (source: **Mondelez**). The snackification of eating habits comes down to a rebrand of snacking as convenient, appetising and healthy – rather than as a bad habit. 'Snacking doesn't need to be a negative habit but rather a strategic opportunity to enhance nutritional intake throughout the day,' agrees Signe Svanfeldt, lead nutritionist at Lifesum.

Snackers favour on-the-go bites that do more with less and pack in essential macro and micronutrients without compromising on flavour or convenience: enter the supersnacks. According to **Mondelez**, consumers want snacks to boost energy (75%), improve mood (74%) and align with fitness goals (70%). Future snacks will even work as edible supplements with tangible benefits for mental and physical health.

Rivalz, self-described as an 'exciting snack with purposeful calories', is an example of a health-supporting supersnack, with its crunchy, protein- and fibre-filled puffs containing seven essential vitamins and minerals in each serving. Another is **Little Spoon's Lunchers**. Launched in October 2023 in the US, the grown up and nutritionally elevated take on Lunchables swaps processed snacks for whole foods. The range includes a deconstructed pizza and chicken nacho chips with 10g of protein and hidden vegetables.

The portion control, nutrient density and convenience of complete snacks also mean they are a food of choice for semaglutide users, which will further push **demand** as GLP-1 adoption continues to grow.

Today's Special, a concept project by Lyon&Lyon, showcases functional hot meals celebrating ingredients that do a little bit more than your apple a day, UK

44% of Americans use snacks once a week when preparing meals because they are too busy to cook

Source: ***Frito-Lay***



Mā AI, US



Douze is mood-enhancing non-alcoholic botanical elixir using adaptogens to boost mood and mirror the feeling of alcohol, France

Emotional Support Sustenance

The growing importance of emotional care and mood-boosting products to younger generations is opening the way for innovation in the food, drinks and supplements sectors, which are focusing on how they make people feel.

Brown's Hotel's **Donovan Bar** in London has introduced a menu of 12 cocktails, each mixed to provoke a physical or emotional response, such as adrenaline or wonder. LS:N Global explored how functional drinks are focusing on supporting emotional states alongside providing physical health benefits in **Emotional Support Sips**. Take California-based **Emotional Utility Beverage** which, in 2023, launched two ranges of sparkling drinks: Euphoric to boost mood and Focused to boost cognition. They contain natural and synthetic ingredients including GABA (gamma-aminobutyric acid), lion's mane mushrooms, alpha GPC and vitamin B.

Other solutions are also available to help people manage emotional states. Biochemist and author Jessie Inchauspé, known as The Glucose Goddess, introduced **Anti-Spike** in January 2024, a supplement intended to be taken before eating sugar or other carbs, which is supposedly able to reduce the glucose spike that ensues by up to 40%. Empowering people to be in control of how dietary choices make them feel is a challenge for food and drink producers as they race on to crack recipes for emotional regulation.

Strategic Implications

Nutrition is being positioned as the key contributor to the culture shift from lifespan to healthspan. This means that the definition of comfort food is broadening as consumers demand both pleasure and performance. It begs the question: What can science add to nutrition? The answer lies in a new role and relevance for modified foods, as technological progress offers up the possibility of enhancing its properties



Viavino, Canada

Strategic Actions

Facilitate Food Choices for Confused Consumers

The popularity of functional ingredients creates a confusing food and drink landscape. Prioritise clear labelling, educational content and honest, accredited health claims to empower consumers with knowledge



Vuum, US

Don’t Make it a Hedonism-versus-Health Choice

Tap into the indulgent mindset to capture those consumers willing to splurge on little treats with built-in benefits that justify non-essential expenses



Good Girl Snacks, US

Nourish Beyond the Plate

The soft power of food attracts, unites and drives revenue in the era of hypebeast grocers. Food and drink innovators meet their fans on many levels, from lifestyle collaborations to immersive retail concepts and hybrid products like edible supplements



The Bentel’s Box Bag by Nik Bentel Studio, US

Thought-starters

Consumer

Consumer demand is switching from free-from to fortified. Think of what you can add instead of what you can remove when developing new products, striving for the right balance between satisfaction, nutrition and excitement that consumers seek



Flings brand identity by Blurr Bureau, US

Business

As consumers pursue hyper-personalised diets, use AI and the data that health wearables provide to offer tailored food and beverage recommendations, addressing individual preferences and health needs



Veri, Finland

Culture

While the weight management market is thriving, toxic and outdated diet culture doesn't have to be a part of the narrative. Steer clear of attributing moral value to ingredients, and focus on intangible and emotional benefits rather than physical side effects



Murray's Cheese by Base Design, photography by Laura Murray, US

Related Macrotrends

2020

Total Tastes

The food-as-medicine movement is being rebranded to fit modern lifestyles, balancing flavour and function to shape our physical and psychological states

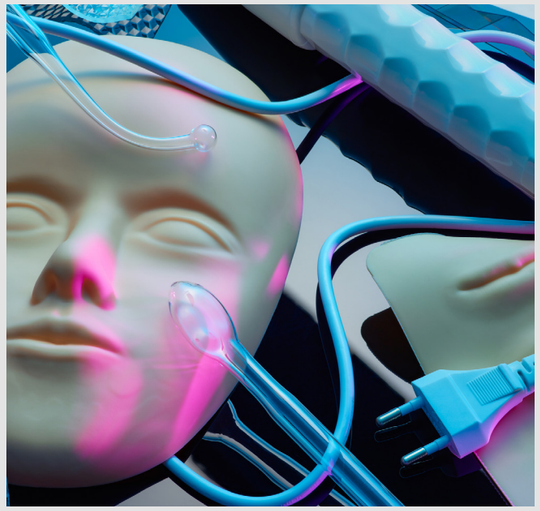


Make Them Crazy by Future Farm and Soko, Brazil

2022

Accredited Beauty

As consumers seek proof points on product quality, efficacy and sustainability, scientific evidence will drive the healthification of the beauty industry



111umination Beauty by Aurore Piedigrossi and Tobias Siebrecht, France

2022

Adaptive Appetites

Inflation and supply chain fragility have sent food and drink prices soaring. Individuals and companies are adapting rapidly – embracing frugality, innovation and indulgence to navigate this uncertain landscape



Landless Food by Malu Lücking, Embassy of Food, Dutch Design Week, The Netherlands

2023

Longevity Lifestyles

Longevity proposes that ageing should no longer be considered as a steady decline. Businesses can use it to create products that redefine how people take care of themselves



AI Imagery by The Future Laboratory, UK

Strategic Worksheet

This strategic worksheet is to help you apply this macrotrend to your business



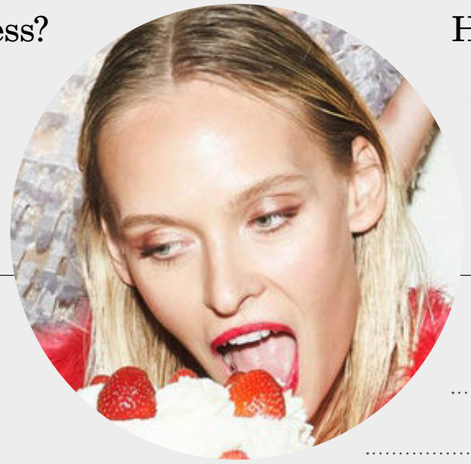
Sweet Cheeks visual identity by Bravo, Singapore

Prioritisation

Influence

Which human need is most relevant to your brand/business?

Attainment | Belonging | Curiosity | Identity | Purpose | Security | Fulfilment



How will this trend affect how you fulfil that need?

Which driver will have the most impact on your brand/business?

Urban Mindset | Dislocated World | Accelerating Technologies | Evolving Demographics | Climate Change & Resource Scarcity | Global vs Local

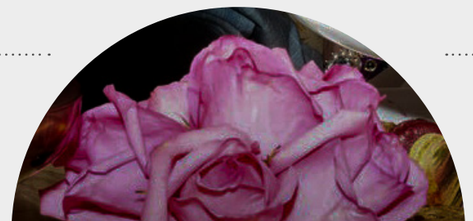
What impact could these drivers have on the business?

Select two insights that feel most relevant to your brand/business:

How do these insights align with your brands trajectory?

How could you apply these insights to your business?

Which foresight scenario is your company least prepared for?



What is most surprising about this foresight scenario?

Consider how this macrotrend could impact the following pillars of your brand:



01 Consumer

What's our greatest opportunity?

What are our biggest challenges?

How is the competition evolving?

What part of the value chain will add the most and least value?

How can we differentiate?

What are the strengths of the brand in this future?



02 Business

From left to right: Murray's Cheese by Base Design, photography by Laura Murray, US; Single & Fat, US

Consider how this macrotrend could impact the following pillars of your brand:



03 Consumer

What's our greatest opportunity?

How is the competition evolving?

How can we differentiate?



04 Business

What are our biggest challenges?

What part of the value chain will add the most and least value?

What are the strengths of the brand in this future?

From left to right: Good Morning Cafe by Shy FX and Bayy Agency, London, UK; Viviano, Canada

Planning

YEAR 1

Over the next 12 months, how will this macrotrend affect your team?

YEAR 2

In three years, how will this macrotrend change the brand?

YEAR 3

In five years, how will this macrotrend change the business?

Methodology

Strategic foresight is the most valuable tool you can adopt to identify future prosperity. Despite our reputation for getting it right, we can't predict the future. There is no crystal ball.

However, our methodology enables clients to interpret and frame all their decisions about future risk within a brand, consumer or organisational context that is provable, practical and minimises uncertainty.

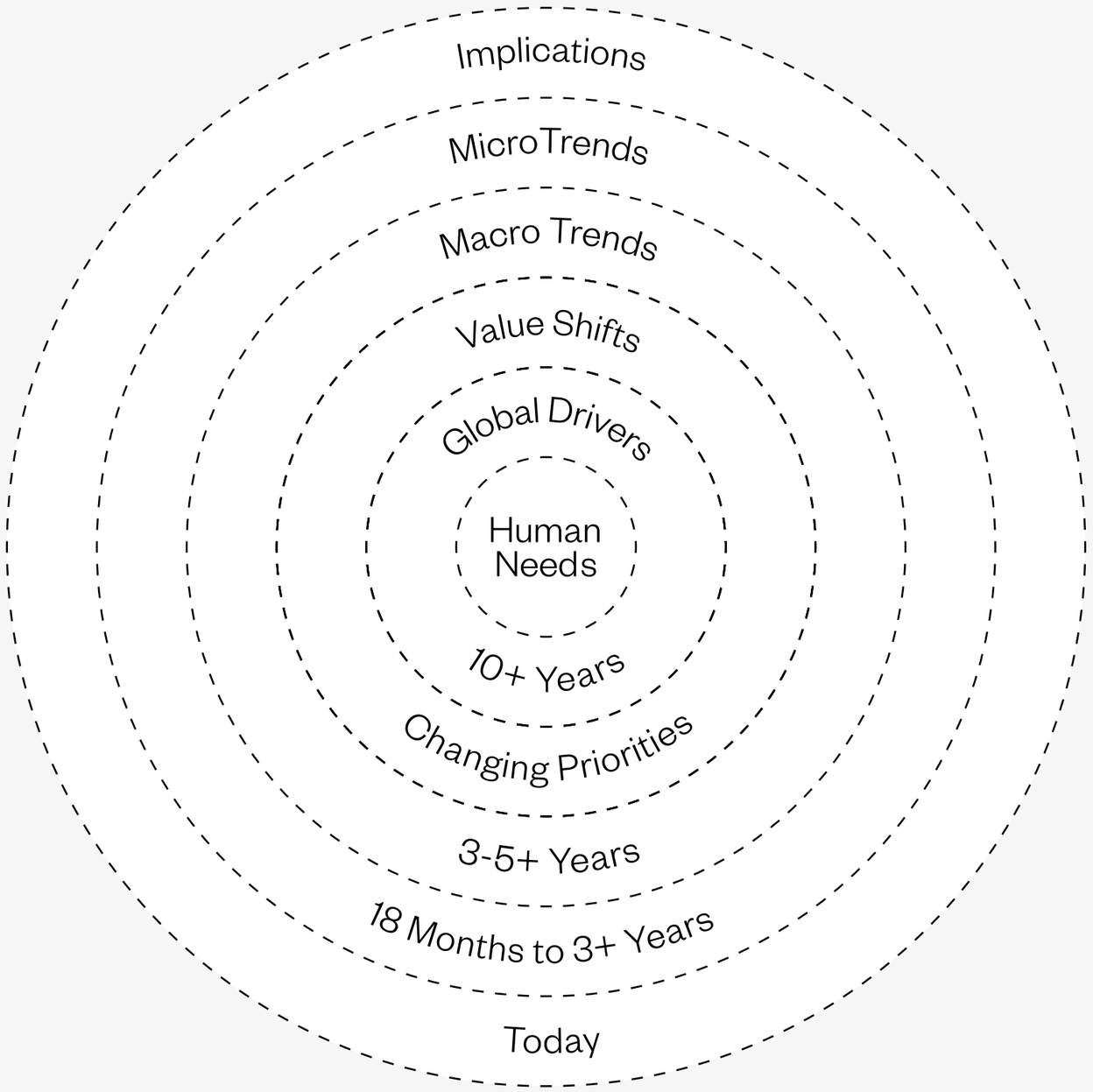
We do this by understanding the influence of six global drivers causing profound, consistent – and therefore relatively predictable – change.

Their impact is assessed against seven core human needs and the ensuing value shifts that change consumers' attitudes and behaviours.

This leads us to identify emerging macrotrends and microtrends, and ascertain what their implications are for the future landscape



Lab Meta for The Future Laboratory



The Future Laboratory's proprietary foresight methodology

Methodology: Foresight Process

At the heart of The Future Laboratory is a unique proprietary methodology that allows us to determine, define and track the key drivers of change affecting the future. We do this by tracking:

Human Needs : Universal

The foundation of our society based on a value system that supports human nature's physical and emotional programming.

Global Drivers : 10-year+ Horizon

Key global drivers represent the cultural, social, economic, political, technological and environmental eventualities reshaping the world we live in.

Value Shifts : Ever-evolving

The new ways in which we strive to meet these human needs, shaped by our contemporary context.

Macrotrends : 3–5 years+ Cultural and Societal Shifts

The cultural manifestations of new and emerging attitudes worldwide as shown by the behaviours of innovators and early adopters.

Microtrends : 1–3 years+ Lifestyle

Specific and tangible business innovations already emerging across key lifestyle categories

This report is based on the food & drink sector research from The Future Laboratory's trends intelligence platform, **LS:N Global**

Read our latest articles and sector reports:



Neozempic Futures

The overnight success of Ozempic and similar medication has revolutionised the weight loss market, but the weekly injection is on its way to reshaping way more than waistlines.



Five Champagne and Wine Brands Exploring Provenance Retail

Moving away from the traditional store experience, champagne and wine brands are using authentic storytelling to disrupt how and where consumers view and buy their products.



Creating a Metaverse Wine Community

Crurated is re-inventing the way collectors buy, store and enjoy wine – offering lessons in neo-collectorship for other sectors. Founder and CEO Alfonso de Gaetano speaks to LS:N Global.

We can also deliver our macrotrends to your business in a number of ways, from on-demand video presentations to strategic workshops and bespoke reports.

If you want to find out more, say

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The Future Laboratory is one of the world's foremost strategic foresight consultancies. Members of our trends intelligence service LS:N Global get exclusive access to the mindsets defining tomorrow and the early adopters driving global change across ten industry sectors.

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