Mondelēz International

STATE OF SNACKING: FUTURE TRENDS

25 POWERFUL TRENDS SHAPING THE FUTURE OF FOOD AND SNACKING WITHIN THE NEXT DECADE

in partnership with

The Food Institute

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FOREWORD

Nick Graham
Senior Vice President, Global Head of Insights and Analytics

The world is changing, and the pace of change, already at a breathtaking speed, accelerates further. No industry is immune. Food and snacking may appear slower moving at the backdrop of frenetic speed in other sectors of the economy. Yet there is little doubt we are at the brink of a change in the way people eat, matched by developments in agriculture, food processing and manufacturing.

We already observe shifts in the industry, big and small, shaped by a variety of social, technologic, environmental, economic, and political factors. State of Snacking: Future Trends report examines these changes in greater detail. **Shifting Demographic Landscape** changes the portrait of global consumers and reshapes the global food and snacks market structure. **Increasingly Fluid Lifestyles** fuel the growing popularity of snacking, adjusting the requirements towards snacks and changing how people buy them. **People and Planet Impact Imperative** raises the awareness towards environmental and ethical aspects of consumer goods and promotes values-based consumption. Under **Health and Well-being Ubiquity,** better informed consumers increasingly recognize the impact food has on their physical and emotional well-being and take proactive steps to manage their diets, aided by smart technologies. And today, more than ever, people want to get positive experiences from life. **Resurgence of Experience Economy** manifests itself through growing popularity of novel tastes and flavors, artisanal products, a desire to revisit a warmly remembered past, and increasing expectations towards elevated shopping experiences.

Food and snacking companies that act on these and other trends today will have a clear advantage tomorrow. With the vision to lead the future of snacking, we at Mondelēz International are determined to be at the vanguard. One of the key elements of the future-focused culture we build in our company is a continuous scouting for the signals of change. As the outcome, we have created a proprietary collection of trends that we believe will impact the future of the food and snacking industry. It complements our understanding of our consumers and industry today and provides a holistic perspective on the state of snacking in the future. Our trend framework is informed by the variety of information that constantly flows from sources such as consumer surveys, our research and consulting partners' publications, social listening and search data, ingredient manufacturer and flavor house reports. We regularly update our trend intelligence so that we have the latest thinking on what's to come and can plan accordingly.

We have been sharing our perspective on where snacking is heading since the first publication of the State of Snacking report. As we continue to focus on the future, this year for the first time we are publishing a standalone extension, which explores the future of snacking viewed through the lens of consumer-focused trends. State of Snacking: Future Trends is the result of a collaborative effort between Mondelēz International and our partners from the Food Institute, Euromonitor, Kantar, Mintel and NextAtlas, who have generously contributed their insights and thinking. While no one can know exactly what the future holds, we invite you to join us in exploring where the state of snacking appears to be going over the next decade.

CONTRIBUTORS

The Food Institute has been serving the food industry with relevant, timely and uninterrupted information for almost 100 years. It serves as a trusted source of food industry intelligence, providing balanced coverage of news, data, and trends through its multimedia platform. The Food Institute's content includes newsletters, articles, podcasts, digital videos, live event coverage, and industry reports that provide in-depth information and analysis on industry-relevant topics.

https://foodinstitute.com/

Euromonitor International is the world's leading provider of global business intelligence, market analysis and consumer insights. From local to global and tactical to strategic, our research solutions support decisions on how, where and when to grow your business. With offices around the world, analysts in over 100 countries, the latest data science techniques and market research on every key trend and driver, we help you make sense of global markets.

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Kantar's Global MONITOR provides syndicated consumer insights, foresights and strategy for the global marketplace. We combine rich attitudinal survey data across 28 markets worldwide with provocative, inspiring and future-focused thought leadership on important shifts in the consumer marketplace. With MONITOR, you'll gain the deepest understanding of people's passions and priorities, prescient insight into the most vital macro and emerging trends, and a dedicated team of experts to help you get smarter and save time.

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Nextatlas is an AI platform that uses the knowledge of innovators and early adopters. Unique AI-powered algorithms continuously track and analyze data from their social media feeds and complements it with news and other sources to provide insights into emerging trends and changes in consumer behavior. This enables brands to make informed decisions about future innovation, product development and marketing strategies.

https://www.nextatlas.com/

SNACKING TREND RADAR

MDLZ Snacking Trend Radar visualizes prioritized trends and provides convenient navigation for the report.

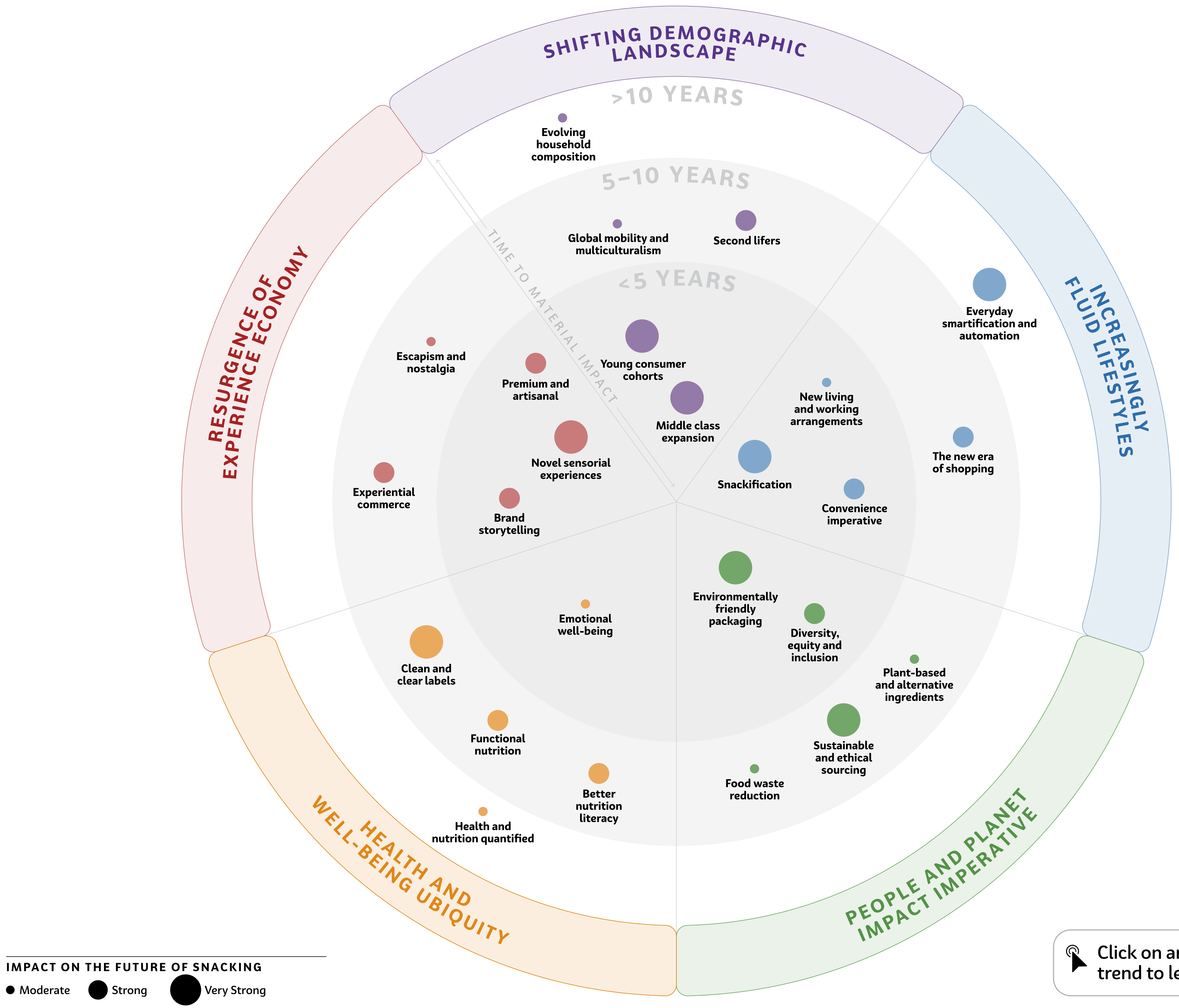
METHODOLOGY[i]

Snacking Trend Radar contains a selection of consumer-related trends that are a subset of a more comprehensive Mondelēz Trend Framework created and used within the company. The Mondelēz Foresight team, along with its strategic partners, believe these trends could have a noticeable impact on the food and snacking industry and help shape its future. Together, the Foresight team and its partners completed a trends prioritization and evaluation exercise with the outcomes displayed on this Radar.

HOW THE RADAR WORKS

The Mondelēz Snacking Trend Radar contains five macro trends that visually divide the radar into five segments. Each macro trend segment contains five individual trends represented by a circular icon. The size of the circle indicates the impact each trend could have on the future of food and snacking based on our insights: from medium to very strong. The position of each circle along its axis shows the projected time to material impact on food and snacking, and divides the radar into three circular areas:

- Near-term impact area contains trends that already have material impact or are projected to reach it within the next five years;
- Mid-term impact area with trends that we believe will reach material impact in five to ten years;
- Longer-term impact area with trends that we believe will have material impact beyond this decade.



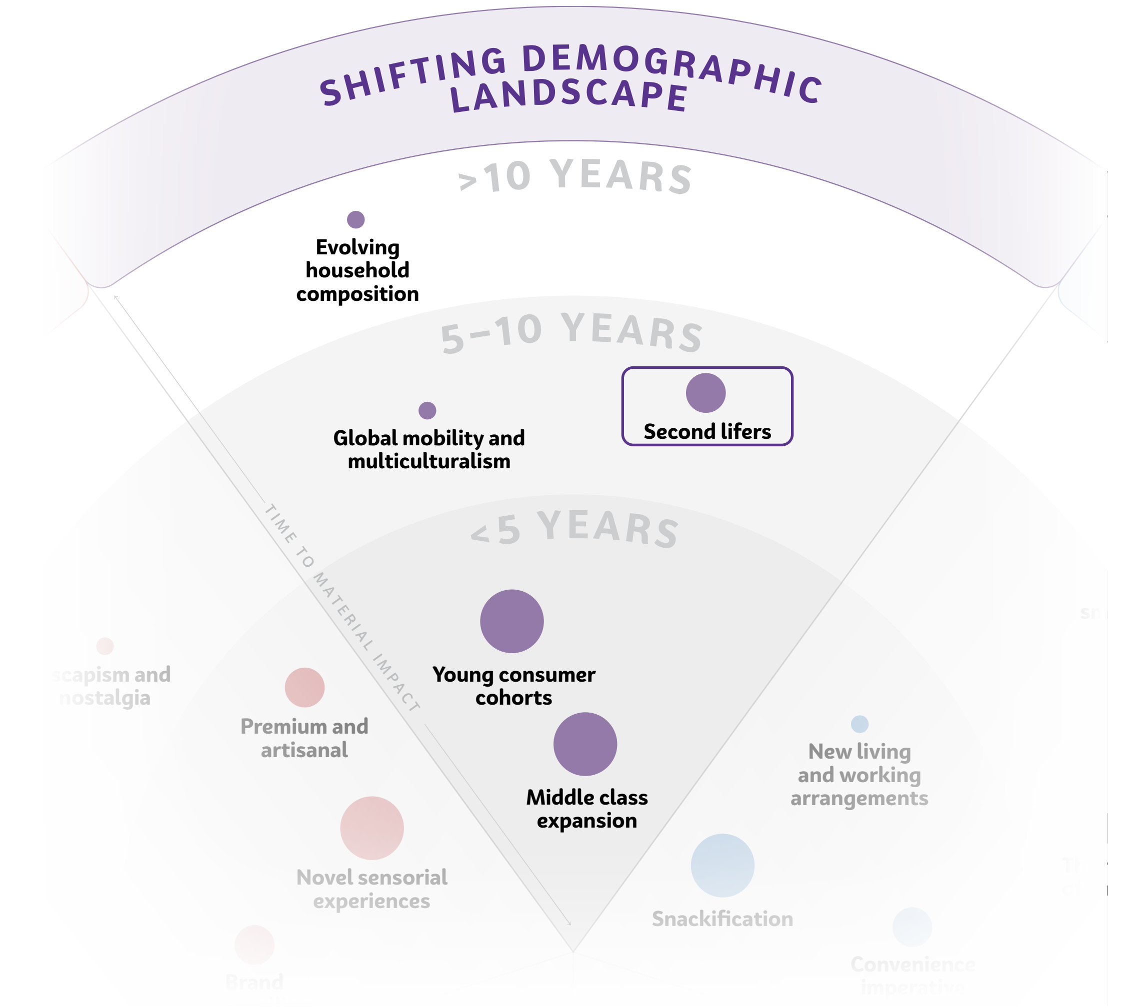
Click on an individual trend to learn more.

SHIFTING DEMOGRAPHIC LANDSCAPE

The world is experiencing an unprecedented demographic shift with more elderly, young,[1] single,[2] and new middle-class consumers[3] than ever before.

As the world's population grows,[4] people tend to live longer,[5] fertility rates decline,[6] migration intensifies[7] and household compositions evolve.[8] Thus, the global community is facing profound changes that will impact many aspects of life including how people eat and snack.

SECOND LIFERS



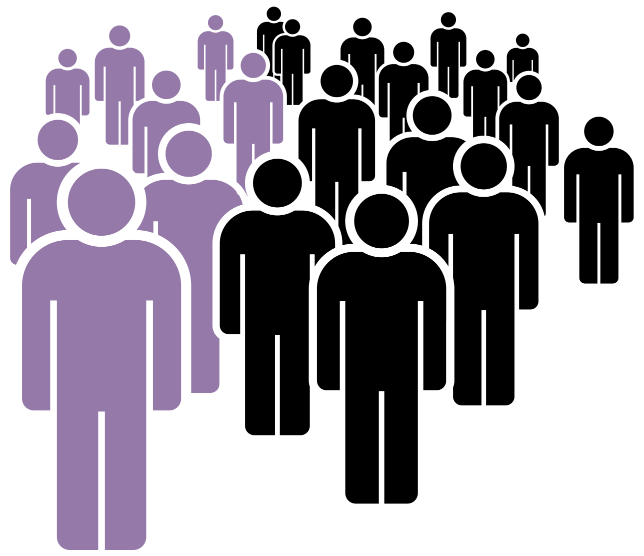
IMPACT
Moderate · **Strong** · Very Strong

TIME TO MATERIAL IMPACT
<5 Years · **5–10 Years** · >10 Years

TREND REACH

38%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023



NEXTATLAS

As the global population ages, mature consumers are gaining prominence in the global consumer market. Brands will increasingly focus on responding to their needs, preferences, and tastes.

The global population is aging. By 2050, the number of people above 60 will double to 2.1 billion, representing 22% of the world's population.[9] Today, mature consumers are healthier and living longer on average than previous generations.[10] Now, more than ever, retirement age marks the beginning of a new active life stage often referred to as "Second Life".

Second Lifers today represent the world's most affluent age cohort. Their contribution to global consumption is massive – mature consumers are projected to spend close to $15 trillion USD by 2030. They are also more physically active, socially engaged and increasingly digitally savvy: 51% of 60+ consumers make online purchases at least once a month,[12] and 42% played online video games at least once.[13]

> *"Mature consumers wield considerable economic influence, boasting the highest average gross income among all age groups in 2023.[17] They have also accumulated significant wealth and compose 14% of the highest-earning social class with the share projected to grow further.[18] Not surprisingly, mature consumers prioritize health with 65% indicating 'mental health' and 55% 'healthy weight' as the primary definition of being healthy.[19] Consequently, 50% of mature consumers report that they look for healthy ingredients in food and beverage products.[20]"*
>
> – EUROMONITOR

68% *of consumers over age 58 are snacking to pamper, spoil or reward themselves[16]*

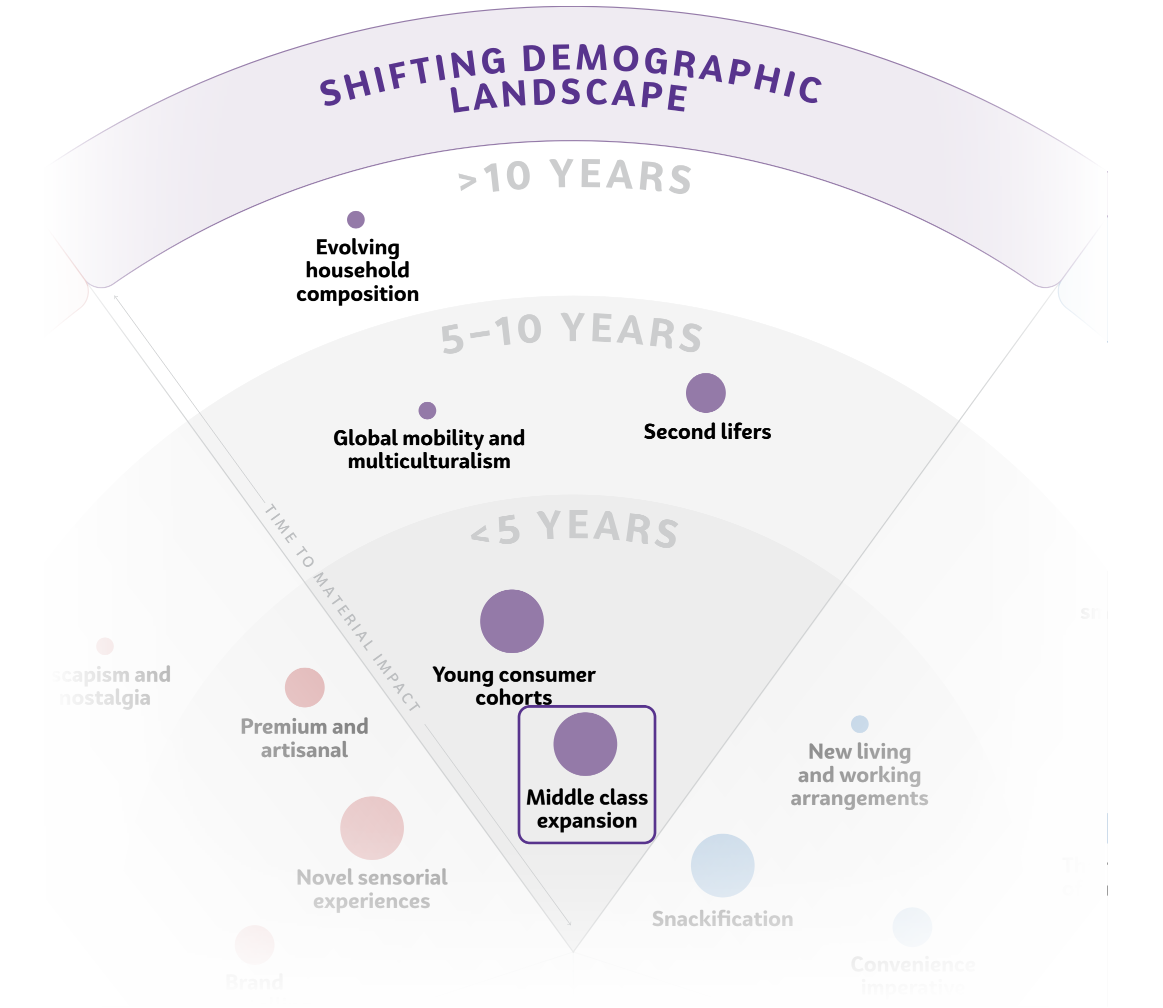
This age group wants food that supports healthy aging and an active lifestyle, putting the spotlight on balanced nutrition options. Moreover, two thirds of mature consumers consider getting their recommended daily allowance of vitamins and minerals important, contributing to the popularity of functional nutrition.[14] Even though they are a sizable group with strong purchasing power, the representation of Second Lifers in advertising is still relatively low, with only 4% of people over 60 cast in ads globally.[15]

Indulgence remains an important consideration for snacking choices, with 68% of consumers over age 58 snacking to pamper, spoil or reward themselves.[16]

GLIMPSE INTO THE FUTURE

As ranks of Second Lifers grow globally, there will be more food and snacking products catering to their needs and preferences, such as balanced nutrition critical for an active lifestyle and functional ingredients supporting healthy aging. The face of advertising will gradually age, especially in countries with a significant mature population.

MIDDLE CLASS EXPANSION



IMPACT

Moderate · Strong · Very Strong

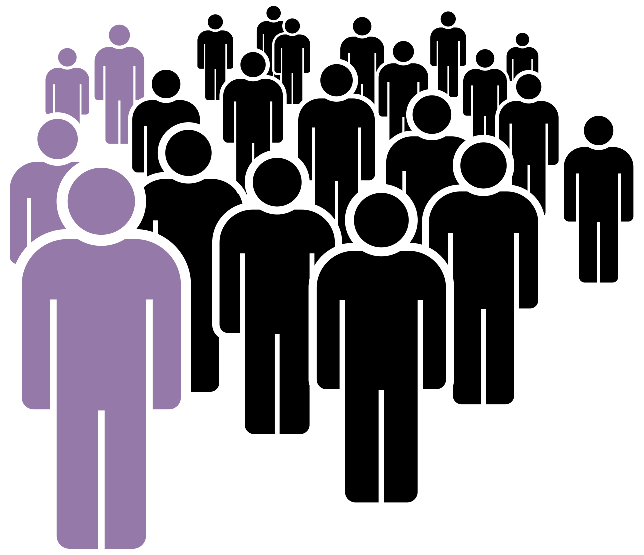
TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

20%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023



NEXTATLAS

Rapid economic growth in Asia and Africa contributes to the expansion of the global middle class and significantly boosts consumption. Appealing to the tastes of these consumers is critical for success in the global market.

A number of Asian and African countries are experiencing rapid economic growth that leads to increasing incomes for their working population, lifting a massive number of people into a global middle class. It is estimated that by 2030 the middle class in Asia will reach almost 3.5 billion people and it will almost double in sub-Saharan Africa vs 2015.[21] Middle-class consumers enjoy better spending power and financial freedom, changing their food consumption patterns and habits towards more premium and diverse products, with a greater focus on quality, nutritional value, and sustainability. 79% of Asia Pacific consumers prioritize making health-conscious decisions and 67% say they will pay more for snacks that are better for the environment;[22] both statistics above the global average.

Younger generations entering the workforce tend to migrate from the countryside to cities as urban life is perceived to offer more opportunities: more than 80% of global GDP is generated in urban centers.[23] Asian powerhouses like Shanghai, Manila, Jakarta, and Delhi, already large metropolises, will see a further significant rise in the number of dwellers in the coming years, increasing consumer goods and services markets.[24] Cities' rhythms make people adjust to a busier, more hectic pace of life, which drives the demand for products that offer added convenience and help save time. Increasing income influences food preferences towards expanded variety, higher quality, and more convenient options, including dining in, buying ready meals, and increasing snacking repertoires.

> *Whilst the growth of middle class in the developed world is marginal, emerging and developing markets such as Pakistan, the Philippines, and Nigeria are witnessing some of the strongest rates of middle class expansion globally. In absolute terms, the highest number of middle class entrants will be in China and India due to large populations and fast economic growth.*[26]
>
> – EUROMONITOR

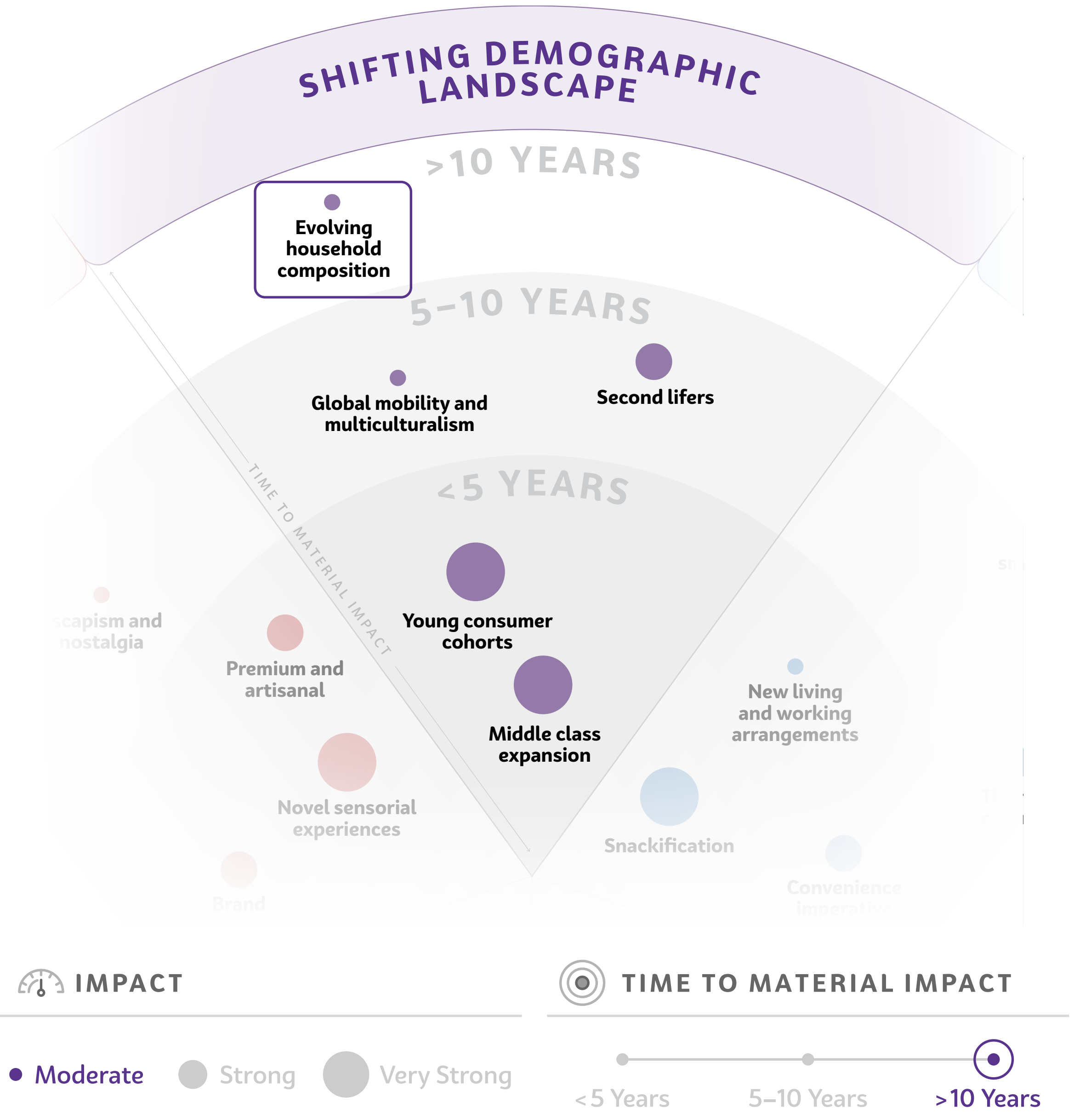
3.5BN *By 2030 the middle class in Asia will reach almost 3.5 billion people*[21]

While new middle-class consumers aspire to spend more on well-known international brands and products, they often stick to their local traditions and preferences especially for food ingredients and flavors: 40% of young consumers in India and Nigeria state they prefer traditional and familiar food.[25]

GLIMPSE INTO THE FUTURE

The rapidly growing young, urban middle class in developing economies will change the structure of the global food and snacking market, reflecting the growing role and preferences of Asian and African consumers. It will further drive the focus on sustainability, balanced nutrition, local cuisines, and flavors to cater to the diverse needs of this rapidly expanding consumer cohort.

EVOLVING HOUSEHOLD COMPOSITION



TREND REACH

51%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Global household compositions are changing, influenced by a number of demographic, economic, and social factors. This change leads to greater variety of family structures and living arrangements, impacting how people eat including their snacking habits and routines.

Worldwide the average household size is decreasing. Declining birth rates, increased life expectancy, and a rising number of single-person households all contribute to this trend. In 2020 in the U.S., a staggering 27.6% of all households had only one person, versus only 7.7% of such households in 1940.[27]

Smaller households and families lead to an overall decline in the number of relatives for the average person worldwide. A study conducted by the Max Planck Institute for Demographic Research concluded that while a 65-year-old woman in 1950 could expect to have 41 living relatives, a 65-year-old woman in 2095 is projected to have just 25, which is a 38% global decline. While the decline will happen worldwide, the largest dip of 67% is forecasted in South America and the Caribbean. In addition, family networks are expected to age considerably due to lower and later fertility rates and longer lifespans.[28]

The increasing cost of living, including housing costs, also affects household composition. In the U.S., one-third of young people aged 18-34 years still live in their parents' home, while in Europe this number is close to 50%.[29] The rising cost of real estate is increasing the popularity of alternative living arrangements such as cohabitation, multigenerational living, and communal households.

> “”
>
> *Younger generations, who have grown up within an expanding world of choice and blurring boundaries, have new perspectives on what adulthood should and could be. 47% of Gen Z say that challenging traditional stereotypes for their gender, ethnicity, age, or social class is important in their personal life.[31] As a result, young people are deferring more traditional milestones like marriage, parenthood, or home purchase until a later date, if at all, to forge novel life paths.*
>
> – KANTAR MONITOR

27.6%

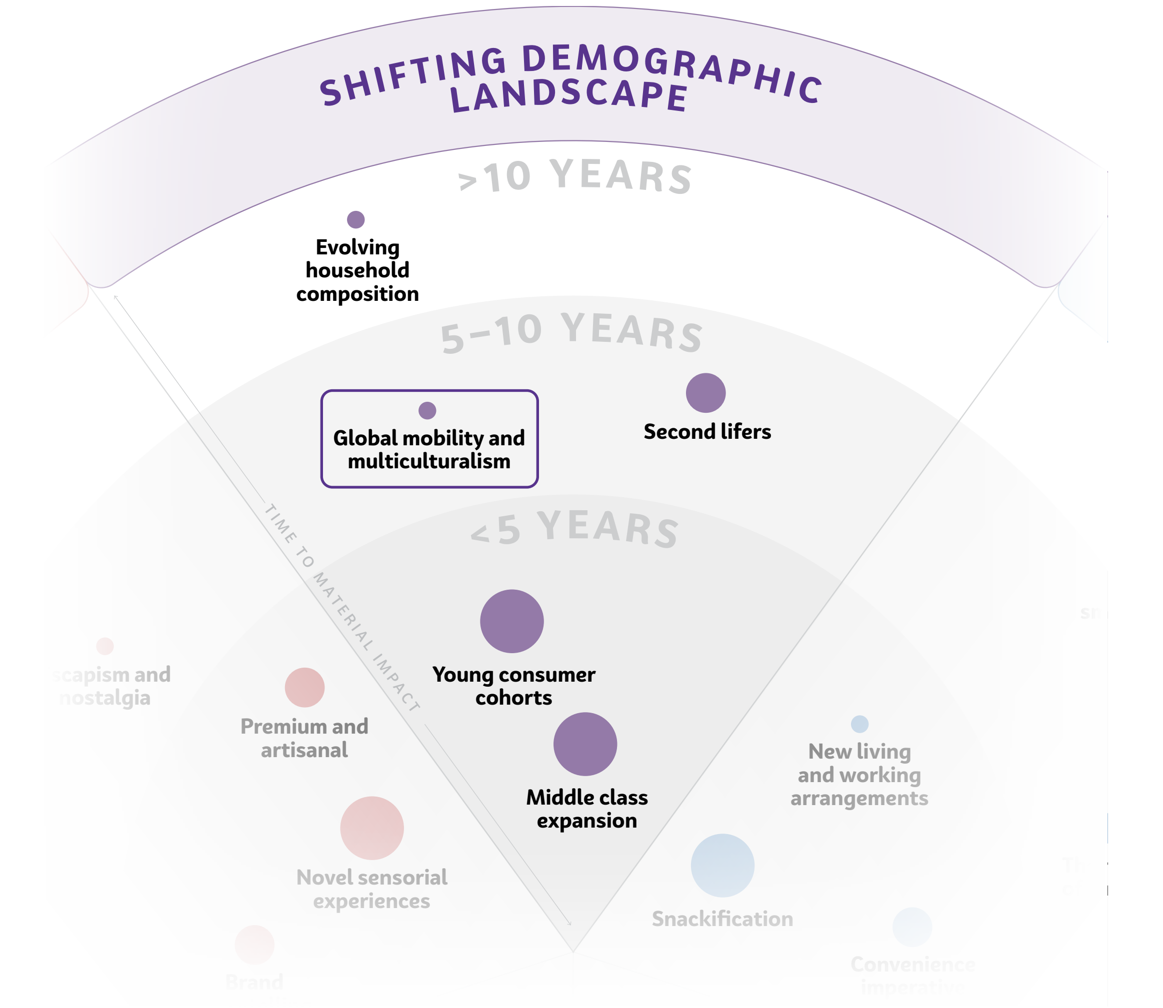
In 2020 in the U.S., a staggering 27.6% of all households had only one person[27]

Another factor impacting household composition is evolving societal attitudes towards marriage, family, and cohabitation. There is a growing acceptance of alternatives to conventional marriage, which itself is declining: almost 90% of the world's population now live in countries with decreasing marriage rates.[30] Instead, there is a notable increase in cohabitation without marriage and single-parent households, and a rise in diverse family structures like same-sex partnerships and couples without children.

GLIMPSE INTO THE FUTURE

Changing household composition impacts lifestyle choices, living arrangements, and therefore, food consumption patterns and habits. Smaller and single-person households will continue to drive the demand for single-serve packs and easy-to-prepare food options. Multigenerational and communal households will favor larger packs and options that meet a variety of dietary needs and preferences.

GLOBAL MOBILITY AND MULTICULTURALISM



IMPACT

• Moderate • Strong • Very Strong

TIME TO MATERIAL IMPACT

<5 Years | **5–10 Years** | >10 Years

TREND REACH

70%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

The intensifying international migration, tourism and digitally connected world enhances the interest in diverse food cultures and cuisines. This expands the variety of ingredients, flavors and recipes in foods and snacks and on menus worldwide.

Global migration and mobility are on the rise due to globalization, more favorable migration policies, the increasing popularity of remote work, and more affordable international transportation. There were about 281 million cross-border migrants in 2021, a 27% increase compared to 2010[32] and close to 1.3 billion people traveled internationally in 2023, +34% versus the previous year.[33]

In addition to increasing migration and international travel, information technologies and digital media also contributed to cultural globalization by effectively eliminating geographical distances and borders for information exchange. This created an interconnected world that allows people to experience and interact with other cultures instantly without the hassle of physical travel. Young generations are especially curious: 56% of global Gen Z consumers said experiencing other customs and cultures is an important personal value of theirs.[34]

These factors give rise to multiethnic societies and help strengthen multiculturalism, making people more open to new ideas and ways of life. As migrants bring their food habits and preferences with them, this influences local food markets with demands for specific ingredients and flavors. Consumers also become more aware of and interested in food from other cultures: 40% of all global consumers and 50% of young ones consider culture essential or important when purchasing new food or beverage products.[35]

> *In 2023, net migration has rebounded to pre-pandemic levels, with North America and Western Europe attracting over three million new citizens.[36] Latin America and South and Southeast Asia experienced net outflow, accompanied by the growth in remittances, fueling economic development.[37] Increased people movement prompts diversified preferences, driven by expatriates seeking familiar tastes and more informed and curious local consumers; 67% of people globally consider experiencing other cultures important.[38]*
>
> **– EUROMONITOR**

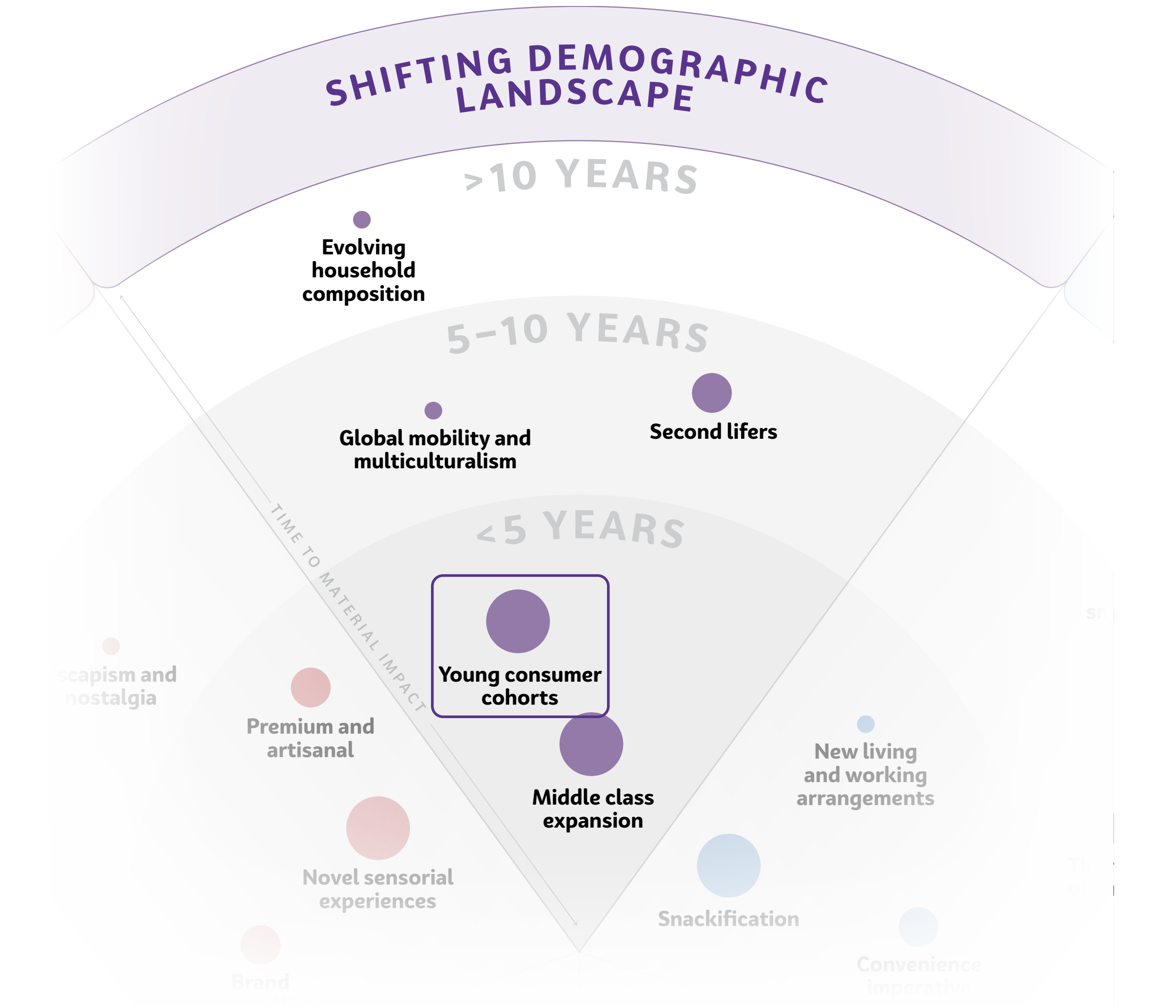
1.3BN *Close to 1.3 billion people traveled internationally in 2023, up 34% versus the previous year[33]*

Through both physical travel and online sources, such as social media, online food blogs, and video platforms, people explore international cuisines, learn about novel ingredients and flavors, and access and share recipes from around the globe. The blending of cultures has helped give rise to innovative fusion cuisines in which traditional dishes from diverse cultures are combined to create new, exciting flavors.

GLIMPSE INTO THE FUTURE

With global migration intensifying and digitally native generations becoming mainstream consumers, the international food scene is set to grow richer and more diverse. International sections in supermarkets and culturally specific grocery stores will expand the selection of food ingredients and products brought from all over the world, snacks will feature a wider variety of global tastes and flavors, and restaurants will increasingly incorporate international cuisines and dishes in their menus.

YOUNG CONSUMER COHORTS



IMPACT

Moderate · Strong · Very Strong

TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

48%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Gen Z and Gen Alpha are emerging as the world's dominant consumer groups. Their distinctive needs and preferences will significantly shape the global food and snacking landscape.

Younger consumer cohorts – namely Gen Z and Gen Alpha – currently make up 41% of the global population[39] and are becoming more impactful consumers. They differ from previous generations in several ways, affected by social, economic, and technological factors.

Gen Z and Gen Alpha are the first generations that were born within the digital era. Being digital natives, they are active users of social media and have a strong preference towards e-commerce: they rely on online resources and platforms for product information, reviews, and purchases.[40] Globally, 47% of Gen Z get more information about snacks through social media compared to 31% of all consumers surveyed globally,[41] and 69% make online purchases at least once per month.[42]

Early access to global information made this consumer cohort multicultural, open-minded, and more receptive to new ideas and experiences. This influenced their preferences in food and snacking, steering them towards more diverse international cuisines and inspiring curiosity to explore novel ingredients and flavors.

Younger consumers are also more aware of, and concerned with, environmental and societal issues. They prioritize sustainability and ethical considerations while making purchases, favoring brands that align with their values: 66% consider buying sustainable products or choosing environmentally and socially conscious services as the way to express their identity and beliefs.[43]

> *We observe rising popularity of pragmatic and values-based consumption among younger generations: second-hand shopping is gaining momentum with 'thrift hauls' growing +94% YoY[45] in 2023 replacing fast fashion. Additionally, Gen Zs leading 'veganization' of indulgent foods with +91% YoY increase of 'vegan delights' mentions among this audience.[46]*
>
> – NEXTATLAS

41% *Gen Z and Gen Alpha currently make up 41% of the global population[39]*

This group is practical and pragmatic. Disruptive economic events that young consumers lived through – like the global financial crisis and the COVID-19 pandemic – have made them more cost-conscious. They seek value but are also willing to splurge selectively on products and experiences that offer an engaging experience or speak to their values: 68% of young consumers feel it's important to treat themselves with things that give them pleasure, comfort, or joy.[44]

GLIMPSE INTO THE FUTURE

As Gen Z and Gen Alpha become core global consumer demographics, their values and preferences significantly impact the food and snacking markets. A stronger focus on sustainability and ethical production will become the norm, and a wider variety of global flavors and cuisines will appeal to the diverse multicultural tastes of younger consumers. Products with the right balance of affordability and indulgence will resonate with their pragmatic approach and the desire to treat themselves.

INCREASINGLY FLUID LIFESTYLES

The dynamic and flexible nature of modern lifestyle is shaped by changing living arrangements, evolving work patterns, and the growing role of home as the central hub of activities equipped with increasingly smart devices.

As consumers seek a balance between work, leisure, and personal commitments, there is a growing demand towards convenient, on-the-go, and versatile food and snacking options that cater to the new dynamic reality.

SNACKIFICATION

IMPACT

Moderate · Strong · Very Strong

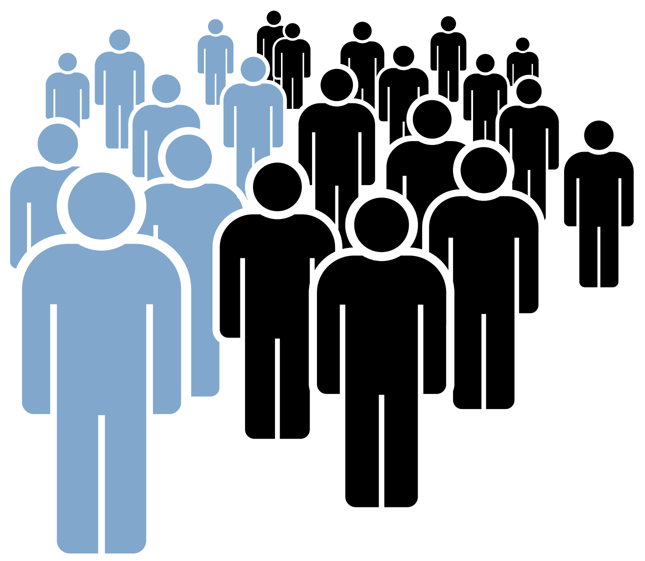
TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

39%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023



NEXTATLAS

Snacks provide convenience, flexibility, and time savings for today's increasingly busy consumers. The growing practice of "snackifying" regular meals is increasing demand for more balanced snacks that serve as adequate nutrition in convenient formats.

Snackification is the growing tendency to replace set meals with snacks among increasingly busy modern consumers: 67% of people globally figure out their meals in the moment versus planning them ahead of time.[47] This habit is driven by several social and economic factors.

Urbanization has a major impact with city inhabitants having longer commutes and increased workloads, leading to limited time for meal preparation: 37% of global consumers find cooking stressful.[48] Additionally, changing family structure and declining average household size also promote snackification, as single adults often follow different eating routines versus larger families. The rise of disposable income in developing markets has made a wider variety of snacks affordable for new middle-class consumers. Snackification is also driven by the changing behavior patterns in the digital age: increased screen time often requires multitasking and makes convenient on-the-go snacking a preferred choice for 53% of consumers.[49]

Snackification is further enhanced by the increasing popularity of "intuitive eating" and "grazing" practices, which promote the idea of eating in line with hunger signals instead of predefined and timed meals. It often involves eating smaller portions of food more frequently throughout the day, focusing on food quality and mindfulness in consumption. About six in 10 people surveyed said they prefer having smaller meals or snacks during the day instead of a few large ones.[50]

> "
> *14% of Gen Z and 12% of Millennials report regularly replacing meals with snacks vs only 6% of Boomers.[51] Snackification is likely to grow further, fueled by the influx of young urban middle-class consumers in developing markets and increasing availability of more nutritionally balanced snacks that are well positioned as meal replacement.*
>
> **– EUROMONITOR**

6 IN 10

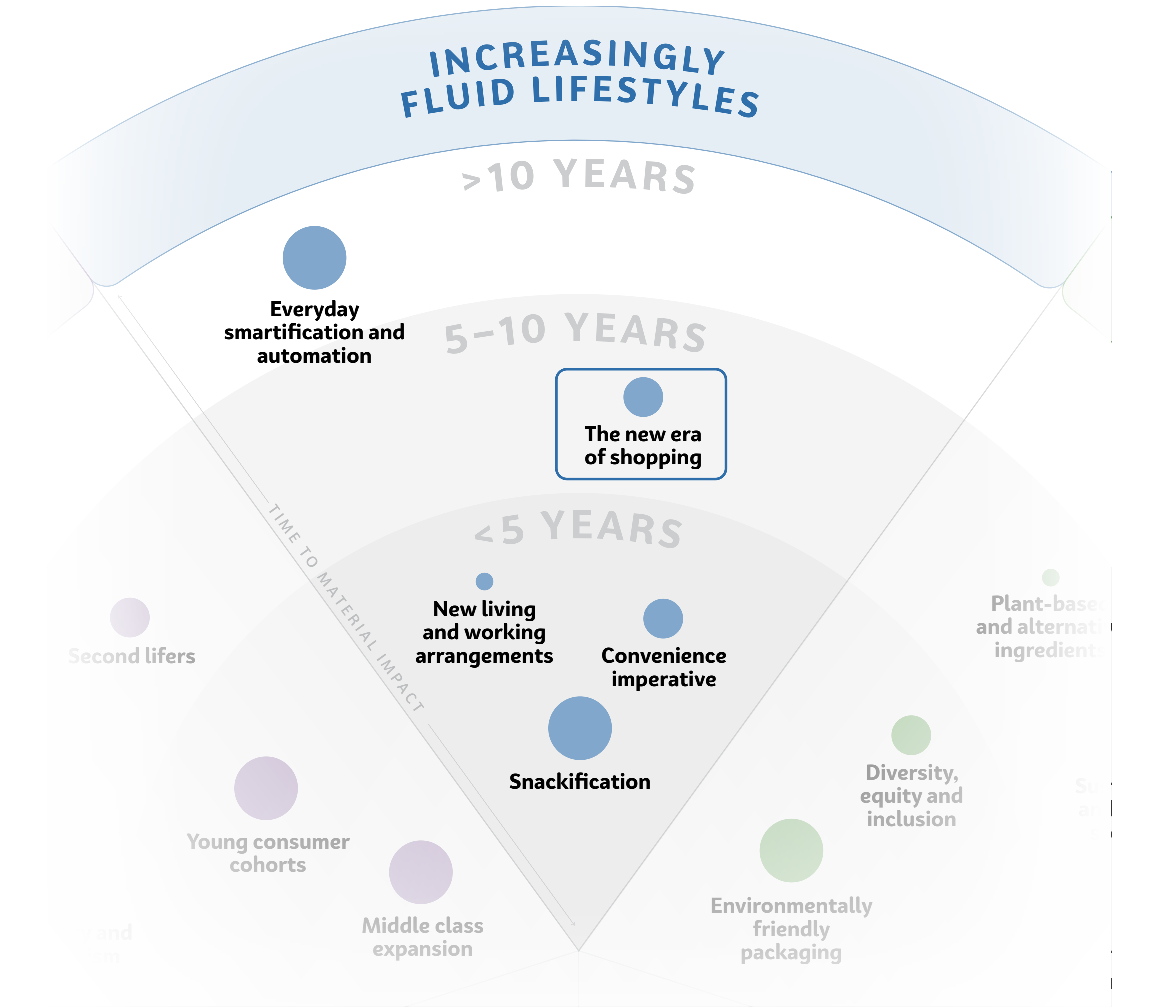
About six in 10 global consumers agree they prefer having smaller meals or snacks during the day instead of a few large ones[50]

While snackification makes snacks a popular format for hunger satisfaction, it does more than increase demand across all types of snacks. Snackification is leading to the rising popularity of products that have a more balanced nutritional profile, providing not only satiation but also nourishment. For example, breakfast bars made with muesli and granola have become popular alternatives to traditional breakfast meals, while protein-snack boxes and ready-to-eat soup cups are popular products for lunch and dinner.

GLIMPSE INTO THE FUTURE

Snackification increases demand for snacking products that provide a balance of convenience, taste, and nutritional value. With quick, convenient and on-the-go eating becoming more popular, a balanced nutritional profile, portable packaging, mess-free eating experience, and embedded portion options will become essential features for snack products that consumers view as meal replacement.

THE NEW ERA OF SHOPPING



IMPACT

Moderate · **Strong** · Very Strong

TIME TO MATERIAL IMPACT

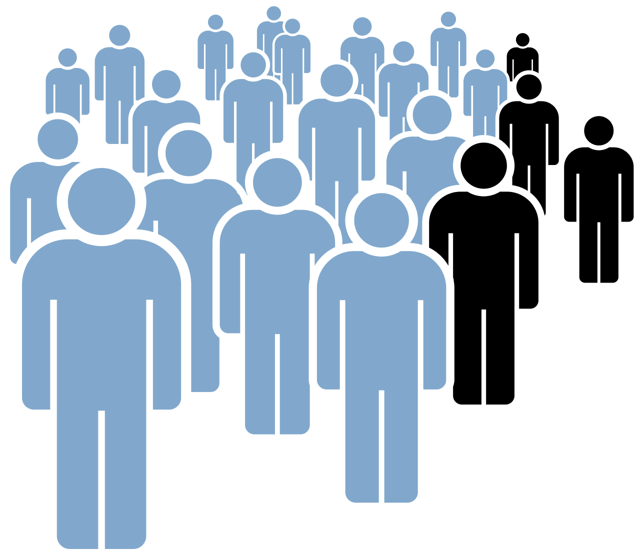
<5 Years · **5–10 Years** · >10 Years

TREND REACH

82%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS



Rapid technological advancement is changing the retail landscape and enhancing shopping by enabling instant purchases anytime and anywhere. It redefines shoppers' behavior and increases their expectations towards better convenience and a more positive shopping experience.

Commerce has undergone a disruptive change over the last two decades. The catalyst for this transformation is the widespread use of the internet and mobile technology, which enables a wide variety of new, more convenient shopping options: global e-commerce is predicted to grow by 9.4% in 2024, making up over 20% of total retail sales.[52] The rapidly evolving and increasingly competitive retail landscape increases consumer expectations, demanding a seamless shopping experience across multiple channels and platforms.

Integrated commerce has become a standard within modern retail, offering consumers a unified shopping experience across both digital and physical channels. Integration is not simply about adding an online presence on top of physical stores, but making both channels work together, enhancing the overall shopping journey. It's a powerful enabler for instant commerce that allows making immediate purchases nearly anytime or anywhere. Rapid delivery services for ecommerce and streamlined checkout and pickup options for physical retail are components that enable instant commerce.

Contextual commerce integrates the ability to make purchases into consumers' everyday activities and online interactions, such as using social media, cooking, watching video content or playing games. It makes shopping more relevant and efficient, tailoring experiences to individual consumer contexts: 74% of all consumers and 84% of Millennials and Gen Z said they have bought already or would buy a snack after seeing it online.[53]

> *ByteDance-owned social media platforms have leveraged their popularity with consumers into retail e-commerce success. Douyin and TikTok Shop have become livestreaming giants in China and Southeast Asia, respectively. In just three years, social commerce success has catapulted ByteDance who transformed from a relatively small e-commerce player into one of the major retailers.*[55]
>
> – EUROMONITOR

$2TN *By 2025, the global revenue generated by social commerce is expected to surpass $2 trillion USD*[54]

Meanwhile, social commerce integrates shopping with social media, transforming that digital platform into a marketplace for discovering and buying products. It benefits from social influence in purchasing decisions, a significant factor in the modern online shopping journey. Livestream shopping has become particularly popular, combining live video streaming with real-time interactions and purchases. By 2025, the global revenue generated by social commerce is expected to surpass $2 trillion USD.[54]

GLIMPSE INTO THE FUTURE

Leading retailers will further strengthen the integration of digital and physical operations to promote consistency in product offerings, pricing, and the customer experience. Through innovations in logistics and supply management they will continue to enhance rapid-delivery models. Successful brands will establish a robust presence in contextual and social commerce, increasingly embedding their products into relevant information channels and activities such as social media usage or online gaming.

EVERYDAY SMARTIFICATION AND AUTOMATION

IMPACT

Moderate · Strong · Very Strong

TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

73%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Initially limited to industrial and business applications, smart technologies and (semi)autonomous devices are increasingly entering households. They offer enhanced convenience and efficiency in managing daily tasks and personal routines with the potential to automate many of them, including grocery shopping.

The roots of smartification and automation of living spaces lie in the rapid advancements in technology, particularly high-speed always-on connectivity, IoT (Internet of Things), cloud computing and AI (Artificial Intelligence). Their combination leads to the growing presence of smart devices in homes, ranging from voice-activated assistants already used by 43% of the U.S. population,[56] to smart household appliances.

Smart devices offer unprecedented levels of convenience, efficiency, and control. They learn from user interactions, adapting and automating tasks to suit individual preferences. They are increasingly designed to work together, creating a cohesive and intelligent home ecosystem.

Smart devices and applications are simplifying household tasks, especially in areas like cleaning, cooking, and shopping. Smart refrigerators, for instance, do more than track inventory; they recommend recipes, influencing purchasing decisions and dietary habits. Voice-activated assistants are making online grocery shopping a more natural and convenient process: 77% of U.S. consumers who use smart home devices said they improved the overall quality of their life.[57]

> *Technology is making consumers lives easier, with over 7 in 10 global consumers stating that it helps them get ahead.[59] As consumer devices become 'smarter,' they are transitioning from merely sensing to anticipating. In the future, data collected by various devices will be integrated into complete personal profiles, unlocking nuanced needs and behavior predictions at a micro-level. Such ecosystems will be ubiquitous in the next iteration of connected life.*
>
> – KANTAR MONITOR

52% *of global consumers consider it important to have products and services that can anticipate their needs[58]*

Rapid advancements in AI hold even more disruptive potential. In the future, personalized AI assistants with access to personal data will have insights into individual consumers' routines and preferences, their health, and fitness state and goals. They will be equipped to create tailored nutrition plans, monitor calorie intake, and even autonomously manage grocery shopping to align with these personalized plans. This will likely be embraced by global consumers, as 77% of them are looking for ways to simplify their lives and 52% consider it important to have products and services that can anticipate their needs.[58] Smart AI assistants, in combination with household robotic devices, could potentially pre-cook meals, ensuring that each dish fits within the individual's dietary requirements.

GLIMPSE INTO THE FUTURE

This coming change promises disruption for marketing activities within the consumer-packaged goods industry, including food and snacking. As personalized AI assistants become more capable and autonomous, routine tasks such as grocery shopping will be increasingly delegated to them. This will require promotion strategies that are effective not only for people, but also for AI algorithms.

CONVENIENCE IMPERATIVE

IMPACT

Moderate · Strong · Very Strong

TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

64%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Convenience is becoming a defining factor in product and service selection for consumers due to increasingly busy lifestyles and the speed and efficiency offered by digital services. Consumers expect ultimate convenience along the entire experience journey, from product search and purchase to storage and waste disposal.

The rapid pace of modern life has heightened the importance of time-saving solutions. Consumers, faced with multitasking and packed schedules, favor products and services that simplify their daily routines and maximize efficiency: 70% of U.S. consumers said they would pay more for a product or service if they were guaranteed a convenient experience.[60]

Baseline expectations towards convenience have been further increased by the unprecedented level of convenience introduced by digital services. Innovations such as one-click and cashless payment options, internet banking, on-demand streaming services, and algorithm-based personalized social media feeds showed the possibilities of quick, easy, and accessible solutions. A staggering 94% of global consumers consider it important to have access to products and services when and where they need them, a convenience characteristic that mobile apps typically offer.[61]

Consumer expectations towards greater convenience extend to physical goods, including food and snacking products. Consumers increasingly expect enhanced convenience at every touchpoint associated with products: searching and comparing alternatives, accessing specific information, the purchase and delivery process, the packaging and eating experience, and storage and waste disposal. 65% of global consumers consider 'the ease to prepare' an essential or important factor when choosing food or beverage products,[62] while 52% of consumers think having an 'instant buy' button for all the snacks they discover on social media would be amazing.[63]

> *Convenience is a key decision-making factor for 40% of U.S. shoppers.[65] Focusing on the emotional reward associated with convenience and time saving often provides a powerful competitive advantage for both products and services.*
>
> – MINTEL

65% *of global consumers consider 'the ease to prepare' an essential or important factor when choosing food or beverage products[62]*

Consumers also increasingly favor products that offer holistic convenience: the right combination of nutrients, healthier options without compromise in taste and indulgence, convenient yet more environmentally sustainable packaging, and budget-friendly yet decent quality. More than 60% said they want food and beverage products that are simultaneously healthier and more affordable.[64]

GLIMPSE INTO THE FUTURE

As the underlying factors continue to intensify, the significance of convenience for consumers will only grow with time, promoting new products and services. From automated subscription services to smart packaging, the focus will be on providing a seamless, convenient experience that aligns with the consumer's desire for simplicity and efficiency.

NEW LIVING AND WORKING ARRANGEMENTS

IMPACT

• Moderate Strong Very Strong

TIME TO MATERIAL IMPACT

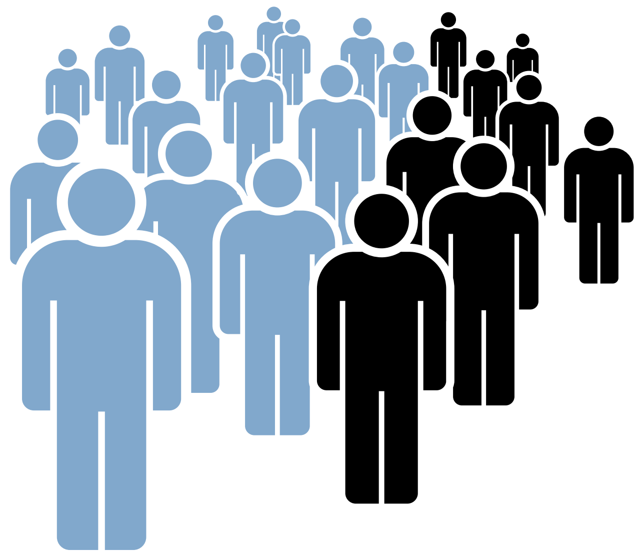
<5 Years 5–10 Years >10 Years

TREND REACH

66%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS



Living and working arrangements are changing for many people around the world. While the traditional nuclear family setup and the concept of leaving home for work and study remain prevalent, emerging demographic, economic and technological factors are shaping new ways of living and working, impacting everyday food and snack consumption patterns.

Historically, most people lived in nuclear family units, with houses and apartments designed for family time primarily during mornings and evenings. Work and study occurred outside home - in offices, work sites, schools, and universities. However, several factors changed these conventional arrangements.

The first one is delayed family formation and, therefore, home ownership. Over the past 50 years, the average age of women at childbirth increased by between 2 and 5 years in most OECD countries.[66]

Another factor is the increasing cost of living. Alternatives to family home ownership, such as cohabitation and communal living, are gaining popularity, especially among young adults. They offer economic advantages and a sense of community, diverging from the traditional single-family home model and changing living conditions for many.

> *Flexible working arrangements have impacted consumer rituals and routines. For many people morning rush hours and commuting have been replaced with new practices with conversations about 'morning affirmations' and 'breakfast' increasing in popularity by 97%[68] and 56%[69] YoY respectively. Growing need for new at-home routines that facilitate the transition from the 'professional self' to the 'after-work self' has increased the discussions about relaxing and unwinding properties of food and snacks (+30% YoY) for this purpose.[70]*
>
> – NEXTATLAS

41% *of people who work from home snack more between meals with 41% globally reporting an increase[67]*

The next is remote work and digital nomadism: the expansion of remote work options allows people to work effectively from any location. This flexibility has inspired some people to move from urban centers to rural areas or even different countries, embracing digital nomad lifestyles.

Consequently, the role of the home has evolved to encompass not just living but also working, studying, entertainment, shopping, and exercising. This change has been enabled by technologies like high-speed internet, video conferencing, ecommerce, online gaming, and streaming services. The transformation of homes into central hubs of activity was significantly accelerated by lengthy lockdowns during the COVID-19 global pandemic. This affected peoples' behavior including food consumption patterns. While working from home, people take more dedicated breaks, go out to brick-and-mortar stores less often, and snack more between meals with 41% globally reporting an increase.[67]

GLIMPSE INTO THE FUTURE

With more time spent at home, the demand for convenient, nutritious and versatile food and snacking options that fit various home activities will continue to increase. The popularity of snacks, meal kits, food delivery services and online grocery shopping will rise further, reflecting the need for versatile, in-home food options that fit into new living and working conditions.

PEOPLE AND PLANET IMPACT IMPERATIVE

Mounting concerns over environmental degradation, climate change and social injustice promote environmental awareness and ethical consciousness around the world.

With an increasing demand for sustainability and ethical sourcing, people look for food and snacking options that are not only good for them but also good for the planet and for those involved in their production.

SUSTAINABLE AND ETHICAL SOURCING

IMPACT

Moderate · Strong · **Very Strong**

TIME TO MATERIAL IMPACT

<5 Years · **5–10 Years** · >10 Years

TREND REACH

62%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Sustainable and ethical sourcing has become a critical consideration for many consumers in their food choices, driven by a growing awareness of the environmental and social impact of agriculture and food manufacturing. Consumers are increasingly looking for brands and products that strive to minimize their ecological footprint, support fair labor practices, and help local communities.

The roots of sustainable and ethical sourcing lie in the early environmental movements and fair-trade campaigns of the late 20th century. In the last two decades global attention to this topic has increased significantly, fueled by concerns about issues such as climate change, unethical labor practices and animal welfare.

Numerous studies and publications have highlighted the need for more sustainable agriculture, along with food production that aims to lessen environmental impact. Such publications and discussions in social media have increased consumer awareness of this topic.

Younger generations of consumers are especially worried, with 60% of Gen Zs and Millennials reporting feeling anxious about the environment.[71] These concerns influence purchasing decisions: 63% of global consumers are looking for snacks that minimize their environmental impact, with actions such as using carbon offsets, prioritizing local ingredients, and optimizing supply chains for sustainability.[72]

Ethical sourcing includes supporting fair wages, safe working conditions, local communities and workers within supply chains. It is a growing focus among consumers: 75% of consumers favor brands that are socially responsible on top of being environmentally friendly,[73] and nine in 10 global consumers prioritize buying from companies that have ethical sourcing strategies in place.[74]

> *In the U.S., 56% of consumers who are responsible for food and drink shopping say buying sustainable goods makes them feel good, and 43% are willing to pay more for such products.[75] Still, they rank taste, cost, and freshness as top factors impacting their choice.[76] As climate change concerns grow, sustainability as a purchase decision factor will further move from a "nice to have" to a "must have."*
>
> – MINTEL

63%

of global consumers are looking for snacks that minimize their environmental impact[72]

In response, companies are increasingly adopting more environmentally friendly agricultural practices such as regenerative farming, reduced use of pesticides, programs aimed at reducing water usage and soil degradation and making food production more ecologically viable. To enhance ethical sourcing, many companies audit their supply chains on fair labor practices and collaborate with local communities to help promote fair trade.

GLIMPSE INTO THE FUTURE

In the future, the supply chain structure will emphasize sustainability and ethical considerations in addition to traditional cost and efficiency metrics. Transparency and traceability will become a norm, with companies using technologies like blockchain to track the journey of products and ingredients. The preference towards more sustainable and ethical sourcing will continue driving the popularity of plant-based alternatives and locally sourced ingredients among consumers.

PLANT-BASED AND ALTERNATIVE INGREDIENTS

IMPACT

● Moderate ● Strong ● Very Strong

TIME TO MATERIAL IMPACT

<5 Years | **5–10 Years** | >10 Years

TREND REACH

43%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

The rising popularity of plant-based and alternative ingredients in the market reflects growing consumer focus on environmental sustainability and ethical consumption, as well as growing attention towards individuals' health and well-being. Climate change urgency, lasting consumer interest and considerable investments suggest a promising future for their wider adoption.

In recent years, the global community has become more aware and concerned about the negative effects of climate change and biodiversity loss, due to issues like deforestation, greenhouse gas emissions from livestock farming, and overfishing. In addition to environmental concerns, food sourcing and production have been increasingly associated with ethical issues such as animal welfare and labor conditions. As a result, consumers are seeking out more sustainable and ethically sourced alternatives, with plant-based food at the center of their attention; 66% view plant-based snacks as better for the future of the planet.[77]

Increasing attention towards individual health and wellness also plays a vital role in the rising popularity of plant-based and alternative ingredients. Potential health benefits associated with plant-based diets, such as lower risks of heart disease, obesity, and certain cancers, are widely publicized, so consumers are more willing to replace certain traditional ingredients with alternatives that are believed to be healthier. This has boosted the popularity of plant-based food and ingredients as part of a healthier lifestyle, with 57% of consumers saying they are trying to eat less meat and 46% actively reducing dairy consumption.[78]

> “ ”
>
> *Share of food products with plant-based claims have quadrupled in the last 5 years to 3.2% globally in 2023.[80] Rising public awareness of the perceived positive environmental impact of plant-based ingredients has and will continue to fuel interest in these products long-term. Moreover, growing discourse around the positive impact of plant-based ingredients like fiber on gut health[81] will further boost their perceived health credentials and help plant-based products tap into this emerging and important trend.*
>
> – MINTEL

66% *of global consumers view plant-based snacks as better for the future of the planet[77]*

Aside from alternative ingredients with a more optimal environmental footprint, advancements in food technology, like precision fermentation and cellular agriculture, lead to the development of novel ingredients. They aim to replicate the taste and texture of traditional ingredients, combining those with improved environmental and social impact. For example, cultured oils have the potential to replace palm oil associated with deforestation, and cellular meat can result in enhanced environmental and animal welfare while retaining a similar look and taste of traditional meat. Consumer interest and acceptance of novel ingredients is also growing: 62% of U.K. consumers said they are likely to try cultured meat.[79]

GLIMPSE INTO THE FUTURE

With climate change urgency and the attention towards individual health and wellness growing, consumer demand towards plant-based and alternative ingredient options will continue increasing. Combined with stricter environmental regulations, it will further incentivize food companies to invest in plant-based and alternative ingredients.

ENVIRONMENTALLY FRIENDLY PACKAGING

IMPACT

Moderate · Strong · **Very Strong**

TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

31%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

An increasing consumer and regulatory focus on environmental issues drives the transition to more sustainable packaging. While questions of cost and quality impact the adoption speed, many companies have already set clear goals for such a transition, making more sustainable packaging the industry's future standard.

Food packaging evolved from natural materials, like woven grasses, to more durable materials such as glass, metal, and ceramics. Eventually, synthetic materials like plastics were invented and widely adopted due to their functional qualities and low cost. However, some of these materials have been associated with environmental impact.

Plastic waste has drawn increased attention and raised concerns due to its scale and visibility. With the annual production of plastic standing at 400 million tons and predicted to double by 2040,[82] reducing its use and improving recyclability have become imperative. The U.S. Environmental Protection Agency has established that about 30% of municipal solid waste comes from packaging, including plastic.[83]

Rising awareness of the environmental impact of packaging waste prompts consumers to look for more sustainable packaging options; 50% of global consumers consider it important to buy products with reduced packaging,[84] 59% of consumers look for recycling or sustainability information on packaging, and 82% are willing to pay more for sustainable packaging.[85]

> *Consumers are increasingly concerned about the negative effects of climate change and environmental pollution, which impacts their attitude towards packaging.[89] Plastic is in the spotlight, given its visibility and contribution to total waste. In 2023, about half of global consumers stated they are ready to contribute to a positive change by reducing plastic use, recycling and using sustainable packaging.[90] However, despite this intent, only a third actually choose products with sustainable packaging with 40% citing high prices as a barrier to purchasing those products.[91]*
>
> **– EUROMONITOR**

82%

of global consumers are willing to pay more for sustainable packaging[85]

Around the world, governments are enacting legislation aimed at reducing packaging and plastic waste. Notable examples include the EU's recent ban on single-use plastic products[86] and the draft "National Strategy to Prevent Plastic Pollution" developed by the U.S. Environmental Protection Agency, which contains ambitious actions to eliminate the release of plastic and other waste from land-based sources into the environment by 2040.[87]

Technological innovations expand the scope of renewable, biodegradable packaging materials. For example, materials produced from natural or upcycled ingredients like sugar, rice, banana peels, and seaweed, can be used in films, bags, and other packaging items.[88]

GLIMPSE INTO THE FUTURE

Environmentally friendly food packaging is becoming an increasingly important factor for global sustainability and maintaining market relevance and brand loyalty. Although sustainable packaging ambitions are outlined by many companies, industry-wide transition will take time. Despite cost and quality barriers, the food industry increasingly moves towards using entirely reusable, recyclable, or compostable packaging.

FOOD WASTE REDUCTION

IMPACT

Moderate · Strong · Very Strong

TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

44%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Awareness and acknowledgement of food waste as a global issue promotes the development of waste reduction and upcycling programs. Their activation contributes to strong environmental, social, and economic benefits and deeply resonates with modern consumers.

Food waste is a longstanding global concern. It comes primarily from two sources: food supply chain waste from farms to retail, and waste of purchased food products by consumers. The cost of food waste is substantial: about one-third of annual global food volume — sufficient to feed three billion people — is wasted.[92] Agricultural and food-processing losses amount to approximately half of all waste. In the U.S. alone, farms lose up to 13 million tons of food produce annually due to factors like weather, pests, and micro-organisms.[93] The foodservice and retail sectors also play a major role.[94]

Consumer-generated waste contributes significantly to total food waste, often generated due to inefficient shopping habits and the expiration of unused food products.[95] Awareness is high, as 72% of consumers recognize the issue[96] and 80% are careful to avoid waste when cooking/planning meals.[97] According to a recently published study, cradle-to-grave emissions from food loss and waste represent half of total greenhouse gas emissions from food systems.[98] Therefore, reducing food waste will also help decrease the food industry's environmental impact.[99] Regulators are increasingly adopting policies aimed at reducing food waste, such as the U.S. Environmental Protection Agency's program to reduce food waste by half by 2030.[100]

> *77% of U.S. grocery shoppers agree food waste is as big of a problem as packaging waste, driving popularity of upcycled products.[101] 40% of Spanish, 39% of French and 38% of Italian adults agree condiments or dressings made with upcycled ingredients would be appealing to them.[102] Considering this, in the coming years, we expect more product launches made with upcycled ingredients.*
>
> – MINTEL

1/3 *About one-third of annual global food volume — sufficient to feed three billion people — is wasted[92]*

One of the ways to help tackle food waste is through upcycling, which involves transforming by-products or food waste materials into new products. This includes creating new food products from ingredients like spent grains from brewing, pulp from juiced fruits and vegetables, or misshapen but perfectly edible fruits and vegetables. Upcycling helps reduce waste and offers economic value, turning what was once considered waste into profitable products.

GLIMPSE INTO THE FUTURE

In the years ahead, food waste reduction driven by increased consumer attention and regulatory policies will positively affect the industry's environmental footprint, leading to more efficient use of resources like land and water. There will be a proliferation of innovative solutions tackling food waste, including novel preservation and upcycling technologies.

DIVERSITY, EQUITY, AND INCLUSION

IMPACT

Moderate · Strong · Very Strong

TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

47%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Movements against discrimination, inequality, and exclusion have become a powerful force in helping to combat societal injustices. Rising awareness, changing values, and increasing activism have made diversity, equity, and inclusion (DEI) a significant part of modern society's behavior code, raising expectations towards businesses and brands.

The push for respecting and enabling diversity, equity and inclusion can be traced back to various historical movements for civil rights and social justice. Today, DEI stands for not only the absence of discrimination but also for providing equal opportunities and outcomes for people with various backgrounds and identities. Accelerated by globalization and the influence of international media and social platforms, DEI has become a global phenomenon.

DEI adoption has been associated with positive effects on businesses. According to a recent study, companies with ethnically and gender-diverse executive teams increase the likelihood of above-average profitability.[103] Consumers favor businesses and brands that support DEI; 75% globally believe businesses have a responsibility to make society fairer,[104] and 59% prefer to buy from brands that stand for diversity and inclusion in online advertising.[105]

Beyond consumer appeal, governments have adopted regulations designed to promote diversity and protect against discrimination, such as the European Accessibility Act, and a number of other mandates related to gender representation on corporate boards.[106]

> “ ”
>
> *Consumers expect businesses to help promote fairness in our society. Globally, 6 in 10 people agree that it is important to them that companies they buy from actively promote diversity within their business practices and society as a whole.*[108]
>
> – KANTAR MONITOR

75% *of consumers globally believe businesses have a responsibility to make society fairer*[104]

DEI promotes more inclusive and intersectional product development and marketing as an increasingly diverse consumer base demands attention on a wide array of cultural nuances, identities, and lifestyles. Inclusivity in product development and marketing materials is becoming crucial for brands to appeal to growing ranks of value-driven consumers, particularly among younger generations: 18-to-25-year-olds were most likely to take note of inclusive advertising when making purchase decisions.[107]

The diversity imperative is also influencing workforce and supplier networks. Hiring practices aim to create teams with individuals from diverse backgrounds, encouraging open, innovative environments. Industry supply chains are becoming more multifaceted, drawing from a diverse global pool of suppliers.

GLIMPSE INTO THE FUTURE

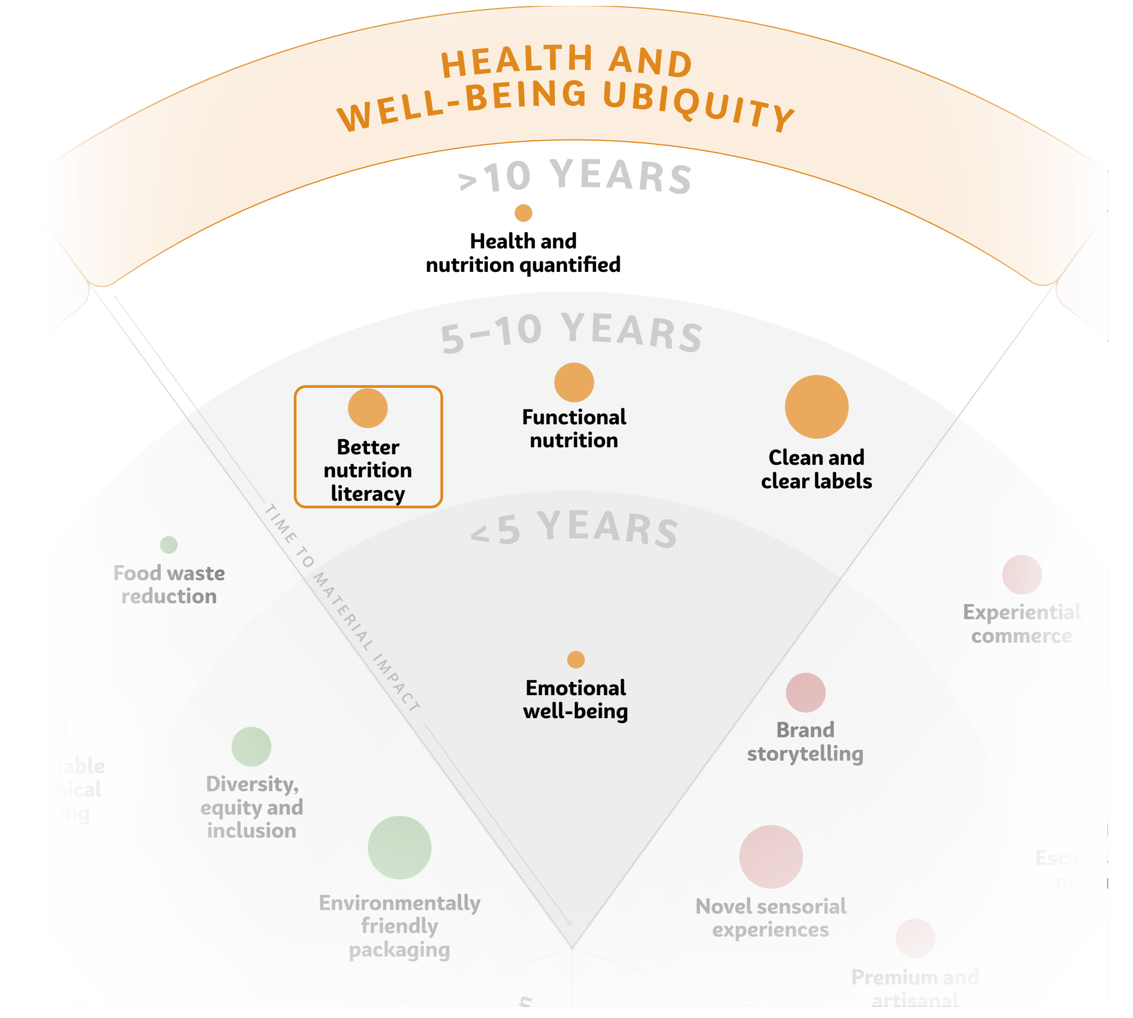
DEI will become an essential consideration for all business operations. It will help increase diversity in the workforce and supplier network, will strengthen DEI principles in product innovation and marketing narratives, and will further promote transparency and accountability of DEI initiatives.

HEALTH AND WELL-BEING UBIQUITY

Amidst the fast-paced and stressful nature of modern life, people are placing greater emphasis on personal health and overall well-being, recognizing the key role of nutrition.

Equipped with increasingly smart health and nutrition monitoring apps and devices, they balance their diet with a mix of nutritious and indulgent food and snacking options that help support holistic well-being, and emotional comfort.

BETTER NUTRITION LITERACY



IMPACT

Moderate | Strong | Very Strong

TIME TO MATERIAL IMPACT

<5 Years | 5–10 Years | >10 Years

TREND REACH

33%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Increasing literacy on nutrition has empowered consumers to make informed choices about what, when and how to eat. This drives the popularity of mindful eating, healthier options, and functional food.

The relationship between food and health has been known for centuries, yet more scientific approaches to nutrition appeared later in the 20th century with the development of natural sciences. The discovery of macronutrients, vitamins and minerals has led to the emergence of detailed dietary guidelines. Over the last couple of decades, nutrition literacy has been on the rise globally, driven by several factors.

The most important factor is access to information: the internet and social media have exponentially increased the availability of a broad range of nutrition and dieting information and advice, from scientific publications to celebrities' and influencers' personal eating routines. Specific educational initiatives that governments and health organizations worldwide undertake to promote healthy eating also play a role.

Another key factor is a global increase in lifestyle diseases such as obesity and diabetes and a growing understanding of the role of nutrition to help support prevention and management. This has placed dietary choices in the spotlight for increasingly health-conscious consumers. The global mental health crisis has further fueled the interest towards nutrition, due to recent findings claiming an association between foods, gut health and mental well-being.[109]

Food product labels are important sources of nutritional information: nearly 80% of U.S. consumers reported they regularly used the Nutrition Facts panel when deciding to buy a food product.[110] Simplification and standardization of on-pack nutrition labels further promote nutritional literacy among consumers, making information about critical nutrients potentially easier to find and understand. Multiple countries have implemented mandatory national food labeling systems with others considering such a step.

> *"Consumers' nutritional knowledge is becoming more nuanced, driving the growing interest in advanced and complex topics. In 2023, we witnessed significant growth in popularity for metabolic health and metabolic-friendly food (+58% YoY in social media mentions),[112] and hormone-balancing diets (+204% YoY).[113] Therefore, we expect to see more products with ingredients and claims addressing these specific consumer interests in the future."*
>
> – NEXTATLAS

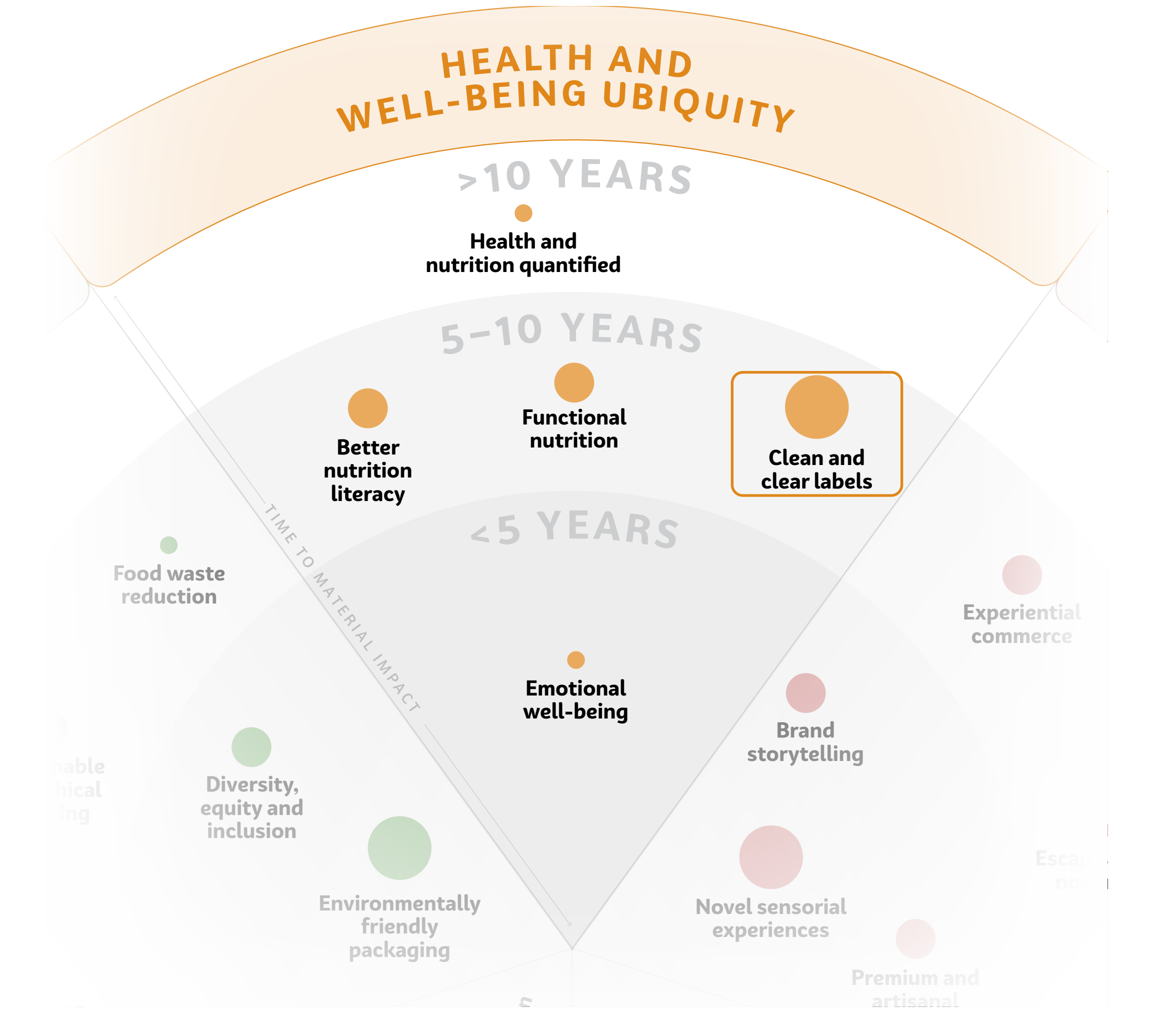
560MN *In 2022, there were 560 million health and nutrition apps users globally[111]*

Finally, the rising popularity of wearables and fitness and nutrition apps also contribute to the increase in nutritional literacy, bringing in personalized nutrition information and recommendations. They often go beyond static information, making nutrition engaging, interactive and social. In 2022, there were 560 million health and nutrition apps users globally.[111]

GLIMPSE INTO THE FUTURE

Improvements in nutrition literacy will help consumers feel more empowered to make informed choices based on their individual needs and preferences. This will further strengthen the focus on healthier and more balanced diets and will drive the popularity of functional and personalized food options.

CLEAN AND CLEAR LABELS



IMPACT

Moderate | Strong | Very Strong

TIME TO MATERIAL IMPACT

<5 Years | 5–10 Years | >10 Years

TREND REACH

59%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Driven by the growing focus on better nutrition and sustainability, clean and clear label claims resonate with consumers, positively impacting demand

Better informed about how nutrition impacts health and well-being, consumers increasingly favor products they perceive will help them meet their needs. To find such products on store shelves, they turn to product labels: 43% of global consumers check product ingredients while shopping.[114]

There is no formal regulatory definition of a 'clean' or 'clear' label – it is largely based on consumer perception. Initially, 'clean label' for food products was understood as the absence of ingredients perceived negatively, such as artificial additives, colorants, and those with difficult to pronounce names. Over time, the term's meaning has evolved to include the absence of certain allergens as well as 'clear' features: simple and easy to understand information about ingredients, their origin and processing that confirms ethical sourcing and manufacturing practices. In some markets, the interpretation of clean label also includes adherence to certain product certification standards with religious or cultural backgrounds, such as Halal or Kosher.

Numerous studies confirm that a sizable share of shoppers are willing to pay more for products they perceive to have clean and clear label features. 78% of respondents said they will pay extra for products with "natural / all-natural" claims.[115] This is confirmed on the supply side as well: a

> *When choosing food and drink products, consumers increasingly pay attention to the ingredients, looking for balanced nutrition and natural origin. Among the steps taken to eat better, 51% of French consumers agree they limit sugar intake, while 51% avoid products with artificial additives (e.g. artificial sweeteners, flavors).[118] Considering the evolving consumer expectations from food such as convenience, variety, access, sustainability, etc., educating consumers about the benefits and fit of processed foods in meeting personal and planetary health is an opportunity.*
>
> – MINTEL

43% *of global consumers check product ingredients while shopping[114]*

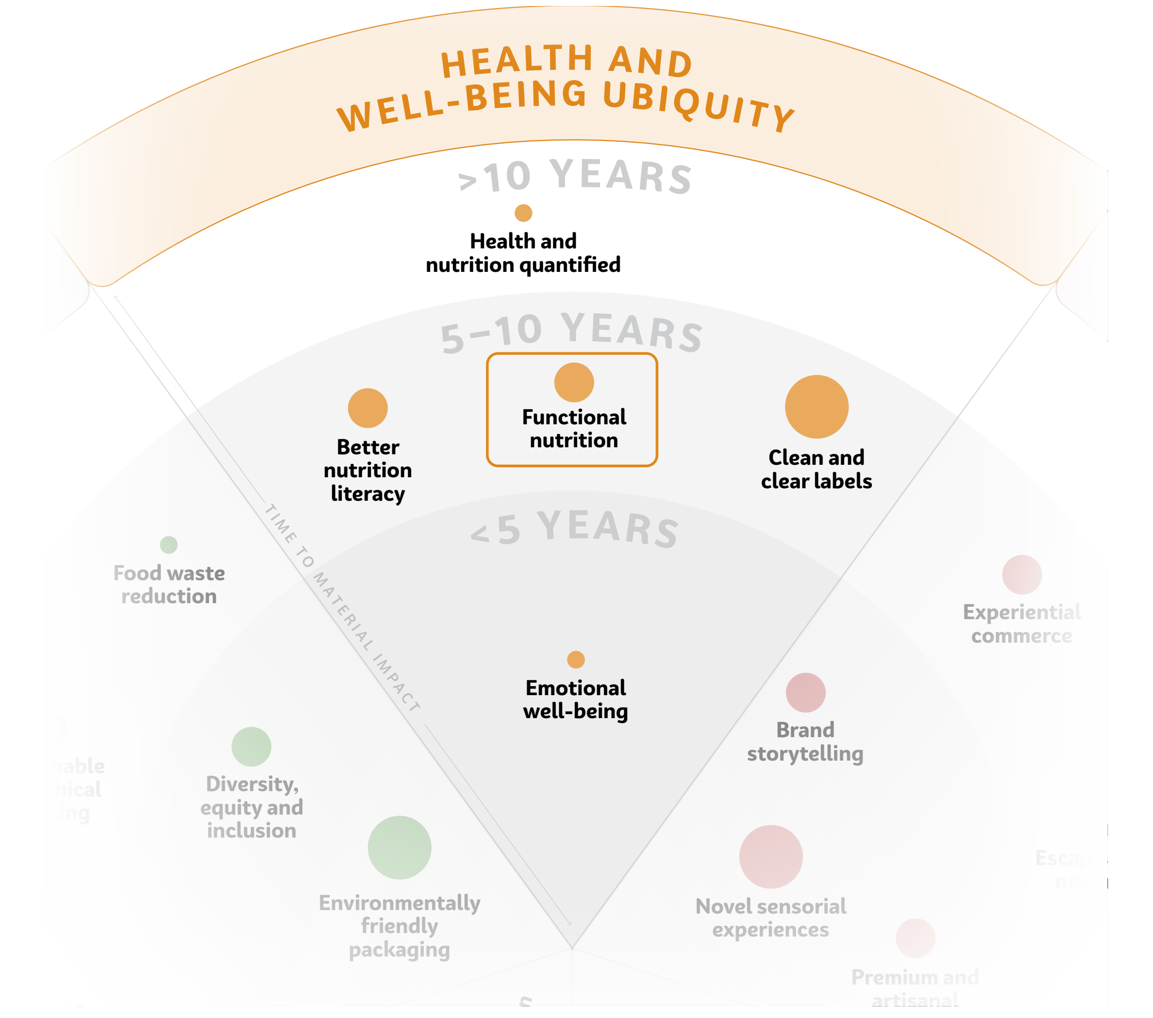
U.S.-based study found that converting products to clean label led to average self-reported gains of 15% in overall revenue, 11% in margins and 18% in product pricing.[116]

The importance of further improving on-pack information is underscored by the fact that about 57% of global consumers feel increasingly skeptical of the claims made by brands on packaging and in advertisements. Roughly the same share considers trust and transparency for brands extremely important.[117]

GLIMPSE INTO THE FUTURE

Increasing attention to individual health and wellness, growing concerns about environmental sustainability and ethical sourcing, and increasingly multicultural societies will continue driving the popularity of perceived clean and clear labels for food products.

FUNCTIONAL NUTRITION



IMPACT

Moderate · Strong · Very Strong

TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

28%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Functional nutrition, driven by a growing focus on individual health and well-being, has become a global phenomenon covering increasingly diverse consumer needs, from mental and physical health to beauty. Advancements in food technology will widen functional product ranges and can make them more effective.

The origin of functional nutrition can be traced back to the early 1980s, when the concept of 'functional food' was introduced by the Japanese academic society.[119] Since then, the idea of functional eating has gained momentum, as consumers increasingly look for products with ingredients that have specific action or health benefits. About 90% of American adults look for functional benefits in their food and beverages.[120] This has led to the emergence of a sizeable global functional nutrition market, which is projected to exceed $210 billion USD by 2028.[121]

The growth of functional nutrition is the result of increasing consumer awareness about the impact of nutrition on health and well-being. As part of proactive health and well-being management, consumers are looking for food products that support their health and wellness needs and goals: 42% of global consumers snack to take care of their body and nutritional needs.[122]

These include targeted health benefits, such as support for brain, gut, heart and bone health, improving immunity, and more general age- and gender-related health benefits, such as assisting early years growth & development for children, supporting healthy aging, and improving specific aspects of women's health. Pre-and probiotics, Omega-3 fatty acids, whole grains, fiber, protein and a variety of vitamins and minerals are popular ingredients for health-related functional food and supplements. Other popular consumer needs are energy and physical activity support. Protein-rich powders and snacks and sports hydration drinks with electrolytes address them.

> *Functional nutrition is increasingly important to consumers: 42% of U.S. adults prefer food and drinks that contribute to their mental and physical health.[123] In China, 61% of consumers plan to consume more nutritious food/drink in the next year.[124] Within this trend, there's a nuanced shift towards what consumers perceive as trusted ingredients. For instance, 84% of consumers in China prefer drinks with natural health benefits, highlighting a preference for inherent functionality over added ingredients.[125]*
>
> – MINTEL

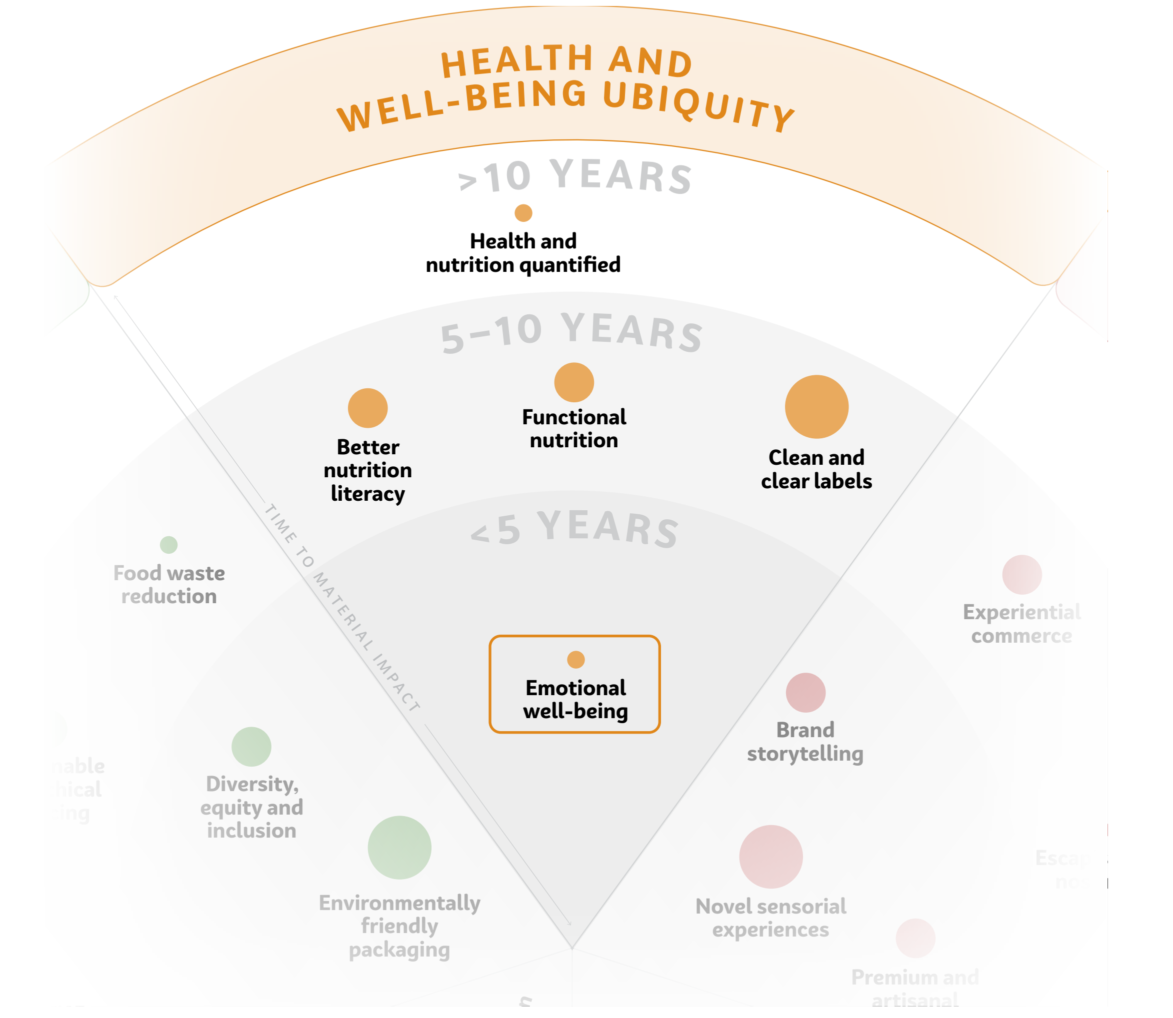
42% *of global consumers snack to take care of their body and nutritional needs[122]*

In recent years, due to increasing stress and mental health concerns, products with ingredients like vitamins B and D, zinc and magnesium that support mood and cognitive function have grown in popularity. Another category within functional nutrition is beauty-related: it includes products claiming to improve the health of skin, hair, and nails, with ingredients like collagen, biotin, silica, hyaluronic and amino acids.

GLIMPSE INTO THE FUTURE

Increasing attention on health and well-being will continue driving the popularity of functional nutrition. The latest advancements in food processing and formulation, such as microencapsulation, nanotechnology, fermentation, and plant-based and alternative proteins will expand the range of functional nutrition products and have the potential to improve their effectiveness.

EMOTIONAL WELL-BEING



IMPACT

Moderate | Strong | Very Strong

TIME TO MATERIAL IMPACT

<5 Years | 5–10 Years | >10 Years

TREND REACH

83%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Mental wellness is becoming increasingly significant in the context of the fast-paced modern world. Consumers are recognizing the importance of taking breaks and the positive impact that mindfulness and indulgence can have on their emotional well-being. Combined with the rising attention on healthy eating, this increases the popularity of permissible indulgence and portion control.

With stress and fatigue growing due to increasingly hectic lifestyles and information overload, emotional wellness has become a top priority for global consumers: 47% report suffering from stress, and 74% consider taking active steps to maintain or improve their mental well-being as very or extremely important.[126]

One such active step is taking regular breaks throughout the day for a brief mental escape from the pressures of everyday life. 76% of consumers globally consider taking the time to slow down and relax important or very important.[127] Snacks, especially indulgent ones, often complement such breaks, serving as emotional uplift and refresh that help with the stress relief; 74% of consumers claim to snack regularly for mood improvement.[128] In another study, 61% consider it important to treat themselves to pleasure, comfort and joy, and 85% say they are likely to buy products or services that will enhance their sense of emotional well-being and relaxation in the next year.[129]

> *When looking for emotional gratification from indulgent snacks, consumers increasingly take into consideration the perceived impact on their well-being and budget. We observe the rising interest towards 'glimmers' and micro-moments of joy (+74% YoY in social media mentions).[132] 'Little treats', 'little sweet treats' and 'bite-sized treats' are also trending, suggesting increasing popularity of portioned indulgent snacks and desserts.*
>
> – NEXTATLAS

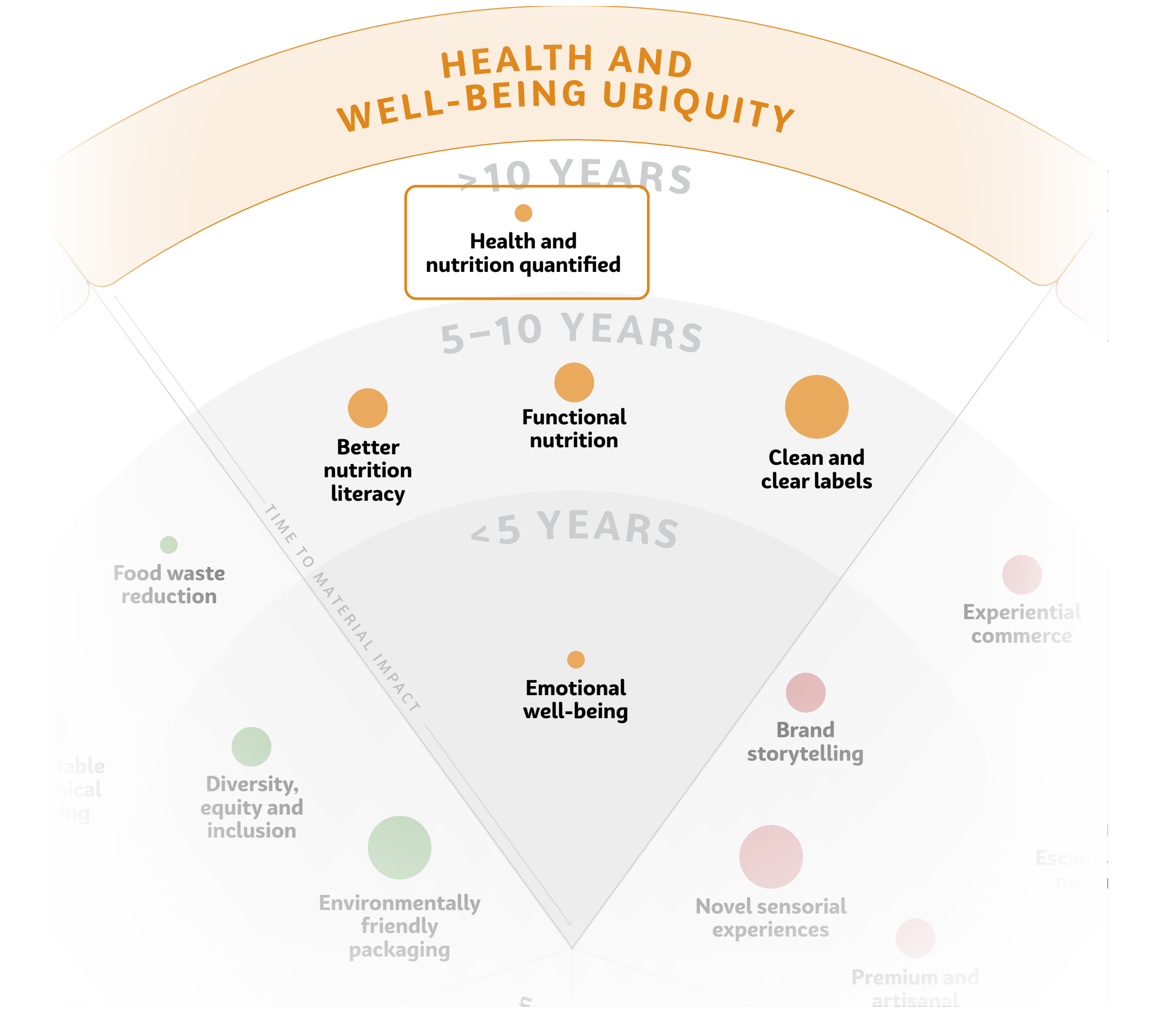
74% *of global consumers claim to snack regularly for mood improvement[128]*

At the same time, today's consumers are also increasingly health-conscious, looking for a balance between indulgence and nutrition. Seven out of 10 said a balanced diet is important to them.[130] Another way consumers achieve the balance between indulgence and healthy eating is portion control: 70% of consumers prefer mindful portions of indulgent snacks over larger portions of low fat or sugar alternatives.[131] This underscores the increasing popularity of more conscious and permissible indulgence, moving away from the view of indulgence as a guilty pleasure.

GLIMPSE INTO THE FUTURE

In an increasingly complex and uncertain world, consumers will continue integrating mindful indulgent experiences into daily life as a way to enhance emotional well-being. Improvement in nutritional literacy will lead to a more holistic understanding of health, where mental, emotional, and physical well-being are interlinked, and mindful indulgence is increasingly viewed not as excess, but as part of a balanced and fulfilling lifestyle.

HEALTH AND NUTRITION QUANTIFIED



IMPACT

• Moderate • Strong • Very Strong

TIME TO MATERIAL IMPACT

<5 Years | 5–10 Years | >10 Years

TREND REACH

45%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS

Advancements in sensing and wearable technologies, image recognition and artificial intelligence converge to enable next-level health and nutrition monitoring together with highly personalized nutrition guidance. This will create a substantial personalized nutrition market, presenting considerable opportunity in the future.

Activity and health monitoring, driven by advancements in wearable technology, give consumers previously unimaginable levels of information and insights about their physical well-being. Wearable devices, which track a variety of health and fitness-related indicators from steps to cardiovascular health, are becoming mainstream. Rapid consumer adoption is enhanced by existing demand and positive consumer experience, judging by the fact that 72% of global consumers would like to monitor their health more effectively,[133] and 70% of wearable device owners in the U.S. say their fitness and health have improved as the result of device usage.[134]

By 2027, the global market for fitness trackers is projected to reach $92 billion, reflecting the growing interest towards health and fitness measurement.[135]

A variety of consumer-grade smart devices are also entering households. Smart scales measure and track changes in body composition, smart breath analyzers provide information about metabolic processes and digestion, and smart blood monitors continuously measure blood pressure and composition, such as oxygen saturation, levels of glucose and cholesterol.

> *56% of global consumers believe it is important to have the tools to monitor their own health on a regular basis.[137] This sentiment is inspiring a new wave of wearable health trackers that use the latest technological advancements in sensing and measurement to monitor complex vital signs for health.*
>
> **– KANTAR MONITOR**

74% *of consumers say they would like to have snacks tailored specifically to their personal health and nutritional needs[136]*

Thanks to the advancements in optical sensing and image recognition technology, calorie and nutrition tracking apps are gaining the ability to more accurately estimate the amount, caloric value and nutritional composition of food using smartphone cameras. This drastically simplifies the process of nutrition tracking and can increase its popularity among health- and wellness-conscious consumers.

While the advancements in health and nutrition monitoring and quantification are impressive enough on their own, their synergy, when combined and augmented with AI-driven analysis, has the potential to provide consumers with next level insights, including customized nutrition recommendations aligned with their personal health and fitness goals. The interest in such technology is high, as 74% of consumers say they would like to have snacks tailored specifically to their personal health and nutritional needs.[136]

GLIMPSE INTO THE FUTURE

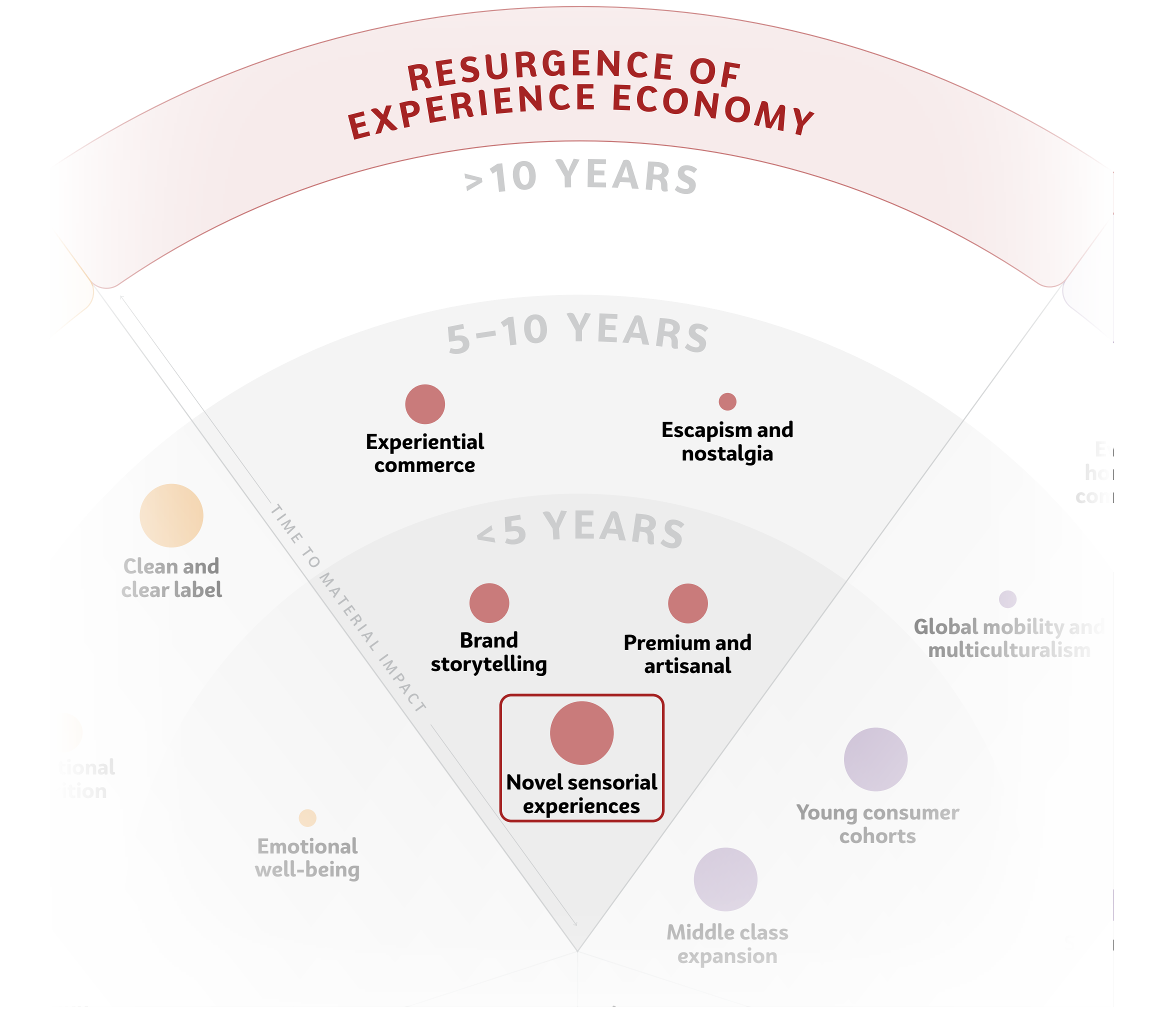
Continuous health and nutrition monitoring will become ubiquitous in the long term, affecting people's diets and lifestyles. Significant consumer interest towards personalized nutrition will lead to the emergence of a substantial personalized nutrition market when technologies will enable it to become scalable and economically viable.

RESURGENCE OF EXPERIENCE ECONOMY

In the growing complexity and uncertainties of daily life, people are increasingly prioritizing the joy of experiences over material possessions by seeking memorable events and exciting interactions.

This changes how they approach snacking, with a greater emphasis on enjoyment, exploration of both new and revisiting the past, unusual and unique sensorial experiences, storytelling, and social aspects of food.

NOVEL SENSORIAL EXPERIENCES



IMPACT

Moderate · Strong · Very Strong

TIME TO MATERIAL IMPACT

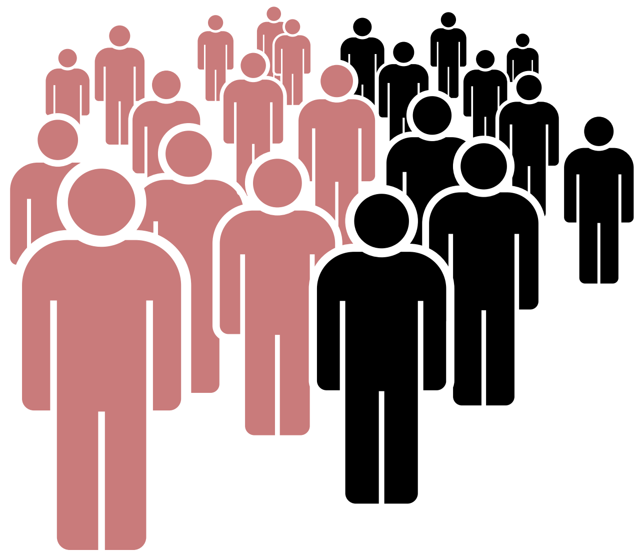
<5 Years · 5–10 Years · >10 Years

TREND REACH

56%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS



As modern consumers increasingly prioritize experiences over possessions, food and snacks offer exciting and affordable experiential adventures into taste and flavor. This further inspires a variety of ingredients, flavors, and flavor combinations.

Among significant shifts in consumer behavior and values, especially among younger generations, there is a growing preference for spending on experiences; 53% of consumers globally consider prioritizing experiences over material possessions important for their personal lives.[138] In the modern world, food – with its rich cultural background and diversity of options – is becoming a medium for memorable moments and social sharing. Notably, 63% of consumers globally enjoy experimenting with new food.[139]

Interest in food exploration and experiences are on the rise for several reasons. One is the desire to express one's personal identity. Consumers are increasingly viewing their food choices as a reflection of their personality and lifestyle, as 68% of consumers globally consider food and dining their hobby and passion; with an even higher share among younger consumers.[140]

Another noteworthy movement is the significant food exposure within television and digital media. Culinary reality shows remain popular. Social media platforms like Instagram, with millions of posts tagged with food-related hashtags,

> *We observed 'rich', 'intense', 'unique', 'adventurous' and 'unexpected' flavors and taste profiles trending in social media in 2023 (+91% YoY).[142] Apart from looking for novel flavors and taste sensations, consumers are also exploring unconventional combinations (+72% YoY),[143] such as bitter notes in desserts and salted and savory soda drinks.*
>
> – NEXTATLAS

74% *of consumers say the novelty of flavor and texture combinations are important when choosing a snack*[141]

enhance the importance of food's visual appeal and the demand for visually worthy experiences. As a result, the popularity of diverse textures, shapes, and flavors is on the rise – 74% of consumers say the novelty of flavor and texture combinations are important when choosing a snack.[141]

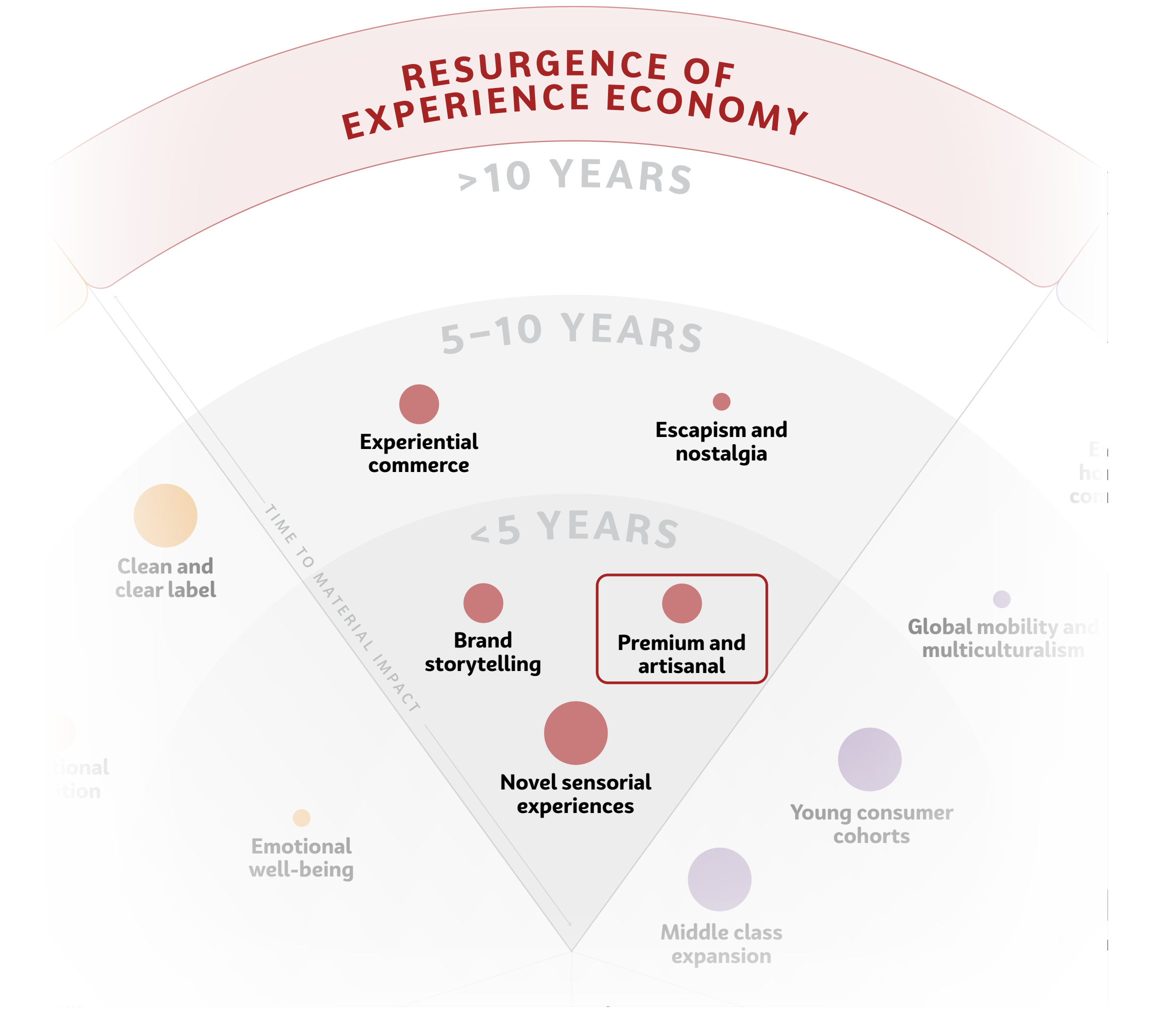
An increasing focus on health, well-being, and rising interest towards functional food also promote use of novel flavors and ingredients such as natural sweeteners, ancient grains and botanicals, mushrooms, and exotic fruits.

Finally, affordability also plays a key role. Food offers an accessible way for novel experiences. Even when dining out is reserved for special occasions, a variety of flavors from favorite snack brands offer a path to a sensorial adventure.

GLIMPSE INTO THE FUTURE

Consumers' desire for novel sensorial experiences will further drive innovation in flavor profiles, ingredients, and presentation in the market. The latest developments in food technology have the potential to bring entirely new ingredients, flavors, and taste sensations into the mainstream.

PREMIUM AND ARTISANAL



IMPACT

Moderate · Strong · Very Strong

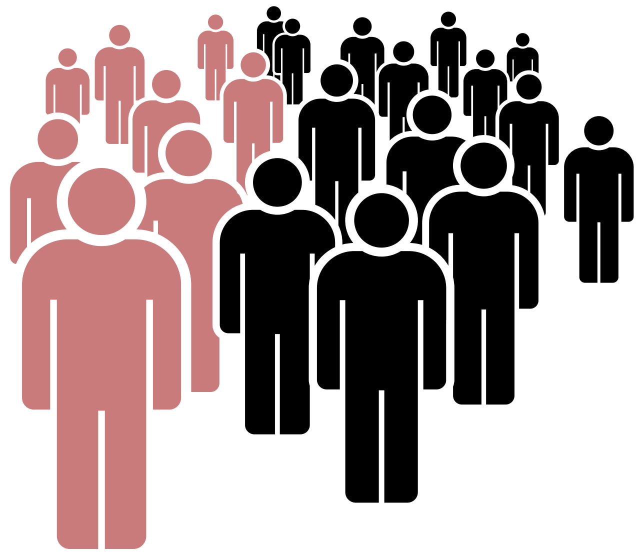
TIME TO MATERIAL IMPACT

<5 Years · 5–10 Years · >10 Years

TREND REACH

35%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023



NEXTATLAS

Despite consumer concerns over inflation and the rising costs of living, the interest towards premium and artisanal food products continues to grow worldwide, driven by a variety of demographic and societal factors.

Artisanal food production dates to ancient times, when farmers and craftsmen created food products from locally available ingredients using traditional, often well-guarded, methods. The industrial revolution drastically increased the affordability and shelf life of food, yet mass-produced food products have lost the uniqueness and the sense of craftsmanship that artisanal foods offer. In recent decades, there has been a steady rise of interest towards artisanal and premium food and snacks due to several factors.

New entrants to the global middle class – mostly young urban professionals in Asia – trade up to higher-quality goods that reflect a certain lifestyle and status, including food and snacks. 53% of Indian and 42% of Chinese consumers said they seek more luxury, even in everyday products, versus the 24% global average.[144] Simultaneously, the growing ranks of mature consumers also contribute to premiumization. They spend 1.3 times more per occasion on e-groceries than younger consumers, reflecting a preference for higher priced products.[145]

> *Product launches with premium and artisanal claims saw an 18% increase in 2023 vs prior year.[149] This growth reflects an interest in artisanal, premium-priced food products. Our experts predict that the rise of AI might cause a fatigue and longing for the "human-made" that will further boost the popularity of artisanal products and ingredients.[150]*
>
> – MINTEL

53% *of Indian and 42% of Chinese consumers said they seek more luxury, even in everyday products[144]*

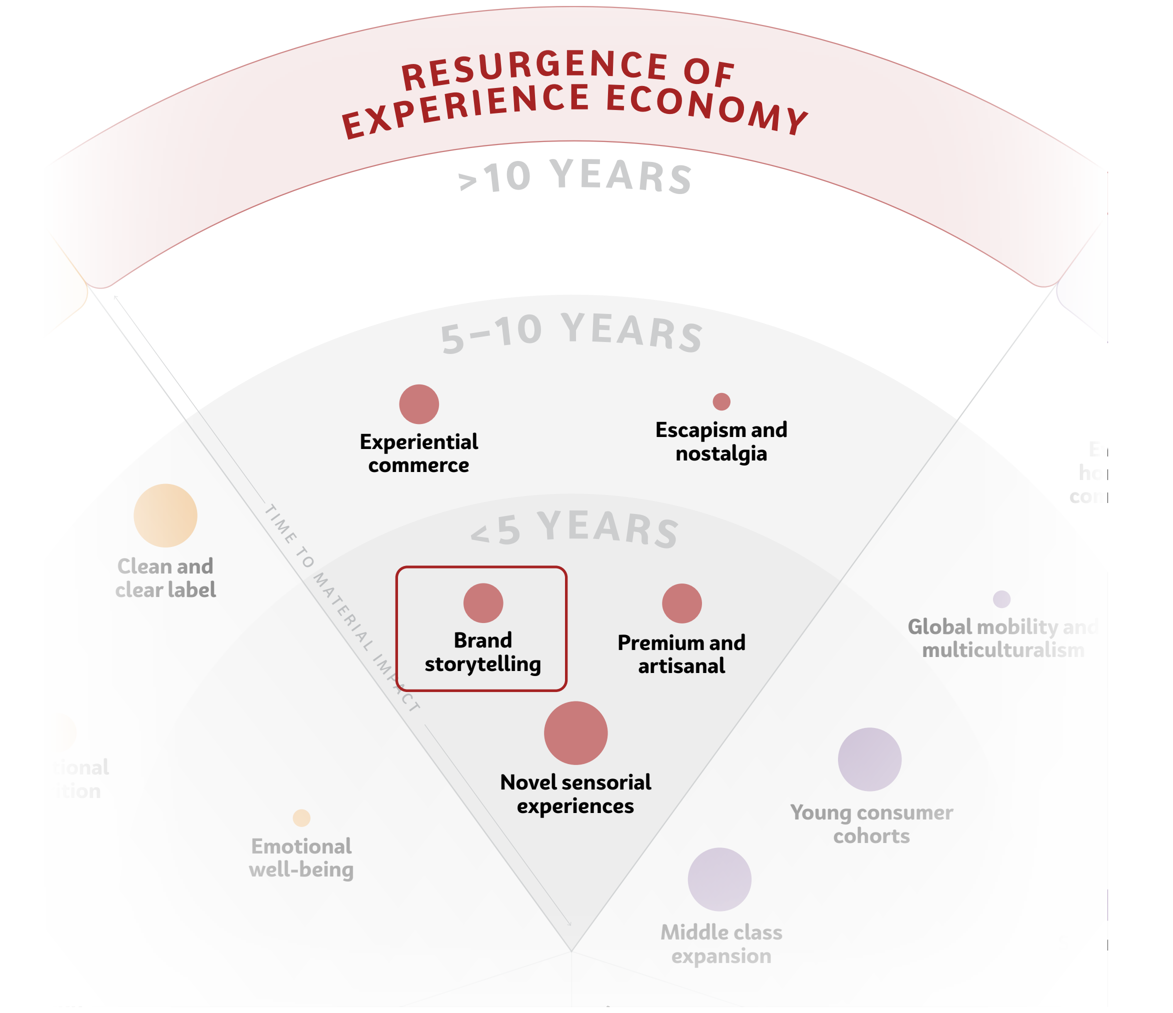
The increasing consumer focus on health and wellness also plays a crucial role as products with clean and clear labels and nutrition and health claims are often premium priced. Planet health is another key factor. With sustainability concerns on the rise, 54% of consumers say they're ready to pay more for products that are better for the environment.[146]

Preference towards experiences and social media also contribute to this trend. The aspirational lifestyles displayed by influencers often feature premium food and snacks. 24% of consumers globally consider social media an important source of ideas and advice.[147] Therefore, such lifestyle demonstrations inspire them to selectively indulge in premium food products as a more accessible form of luxury. Additionally, changing social dynamics, characterized by smaller family sizes and the desire for more intimate celebrations, have increased the preference toward more premium gifts: about 56% of consumers are likely to buy premium artisanal snacks for special occasions.[148]

GLIMPSE INTO THE FUTURE

As these factors grow in significance in the future, they will continue driving the expansion of the premium and artisanal segment within food and snacking. Personalized nutrition has the potential to further boost the growth of premium food and snacking, catering to the needs of health-conscious consumers.

BRAND STORYTELLING



IMPACT

Moderate | **Strong** | Very Strong

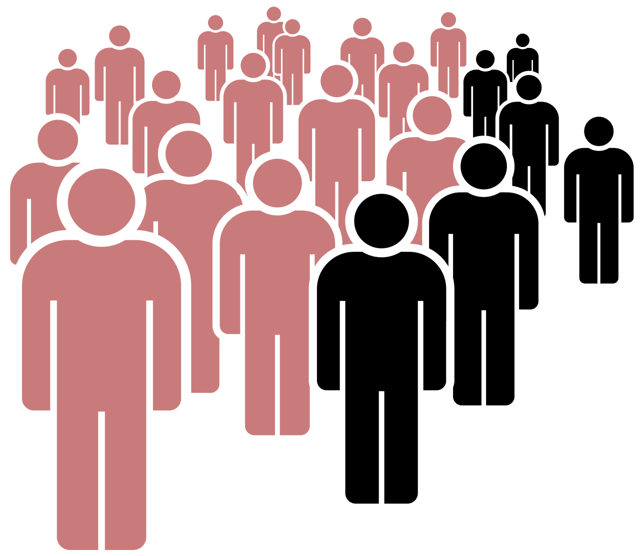
TIME TO MATERIAL IMPACT

<5 Years | 5–10 Years | >10 Years

TREND REACH

72%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023



NEXTATLAS

The digital era has elevated the importance of brand storytelling and enhanced it by making it more experiential and engaging. Future technologies will make it even more interactive, immersive, and personalized, keeping people in the center of the narrative.

Storytelling is one of the oldest forms of interpersonal communication and has been an essential element of human culture that predates written language. For millennia, stories were told to share information, inspire action, educate, and entertain.

In the era of mass media, brand communication was focused on building awareness and promoting product features and benefits. Even before the information era, direct advertising started losing its effectiveness as consumers were overloaded by the sheer number of messages they were exposed to every day, prompting fatigue.[151]

Storytelling has re-emerged as the powerful way to turn communication into experience by making it more meaningful and engaging for consumers.

Modern consumers seek to hear a brand's purpose. About 43% of consumers globally make the effort to buy products from companies that support causes they care about. [152] Other critical features are authenticity, trust, and transparency; 58% of global consumers consider them important.[153] Personalized narratives help align brand messages with consumer interests and values, and stories

> *With the exponential growth in everyday stimuli, truly memorable interactions engage consumers on multiple levels. Storytelling delivered through multi-sensory and immersive experiences surges in popularity with +168%[155] and +40%[156] YoY growth in social media conversations. Interestingly, despite proliferation of short format content, there has been an increase in interest towards longer content in 2023 (+47% YoY),[157] suggesting the turn towards deeper more meaningful engagements.*
>
> – NEXTATLAS

43%

About 43% of consumers globally make the effort to buy products from companies that support causes they care about[152]

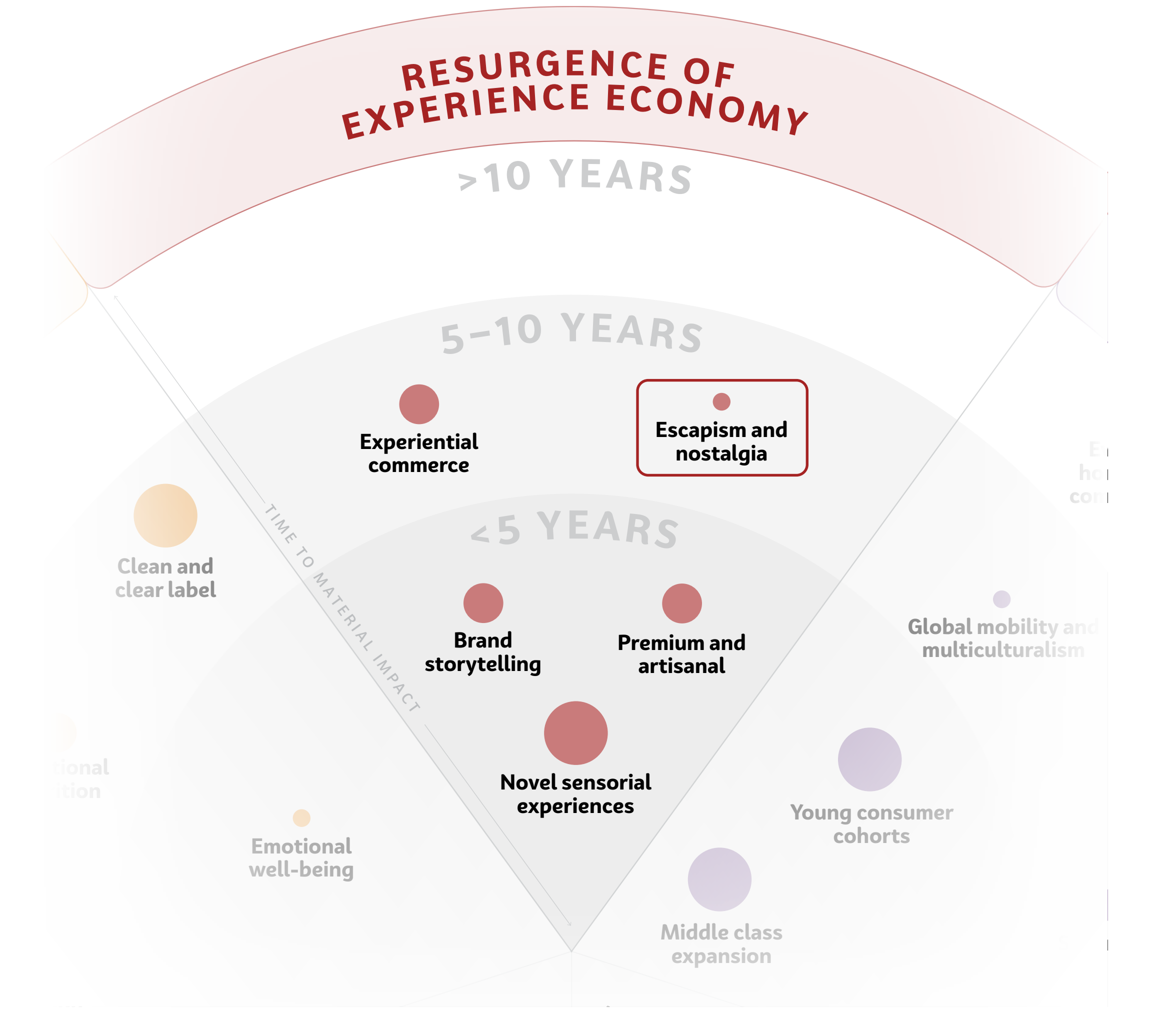
that evoke emotions, – be they nostalgia, joy, or inspiration, – forge stronger connections.

Digital media has significantly expanded the ways a story can be told by bringing in interactive and immersive experiences to better engage consumers in a brand's narrative. A variety of digital platforms help disseminate stories effectively by using various media, such as video clips, audio stories, pictures, and interactive, game-like elements. Despite this impressive digital toolbox, the human element stays central to storytelling – evidenced by the fact that roughly half of all consumers globally pay attention to, and seek ideas and advice from, influencers on social media, turning influencer marketing into 21-billion-dollar industry.[154]

GLIMPSE INTO THE FUTURE

Technological advancements will further enhance brand storytelling by making it even more experiential, interactive, immersive, and personalized for consumers. It will be brought to life by virtual and augmented realities and deeply personalized by the ubiquitous use of advanced AI algorithms, enhancing engagement. Yet, authentic, purpose-driven stories that resonate with social and environmental causes as the focus will remain essential to future consumers.

ESCAPISM AND NOSTALGIA



IMPACT

Moderate | Strong | Very Strong

TIME TO MATERIAL IMPACT

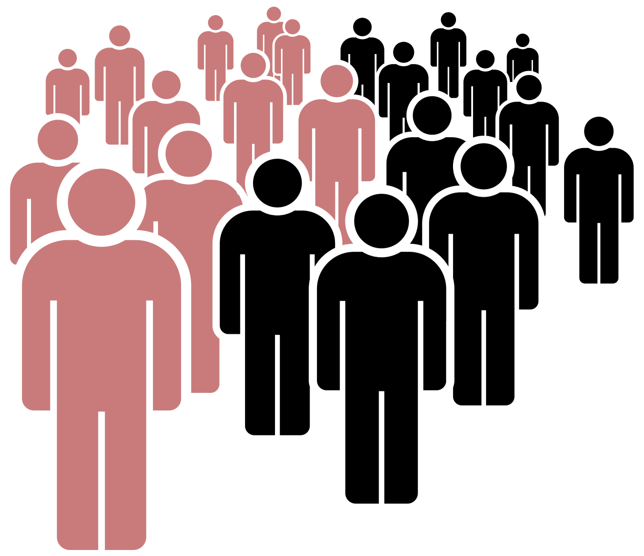
<5 Years | **5–10 Years** | >10 Years

TREND REACH

48%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023

NEXTATLAS



Escapism and nostalgia offer a retreat from the fast-paced and complex modern world. With volatility and uncertainty intensifying, the demand for these comforting experiences is almost certain to grow.

Escapism, a growing phenomenon in consumer behavior, is a desire to escape from the complexities of modern life by engaging in experiences that provide emotional and psychological relief. Nostalgia is one of the most popular escapism manifestations, offering consumers a comforting retreat into their fondly remembered past. It evokes strong emotions and memories, bringing a sense of comfort and security in an increasingly frantic, complex, and uncertain world.

Nostalgia-based products and communication deeply resonate with older generations, allowing them to revisit their cherished past that is often perceived as simpler times. Almost 50% of U.S. consumers aged 65 years and up say they are likely to buy something that makes them feel nostalgic.[158] Food is a powerful medium for nostalgia, considering that 68% of consumers globally often seek out snacks that remind them of their childhood or past experiences.[159]

Perhaps counterintuitively, younger generations are even more prone to nostalgic feelings; 75% of younger consumers[160] agreed with this statement versus 62% of mature consumers. At the same time, they are also excited by innovation and novelty. In response, the concept of "newstalgia" has emerged in recent years, describing the products and services that blend the old and familiar with the new to create unique and engaging experiences inspired by the past.

> *Food is a perfect vehicle for escape moments with 'nostalgic flavors' and 'food memories' trending (+71%[161] and +41%[162] respectively YoY). It is a part of a powerful nostalgic wave that has engulfed virtually all aspects of consumer lives, including traditionally forward-looking and novelty-centered realms like consumer technology, and with retro gaming, pixel art and early days of internet becoming hot discussion topics.*
>
> – NEXTATLAS

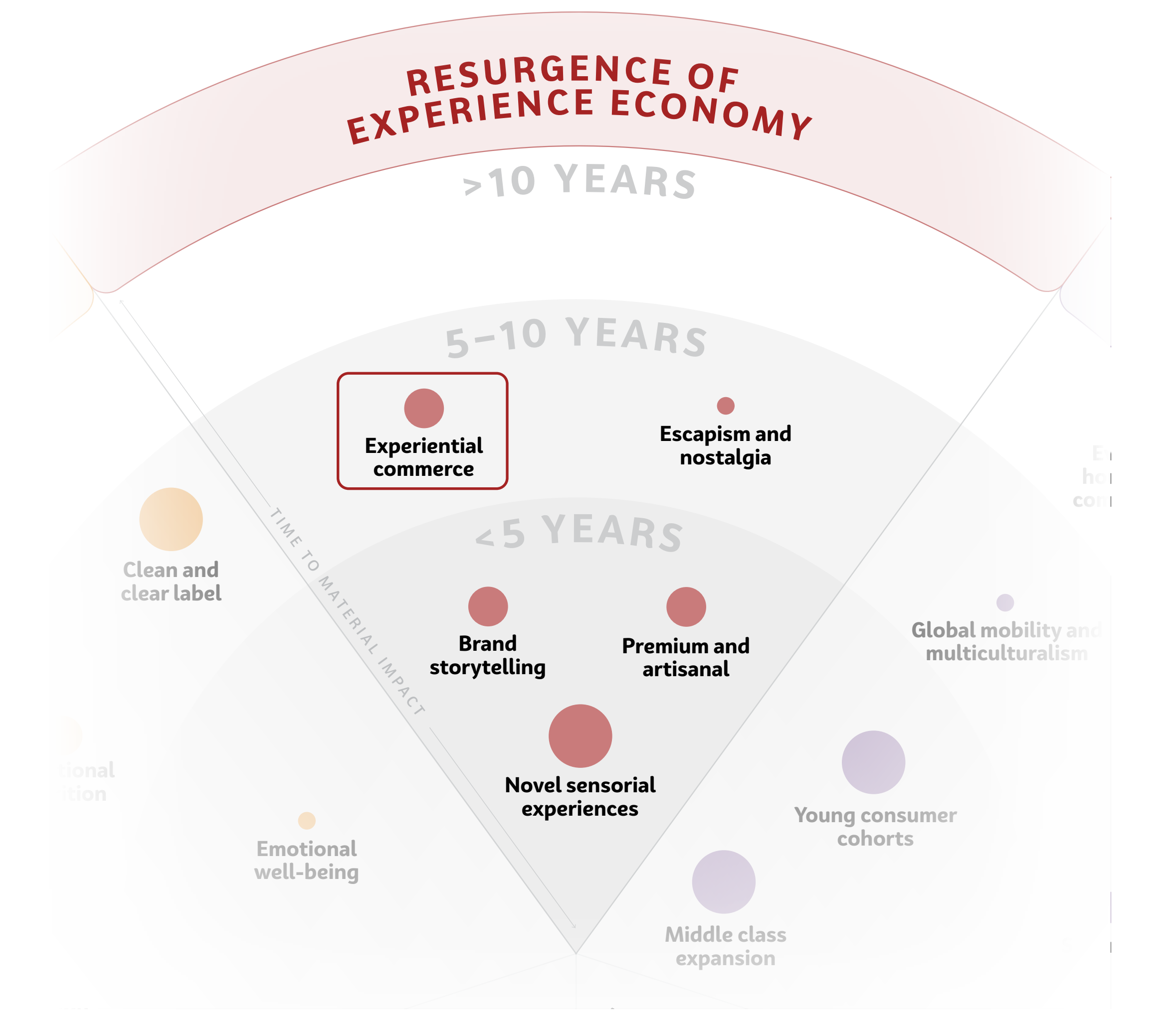
68% *of consumers globally often seek out snacks that remind them of their childhood or past experiences*[159]

Nostalgia has inspired a surge of interest towards retro tech – from vinyl records to 8-bit video game consoles and "dumb" phones. Movies based on franchises popular in the past, such as Top Gun: Maverick and Super Mario Bros. became smash hits in recent years. Similarly, heritage food and snacking brands and classic recipes also made a successful comeback, often relaunched with a modern twist, evoking a sense of nostalgia and comfort while also appealing to a sense of modernity and innovation.

GLIMPSE INTO THE FUTURE

With an increasingly volatile, uncertain, and complex environment, and with younger generations feeling more nostalgic on average, escapism and nostalgia are positioned to continue gaining popularity among consumers who long for simpler times. In the future there will be more heritage brands and franchises making successful comebacks on a permanent basis, or as limited editions.

EXPERIENTIAL COMMERCE



IMPACT

Moderate · **Strong** · Very Strong

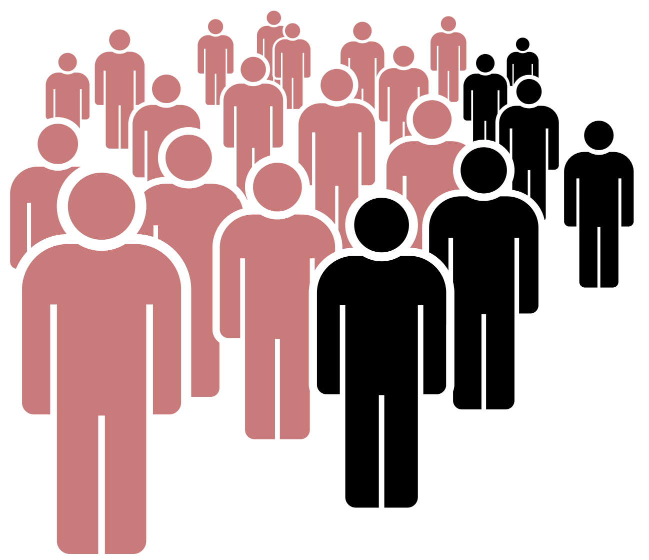
TIME TO MATERIAL IMPACT

<5 Years · **5–10 Years** · >10 Years

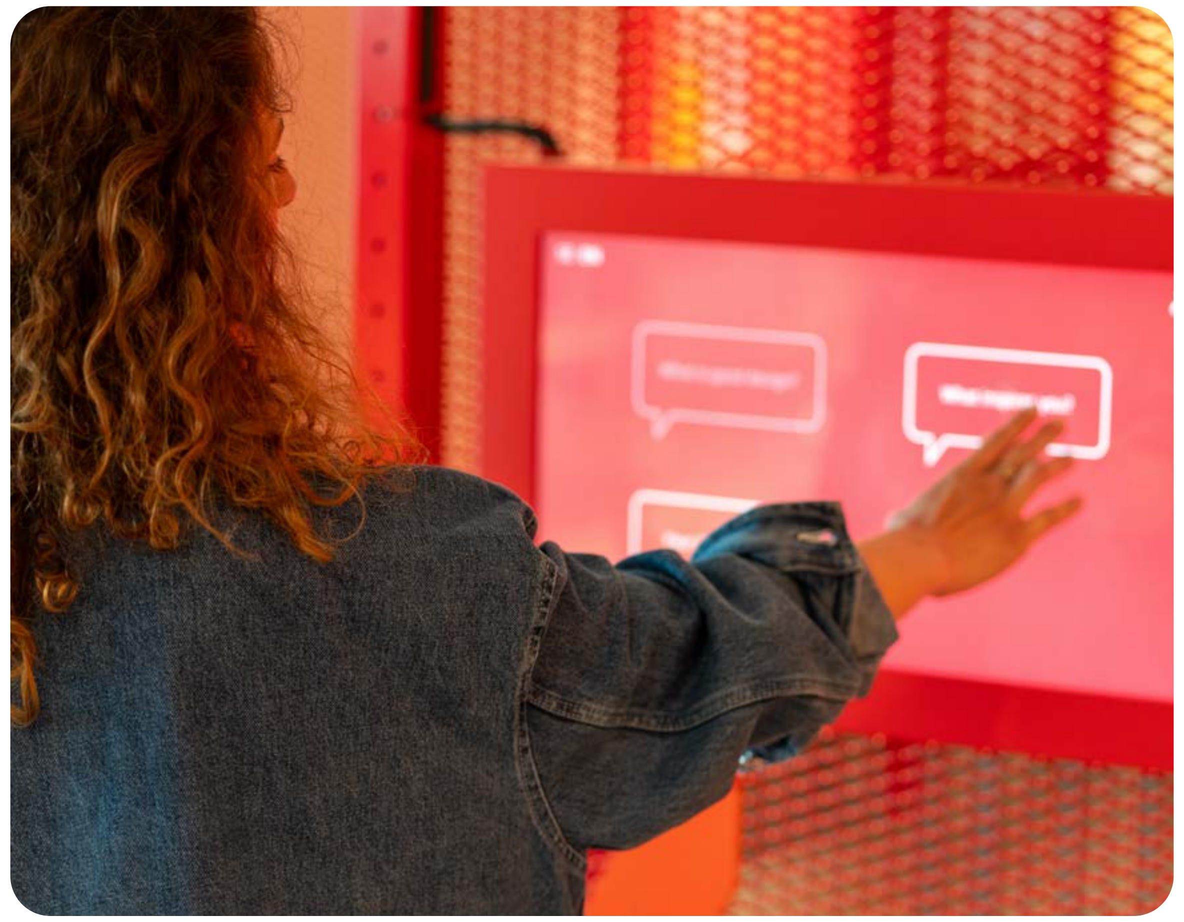
TREND REACH

73%

of monitored early adopters worldwide have shared information related to this trend in their social media posts at least once in 2023



NEXTATLAS



Experiential commerce aims to elevate shoppers' journey through engaging, immersive, and interactive experiences that span across retail channels and platforms. Further advancements in digital technologies will significantly expand the repertoire of experiential retail elements, offering an even more engaging shopping journey.

Experiential retail can be traced back to the 20th century, when retailers began adding extra features beyond basic shopping to attract customers, such as fashion shows, product demonstrations and samplings, play areas and integrated dining options. IKEA's showroom concept is an early example of experiential commerce success. It was innovative at the time of launch and quickly became popular with consumers.

Experiential commerce drastically grew in popularity during the digital era.[163] Emerging ecommerce brought new ways to deliver experiences for online shoppers, while brick and mortar stores embraced experiential elements to compete for customers with internet-based platforms, often enabled by the same technology. Today, experiential commerce is thriving across all types of retail channels driven by strong consumer demand: 81% of consumers globally are willing to pay more for shopping experiences.[164]

Examples of online experiential commerce features include AR (augmented reality) shopping, shoppable videos, livestream shopping, personalized product recommendations, AI-powered shopping assistants, gamified shopping, enhanced and user-generated content, and virtual pop-up stores. For physical stores, experiential retail can take the form of in-store events and workshops, product demonstrations and samplings, pop-up stores and thematic displays, dining options and lounge areas. Food and snacking products have been in the center of experiential retail since its inception through in-store and pop-up shops and dining areas, product samplings, cooking demonstrations, and themed food festivals.

> “”
>
> *Retailers and brands are finding new ways to combine the benefits of both physical and digital shopping to elevate the overall consumer experience. The resulting shopper journey is often deeper and more engaging than a purely virtual or physical one alone. With 64% of global consumers reporting they are always looking for new experiences and sensations to liven up their everyday activities,[167] these types of blended experiences are likely to proliferate.*
>
> – KANTAR MONITOR

81% *of consumers globally are willing to pay more for shopping experiences*[164]

Technological innovations that significantly contributed to the growth of experiential commerce continue to shape it. They engage shoppers in innovative ways, often combining immersive interactive elements with personalization, which is becoming a baseline expectation as 71% of consumers expect companies to deliver personalized interactions and 76% get frustrated when it doesn't happen.[165] For example, both in-store and online shopping might be enhanced by VR (virtual reality) and AR technologies, allowing customers to try products before they buy. Amazon has been experimenting with AR since 2017, and since then has launched several AR tools such as "virtual try-on" for shoes".[166]

GLIMPSE INTO THE FUTURE

In the future immersive technology integrations such as AR menus and VR food explorations could become widespread. Retail stores could also eventually feature multisensory environments with 3D interactive displays to allow customers to experience the story behind their food such as origin and sustainability profiles, in an immersive and engaging manner.

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[i] **STATE OF SNACKING METHODOLOGY:** This survey was conducted online by The Harris Poll on behalf of Mondelēz from October 11-November 10, 2023, among 3,683 global adults ages 18 and older. The research spanned 12 markets, including: The United States (n=286), Canada (n=287), Mexico (n=329), Brazil (n=281), France (n=288), Germany (n=294), The United Kingdom (n=280), China (n=280), India (n=516), Indonesia (n=281), Australia (n=286), and New Zealand (n=275). Other key groups analyzed include: Gen Z / Centennials ages 18-25 (n=672), Millennials ages 26-41 (n=1,323), Gen Xers ages 42-57 (n=892), Boomers ages 58-76 (n=734), and the Silent Generation ages 77+ (n=61). Data from 2022, 2021, 2020, and 2019 references similar studies conducted from September 18-October 17, 2022, among 3,530 global adult respondents, October 5-22, 2021, among 3,055 global adults, October 6-20, 2020, among 6,292 global adults and from September 16-24, 2019, among 6,068 global adults. Data are weighted where necessary to bring them in line with their actual proportions in the population. A global post-weight was applied to ensure equal weight of each country in the global total. This online survey is not based on a probability sample and therefore no estimate of theoretical sampling error can be calculated.

KANTAR GLOBAL MONITOR METHODOLOGY: The 2023 Kantar Global MONITOR survey collected data from over 36,000 consumers, aged 13 and above, in 28 countries across the world. The data were collected between January 3rd and February 27th, 2023. Countries covered: U.S. (n=1,700), Canada (n=1,150), U.K. (n=1,500), France (n=1,150), Germany (n=1,500), Italy (n=1,150), Spain (n=1,150), Poland (n=1,150), Sweden (n=1,500), Turkey (n=1,150), China (n=2,500), India (n=1,700), Indonesia (n=1,500), Japan (n=1,500), Malaysia (n=1,150), Philippines (n=1,150), South Korea (n=1,150), Taiwan (n=1,150), Thailand (n=1,150), Vietnam (n=1,150), Egypt (n=1,150), Nigeria (n=1,000), South Africa (n=1,150), Australia (n=1,150), Mexico (n=1,150), Brazil (n=1,500), Argentina (n=1,150), Colombia (n=1,150). All countries were weighted by age within gender targets from census counts. Region was used for all countries except China, Nigeria, and India, and originated from fielding partners. India and China were weighted on city tier. Household income or social class was used to weight all countries. Targets for income and social class originated with panel providers and secondary sources. Countries were weighted on methodology where a multimethodology survey was conducted. https://gateway.thefuturescompany.com/subscription/Global_MONITOR/Data/2023/Kantar-GM-Data-Technical_Appendix-2023.pdf

NEXTATLAS METHODOLOGY: Nextatlas data are the result of the analysis of millions of social-media posts between January 2021 and January 2024 collected from 369,430 users, aged 16 and above, detected as innovators or early adopters and active on social media in the above time frame.
Posts from the community were tracked on Instagram, YouTube, Reddit, X (formerly Twitter), and Tumblr.
The data were collected from users located, mainly, in 34 markets, ordered by weight in the community: United States, United Kingdom, France, Italy, Germany, Canada, Brazil, Indonesia, Turkey, Korea, Republic of, Spain, Australia, Argentina, Philippines, Kenya, Belgium, Ireland, India, Saudi Arabia, Egypt, Netherlands, Mexico, Switzerland, Russian Federation, Japan, China, South Africa, Sweden, Hong Kong, Venezuela, Bolivarian Republic of, Portugal, Denmark, Israel, United Arab Emirates. The AI driven data analysis identifies emerging and trending topics of societal interest, these 649 Nextatlas trends are mapped onto the Mondelez Trend Framework, including trends in this publication.
Trend reach is the percentage of users involved in the conversations on the trend topic in a specific time frame in specific location compared to the number of users active in the same location in the same time frame. For this publication reach is calculated for each trend individually at a global level, that includes all the markets mentioned above for the full year 2023.

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