

Understand what's new and next in consumer behaviour and the impact on food and drink marketing and innovation.

2025 GLOBAL
FOOD AND
DRINK
TRENDS



MINTEL

Foreword

Looking to the future, Mintel's global food and drink experts embarked on an exploration of the paradoxes that influence consumer behaviours and attitudes toward food and drink. As consumers ourselves, many of us can concede that consumers are complex beings who often act in inconsistent ways. We are capable of committing to one intention, perhaps a desire to eat more vegetables, but we actually act in ways that clash with that healthy intention, potentially by pairing our healthy salad with french fries... and a dessert.

The resulting list of four 2025 Global Food and Drink Trends explores two dualities:

1. The often contradictory ways consumers traverse between health and indulgence, as explored in the opposing pair of trends 'Fundamentally Nutritious' and 'Rule Rebellion'.
2. In the bigger picture, the 'Chain Reaction' and 'Hybrid Harvests' trends explore how supply chain disruptions and innovations are impacting consumers' local or global mindsets, while also challenging consumer preferences for tradition or high-tech innovation.

As with our previous Global Food and Drink Trends, the 2025 predictions are built on the base of Mintel's seven Trend Drivers: Wellbeing, Experiences, Surroundings, Rights, Technology, Identity and Value. The trend predictions are further supported by Mintel's extensive libraries of global consumer data, new product innovations and inspiring marketing campaigns. They're also developed around buzz-worthy topics that have the potential to upset the status quo in the food and drink industry in 2025 and thereafter, such as GLP-1 weight-loss drugs and artificial intelligence (AI).

Mintel's global food and drink analysts will continue to monitor these trends in the months and years to come. We welcome the opportunity to connect with you to share how the predictions are taking shape in a particular geography, how they are evolving with current events, or how your brand can put them into action. If you're a Mintel client, contact your Account Manager or Client Success Manager for more information. If you're not a Mintel client, nothing would make us happier than to answer your questions, so please **get in touch**.

The trends were developed around buzz-worthy topics that have the potential to upset the status quo in the food and drink industry in 2025.

Collective Genius Behind Mintel 2025 Global Food and Drink Trends



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MINTEL

WHERE GREAT MARKETING BEGINS

You ask the questions. We connect the dots, predict the future and reveal your growth opportunities.



With over 50 years of experience, we have developed a deep understanding of consumers, innovation and markets.

Let us tell you something you didn't know.



01



FUNDAMENTALLY NUTRITIOUS

The emergence of weight-loss medications like Ozempic will redefine consumer perceptions of 'food as medicine' from added functional ingredients to meeting daily essential nutrient needs.



2015

It's Not a Diet, It's a Lifestyle

Consumers began to shift away from restrictive diets in 2015 in favour of defining their own individual and adaptable approaches to health. Mintel advised brands to appeal to flexible eaters with high protein options, free-from claims and portion-controlled indulgences.

2016

From the Inside-Out

A holistic approach to health emerged in 2016 as more consumers recognised how their diet influenced how they look and feel. Mintel advised companies to spotlight beneficial wellness ingredients ranging from collagen to probiotics.

2023

Savvy Sustenance

The intersection between health and value became pivotal in 2023 when cost-conscious shoppers needed to get the most out of their budgets. Mintel recommended brands emphasise the value of nutrition with claims about satiety and basic nutrients such as protein and vitamins.

2024

Trust the Process

As scrutiny grew about the healthfulness of ultra-processed food (UPF) in 2024, consumers demanded to know more about the role of ingredients and manufacturing. To reassure consumers, Mintel recommended that food and drink companies adopt clear communication.

Evolution of the Trend

What's Happening Now

NEXT 12 MONTHS

The emergence of GLP-1 weight-loss medications, such as Ozempic and Zepbound, will inspire consumers to reevaluate the relationship between food and medicine. Despite the current limited availability of weight-loss drugs globally, consumers in many markets are aware of the drugs due to news reports, rumoured use among celebrities and social media discussions about the drugs and their multiple reported health benefits.

The drugs bring a new factor of actual medicines into the conversation about 'food as medicine.' Previously, consumers seeking 'food as medicine' turned to functional food and drink made with ingredients that run the gamut from antioxidants to zinc. Going forward, the focus will be on food and drinks that help consumers, especially weight-loss drug users who have reduced appetites, get the best nutrition from what they eat with easy-to-understand claims about protein, fibre and vitamin content.

The importance of getting the basic nutrition needed each day will be a widespread lesson that will exceed the reach and use of weight-loss drugs. Starting in 2025, brands must streamline their health claims to the critical nutrients they contain. Simplified claims that highlight protein, fibre, vitamins and mineral content will appeal to people who are using weight-loss drugs as well as the majority of consumers who define their diets based on their individual needs and how food makes them feel.

Promoting well-known essential nutrients will also help to differentiate products in an age of nearly infinite access to information—and misinformation. Brands that remind shoppers of inherent health benefits will also offer clarity to busy, cost-conscious shoppers who might already question the value of functional formulations with claims that are not as obviously felt as functional energy, digestive or high satiety claims.

Easy-to-understand information about the fundamental nutritional benefits of products will appeal to consumers

83%

of Brazilian consumers prefer foods that make them feel full for longer.

64%

of Chinese adults learn healthcare knowledge from free information on social media, video or knowledge platforms.

33%

of Thai consumers agree it's worth spending on healthy foods that provide a good amount of daily nutritional needs, such as vitamins and fibre.

23%

of Argentine consumers do not have room in their budget to try products with new or unfamiliar ingredients.

Source: Mintel Reports Brazil, *Healthy Eating Trends*, 2023; Mintel Reports China, *Trends in Health & Wellness*, 2024; Mintel Thai Consumer, *Attitudes towards Healthy Eating*, 2024; Mintel Global Consumer, *Food and Drink*, March 2024

What's Happening Next

18 MONTHS-3 YEARS

Markets will see more nutrient-dense product innovations for people using their diets to improve their short- and long-term health.

Food and drink brands will have opportunities in the coming years to complement fibre and protein claims with stats on former diet villains but key macronutrients: fat and carbohydrates. More complete macronutrient claims will appeal to health-conscious consumers, weight-loss drug users and former weight-loss drug users who are in need of convenient options to help them maintain any health improvements they gained while on the drugs.

Easy-to-understand information about the fundamental nutritional benefits of products will also appeal to consumers who are fine-tuning their personalised approaches to health. Mintel's 2030 Global Food and Drink Trend 'Smart Diets' predicted more consumers will adopt smart technology and wearable devices to better understand their unique health archetypes.

This will find data-collecting consumers in the next five years looking for trustworthy education and recommendations for products that give them the ideal nutrient balance they need based on their age and health status.

Increased adoption of personal data collection will happen at the same time as consumers pay more attention to two metrics that are key to how GLP-1 weight-loss drugs work in the body: blood sugar and hormone health. Rising interest in blood sugar could increase the demand for low-glycemic formulas, as well as blood sugar monitoring beyond just diabetics. For hormone health, brands can support men and women as they navigate hormonal changes brought on by ageing. This could lead to new formulations and specialised claims that will once again shift consumers' definitions of 'food as medicine.'

The importance of getting the basic nutrition needed each day will become more important to consumers

67%

of Indonesian consumers have tried/ would be interested in trying food or drink personalised to match their needs, such as recommendations based on diet or activity data that they share.

52%

of Indian consumers agree tracking health factors, such as diet and exercise, helps keep oneself motivated.

51%

of Australian consumers agree how well you age is based mostly on the way you live, such as staying fit or proper nutrition.

48%

of US female consumers agree there is a need for better education on women's health before, during and after major life changes.

21%

of German adults actively trying to lose or maintain weight have used continuous glucose monitoring to manage their weight in the 12 months (to April 2024).

Sources: Mintel Global Consumer, Food and Drink, September 2023; Mintel Indian Consumer, Healthy Lifestyles, 2023; Mintel Global Consumer, The Holistic Consumer, March 2024; Mintel Reports US, Women's Wellness, 2024; Mintel Reports Germany, Weight Management, 2024

Brand Inspiration



Source: nestle.com

Vital Pursuit is a new Nestlé brand of ready-meals that are high in protein, a good source of fibre, have essential nutrients and are portion-controlled. The brand is targeting GLP-1 users, but Nestlé notes the products are suitable for anyone managing their weight (US).

Tropicana Hand-Picked Golden Sunrise Pineapple Juice was relaunched with new branding. The 100% juice is sourced from Costa Rica, is naturally rich in vitamin C and offers one of five-a-day fruit servings per 150ml serving (UK).



Source: Mintel GNPD



Source: Mintel GNPD

Quaker Oat Honey & Almond Flavor Granola Cereal is made with whole grains grown in Canada and added protein from milk and whey protein isolates. A 100g serving has 19g protein and 7g fibre (Canada).

Chobani Mixed Berry Mild Greek Yogurt is made with only natural ingredients, is lactose-free and has no added sugar or sweeteners. The 100g pouch is a source of calcium and contains 7g protein and 1 billion probiotics (Australia).



Source: Mintel GNPD



Brand Inspiration



Source: Mintel GNPD

Blue Zones Kitchen meals are 'crafted for longevity' with recipes inspired by 'Blue Zone' regions where the population tends to live long, healthy lives. The brand's Burrito Bowl is inspired by Nicoya, Costa Rica, and has 11g protein and 7g fibre per meal (US).



Macros Buffalo Chicken & Mac (Australia) notes on pack that a serving offers 44g protein, 29g carbs and 18g fat. Meanwhile, **Jess's Underground Kitchen Beef Rendang** (New Zealand) claims that its meal contains 33g protein, 12g carbs and 8g fats.



Source: Mintel GNPD

Good Idea Sparkling Water recommends drinking during meals to help regulate blood sugar levels to improve 'metabolism, energy levels, mood and weight management efforts' (US).



Source: goodidea.us



Supergut is a prebiotic fibre supplement brand that taps into the demand for natural, effective metabolic health solutions that provide similar satiety benefits as GLP-1 weight-loss drugs (US).

Source: supergut.com

A View Into The Future

5 YEARS AND BEYOND

Isa settles themselves into the cosy chair at their wellness advisor's office. The 24-year-old is grateful for the convenience of the location—the grocery store below their apartment—that makes these checkups a seamless part of their routine. The monthly appointments are paid for by their health provider, which has proven via research that recurring proactive checkups reduce the need for costly maintenance medications or major surgeries to treat chronic diseases as patients age.

Their coach, Manon, is ready with Isa's latest results. Isa has been so happy to have an advisor who understands how their goals shift, sometimes month to month, and is always willing to realign her focus areas to meet Isa where they are. Last month, for example, Isa learned of a cousin struggling with fertility issues.

Even though Isa is nowhere near that life stage, the idea that this could become a problem later on has made it more important to them now.

Together, Isa and Manon put together a diet and medication plan that prioritises protein, fibre, vitamins and minerals, some of which come from Isa's produce prescription and others via supplements. Next month, Manon will run the numbers again and reassess how Isa feels about their current health metrics. For now, they leave the meeting and pick up their prescribed fruits and vegetables from the kiosk before they head up to the flat to turn the ingredients into the snacks/meals they need for the week.



Questions about how macro trends centred around 'food as medicine' will impact your brand's market opportunities and innovation strategy? We have the answers.

RULE REBELLION



Embrace consumers as 'perfectly imperfect' beings who are hungry for brands that help them 'break the rules' in food and drink.

02

Evolution of the Trend

2017

Waste Not

Mintel highlighted that the stigma associated with imperfect produce would begin to fade as more products upcycle ingredients that would have otherwise gone to waste. Consumer benefits of taste and nutrition were delivered by breaking previous rules on how food 'should' be made.

2018

New Sensations

The theme of pushing the boundaries continued with Mintel predicting that food and drink texture formulation would be leveraged to provide consumers with interactive and documentation-worthy experiences that tangibly connect them to the real world.

2022

Enjoyment Everywhere

Breaking out of their confines was a key focus for consumers in 2022 after COVID-19 social distancing eased in many markets. Mintel recommended that food and drink brands facilitate mass enjoyment with products that amplify flavours, colours, aromas and interactivity.

2023

UngUILTY Pleasures

Amidst global crises, Mintel uncovered that consumers would be unwilling to compromise on moments of pleasure and indulgence. Rather than marketing certain foods and drinks as 'guilty pleasures', brands could encourage overwhelmed consumers with the freedom to indulge.



What's Happening Now

NEXT 12 MONTHS

Food and drink brands can target consumers with innovation that breaks the invisible rules around food and drink consumption.

Food and drink consumers are human and, therefore, not perfect. As society becomes more casual, more people are not only accepting but celebrating their imperfections. Food and drink brands can target these 'perfectly imperfect' consumers with innovation that breaks the invisible rules around food and drink consumption.

'Perfectly imperfect' habits are already in place. Despite intentions to eat healthily, cook meals from scratch and stick to a set grocery budget, the reality is these do not always happen. Far from feeling concerned about these choices, consumers are embracing their imperfect habits. Food and drink brands can lean into how consumers actually want to or do consume food and drink rather than how they feel they 'should'. By supporting these rebellious tendencies, brands can help rule-breaking consumers feel more represented by the outside-the-norm food and drink choices available to them.

'Perfectly imperfect' habits are already in place among many consumers

73%

of US consumers agree it's OK to be average.

64%

of Japanese consumers agree that cooking at home is too troublesome.

48%

of South Korean consumers say they only occasionally eat healthily.

34%

of German consumers eat something indulgent, such as a dessert or treat, daily.

33%

of Thai consumers say they don't feel guilty after eating or drinking unhealthy food or beverages.

Source: *Mintel Reports Japan, Home Cooking & Eating Habits, 2023*; *Mintel Reports US, Marketing to Millennials, 2024*; *Mintel Thai Consumer, Attitudes towards Healthy Eating, 2024*; *Mintel Global Consumer, Food & Drink, March 2024*; *Mintel Global Consumer, Food & Drink, September 2023*

What's Happening Next

18 MONTHS-3 YEARS

In the next few years, food and drink brands will apply this rule-breaking mentality to address consumer issues through less conventional solutions. The **global innovation slowdown**, juxtaposed with continued consumer demand for new foods and flavours will see brands collaborate with partners from inside and outside the food and drink industry to introduce greater novelty through taste, texture and aroma.

Brands also have an opportunity to appeal to times when consumers feel less than perfect. Brands will seek to break down continued social stigmas surrounding lesser-talked-about health issues. For example, less-seen on-pack and marketing messaging that directly mentions the role of food and drink in mental health management will become more commonplace.

There is also more potential for 'rule-breaking' innovation from food and drink brands that are feeling the pressure to be sustainable despite knowing that consumers won't necessarily pay more for eco credentials. Innovative brands can create new norms by developing products with unfamiliar sustainable ingredients that can be marketed on their unique taste.

Overall, brands exploring less conventional inspirations to reach the routine or the newly discovered desires of 'imperfect' consumers will need to make their core or creative 'rule-breaking' benefit(s) clear on pack.

Consumers are open to
'rule-breaking' innovation

63%

of Chinese consumers look for new foods or flavours to try most or all of the time.

58%

of UK sweet consumers agree that sweet products made in collaboration with other food and drink brands, such as soft drink brands, would appeal to them.

55%

of Indonesian consumers expect brands to take the lead in addressing environmental issues.

37%

of global food and drink launches were classified as 'new products' in 2023, compared to 50% in 2007.

Source: *Mintel Global Consumer*, Food & Drink, March 2024; *Mintel Reports UK, Sugar and Gum Confectionery*, 2024; *Mintel Global Consumer*, The Holistic Consumer, September 2023; *Mintel Global New Products Database (GNPD)*

Brand Inspiration



Source: Coffee Mate

Coffee Mate Dirty Soda Coconut Lime Creamer was launched after TikTok revealed users adding citrus as part of their 'dirty soda' creations that combine carbonated soft drinks, coffee creamer and flavours from syrups or fruit juice (US).

Ore-Ida and GoodPop launched the **Fudge n' Vanilla French Fry Pop**, a limited-edition frozen treat inspired by the popular combination of dipping French fries into a milkshake (US).



Source: goodpop.com



Source: Mintel GNPD

Duchess of Sweet is inspired by the famous (and infamous) duchesses who 'broke the rules and pushed against boundaries'. The brand encourages people to enjoy items like its Passionfruit Flavored Marshmallow Delights Milk Chocolate 'guilt-free' (Australia).

J.M. Smucker's **Uncrustables** brand, which is said to be pacing towards sales of US\$1 billion in the next two years, has gained success because kids (and many adults) prefer to cut the crusts off their sandwiches (US).

Source: J.M. Smucker Co.



Because **Sant Erwann beer** draws its inspiration from the personality of the patron saint of Bretons, a lawyer with a rebellious character, the brewery 'refuses to comply with conventions' and follows its own rules—such as using a unique recipe of seven cereals for its Blond Beer (France).

Source: brasserie-bretagne.fr



Brand Inspiration



Source: happyproducts.com



Source: Mintel GNPD

Inspiring consumers to play with their food and 'test the stretchy texture of the gummy', Japan's **UHA Mikakuto Kogummy** collaborated with a rubber band brand for **O'Band Stretchy Gummy Assortment** (Japan).

Award-winning actor Robert Downey Jr. co-founded a coffee brand, **Happy**, that focuses on transparent sourcing and connects drinkers with mental health resources via an on-pack QR code linking to the National Alliance on Mental Illness (US).

Mille A Supergrain Co. Magic Masala Jowar Puffs are made with millets, which are said to need far less water than rice or wheat and can be grown without chemical pesticides and fertilisers. The brand breaks conventions in sustainable product communication by describing millets as 'yummy' and 'easy to love' (India).



Source: Mintel GNPD

Sleep Well Hot Chocolate Drink is a blend of cocoa and valerian to help promote and maintain natural sleep—helping consumers correct an imperfect behaviour. The brand details that 'sleeping well boosts mental health' (UK).



Source: Mintel GNPD



A View Into The Future

5 YEARS AND BEYOND

Luna's alarm clock gives a tinny ring, and she swipes it off her bedside table. She grunts and picks it up. The second-hand retro alarm clock now has another crack on the clock face. With a sleepy smile, she snaps a photo of it and posts it with the enduring social media 'under-consumption core' tag.

Bustling into the kitchen of her share-house, she grabs a slice of last night's (now cold) pizza and dips it into Pazz's Pizza Reviver. The dip is said to 'bring to life last night's slice with sriracha avocado chocked full of B vitamins to boost your vibe for the day ahead'.

Before lunchtime pilates, Luna swings by her local convenience store and grabs a full sugar, triple-caffeine energy drink, which she decants into her opaque reusable water bottle to release its energy-boosting aroma. Pilates pal Mark says she should cut down before telling her that he's been awake since 4:30 am to score savoury cheesecake, upcycled

spent grain biscuits and matcha-dusted vegan doughnut holes from the buzzed-about art-pop bakery truck. 'He should cut down,' she thinks to herself.

For dinner, Luna meets her old school friend, Darcy. They both order salads with sustainably grown heirloom tomatoes. Luna enjoys the sweetness they add and the fact that they look like mini pumpkins.

That night, Luna puts the finishing touches on her latest social media video about a drink concept she's been working on known as 'Luna's Libido Elixir', which contains maca and tribulus, two natural aphrodisiacs. She swears by them from her own experience after she and her partner were having some intimacy issues. Now, she's using her influencer training to break down taboos about sexual health (and hopefully gain some investors) with periodic posts about the elixir on her social media accounts.



Questions about how macro trends centred around 'perfectly imperfect' food consumers will impact your brand's market opportunities and innovation strategy? We have the answers.

03



CHAIN REACTION

As disruptions to the food supply become more frequent, the industry will need to encourage consumers to accept and trust the new origins, ingredients and flavours that will emerge locally and globally.



2016

Based on a True Story

Mintel explained how consumers are increasingly interested in learning the truth behind a product's origin, inspiration or ingredients. Brands have an opportunity to continue to tell more stories about how their products are made and what sets them apart.

2018

Full Disclosure

Consumers started to require complete and total transparency from food and drink companies in 2018. Mintel advised companies to reassure consumers and regain their trust by being forthcoming about the ingredients, production processes and supply chains used to make and distribute their food and drink products.

2021

United By Food

Food, drink and foodservice brands had the opportunity to connect with consumers who were using their diets to express facets of their identities. Mintel highlighted opportunities for brands to create communities of fans where they could mobilise in support of causes important to them.

2022

In Control

Food, drink and foodservice brands were advised to help consumers feel empowered to make confident decisions that protected their health and the planet's health. Mintel forecasted that consumers would seek clear and reliable guidance that a product would meet their health priorities, personal ingredient preferences and/or moral values.

Evolution of the Trend

What's Happening Now

NEXT 12 MONTHS

Because consumers are embroiled in geopolitical events, implicated brands must be vigilant and communicative.

More frequent climate-related production challenges and geopolitical events are increasing consumers' food bills and awareness of how distant world events can affect their meal plans. This will test the trust which people have in food and drink companies, particularly if it results in food supply chain disruptions or adjustments in how products are sourced and marketed.

To counter uncertainty, consumers seek knowledge—brands should expect their operations to be researched. Indeed, because consumers are embroiled in geopolitical events, such as the Gaza-related boycott of Western food companies in Muslim countries, implicated brands must be vigilant and communicative.

This particularly applies to political movements that embrace local food security to win votes, especially as populism intensifies in some countries. For example, Norway began stockpiling grain in June 2024 for its population in case 'the unthinkable' happens. Political promises of self-sufficiency will be checked by the realities of climate change and economics. Importantly, brands need to remember that for most food shoppers, availability is more important than local origin.

This aligns with evolving consumer sentiment that 'swings between moral values and basic needs', as noted by **Mintel's 2025 Global Consumer Trend 'The Globe: Tradition in Transition'**. In an increasingly volatile world, food and drink brands must clearly communicate how adjustments from local to global sourcing were made to benefit consumers.

Consumers are increasingly more aware of the impact of climate challenges and geopolitical events on their meal decisions

77%

of potential US voters (aged 18+) say foreign affairs, such as the conflict in Ukraine or relations with China, are important personal issues for them.

73%

of Italian adults would like to know more about how the growing conditions of coffee, such as the type of soil or climate, affect its taste.

65%

of Japanese adults agree people are powerless in the face of unpredictable, life-changing events.

64%

of Germans who have eaten or ordered world cuisines from restaurants or food outlets would like to see more world cuisine dishes with ingredients sourced in Germany at restaurants or food outlets.

Source: Mintel Reports US, *American Values*, 2024; Mintel Global Consumer, *Coffee & RTD Coffee*, Europe, 2024; *Mintel Reports Japan*, *Living in the Age of Uncertainty*, 2024; Mintel Reports Germany, *Attitudes towards World Cuisines*, 2024

What's Happening Next

18 MONTHS-3 YEARS

Looking ahead, the global food supply chain will continue to face disruptions caused by climate change, geopolitics and technology challenges, including cyber terrorism. Cross-industry, multinational collaboration and scalable tech solutions will be required, but are not without complications. More importantly, consumers will feel the consequences of these challenges personally, and brands must be ready with solutions.

Disrupted supplies of prized commodities such as cocoa, vanilla and grain will hit producers and be noticed by consumers as the personal impact will be escalated by media attention. This will compel brands to be more transparent and explain reformulations or alternative ingredients via social media and other communication channels.

At the same time, more ingredients will be sourced from alternative and potentially more reliable growing regions, such as olive oil from Algeria or Peru. Brands can highlight the benefits of diversified sourcing, such as nuanced flavour variations. For example, Ugandan vanilla is less sweet and richer than Madagascan vanilla, and English white wines are typically zestier than French white wines.

Brands will have a willing audience as many consumers' local-centric identities will be transformed by technology, social media, the arts, immigration and travel into more global sensibilities. **China's Guochao** trend was sparked by the clash between digitally-boosted global influence and national pride. It's a clash that will echo in other regions, impacting food choices. Brands can appeal to consumers' fluctuating horizons by sharing how they are global or local citizens, just like consumers.

Brands adjusting to meet the new reality will have a willing audience as many consumers' local-centric identities transform into more global sensibilities

77%

of 'newer Canadians' (those not born in Canada and have lived there for less than 10 years) often buy products or brands imported from their home country.

74%

of French adults agree the effects of climate change will impact what food and drink are available in supermarkets during their lifetime.

64%

of Spanish coffee users like seeing detailed information about who grows the coffee beans a brand uses, such as farmer profiles or pictures on websites or product packaging.

50%

of US adult Gen Zs (born 1997-2005) say patriotism is a value that's important to them, which is low compared with 68% of Millennials (born 1980-96) and 82% of Baby Boomers (born 1946-64).

Source: Mintel Reports Canada, *Marketing to Newer Canadians*, 2024; Mintel Global Consumer, *Sustainability in Food and Drink, Europe*, 2024; Mintel Reports US, *American Values*, 2024; Mintel Reports, *Coffee & RTD Coffee*, Europe, 2024

Brand Inspiration

The price of **government-subsidised bread in Egypt**—which much of the population relies on—jumped 300% to 20 piasters (US\$0.0042) from five piasters in June 2024 (Egypt).



Source: REUTERS/Mohamed Abd El Ghany

Source: Mintel GNPD



Unilever's Robertsons seasonings brand has seen supplies of spices switch from India to domestic producers, including its **Rajah Mild & Spicy Curry Powder**, as part of Unilever's wider efforts to localise sourcing in Africa (South Africa).

Coldpress Juice brand expanded beyond orange ingredients with a new mandarin juice in February 2024, citing 'soaring orange juice prices' and unpredictable weather patterns (UK).



Source: Mintel GNPD



Profits from Sweden-based **Palestine Drinks** (with distribution across Europe) go to charities working in Gaza. It has succeeded as an alternative to Coca-Cola and Pepsi and plans to launch globally (Sweden).

Source: palestinedrinks.com

Brand Inspiration

Cocoa processor **Blommer Chocolate** says its cocoa butter substitute, containing palm kernel and sunflower, is 'an economically viable alternative without compromising on quality' (US).



Source: blommer.com

Source: nestle.com



Nestle Star 4 is the company's new Arabica coffee variety, which has been developed using AI to withstand the climate change challenges that are decimating coffee yields (Global).



As Mediterranean olive-growing markets struggle with climate change, Algeria is tipped to be a bigger olive oil-growing market following a government-led planting initiative, promoting brands like **Aulisua Extra Virgin Olive Oil** (Algeria).

Source: Mintel GNPD



Molson Coors is moving the production of its licenced Italian beer brand Peroni Nastro Azzurro to the US as it wants the reliability of domestic production (US).

Source: Mircea Moira / Shutterstock.com

A View Into The Future

5 YEARS AND BEYOND



The words 'Why are we better than Madagascar?' remain unanswered on the flipchart in Charles's office in Kibale, Uganda. As the new CEO of the country's oldest vanilla farm, Charles is tired. He just fired two of the armed guards who protect the vanilla crops from thieves during this growing season because of their tardiness. They blamed the broken roads, which is probably true, but his security drone is never late.

'Why are we better than Madagascar?' he thinks. In 24 hours, he must answer this question on a video call with a Chinese-based business-to-business spice supplier. His vanilla is obviously organic and Fairtrade, but so is Madagascan, and Synbio vanilla is increasingly pitched as ethical.

An American ice cream company, which used Charles' 'damned bold-tasting' vanilla, once promised to visit to film his workers. They cancelled, though, owing to riots near the Kampala airport and made the video with AI instead. The faded 'Welcome!' party bunting still hangs in the trees.

'Why are we better than Madagascar?' Charles' father was fond of saying that Ugandan vanilla had a higher vanillin content than other grower countries. But do Westerners care? Do Ugandan? The tub of locally-made vanilla ice cream in his freezer contains artificial vanilla, is cheap and tastes fine. And so Charles decides that maybe his vanilla doesn't have to be better than Madagascan. It just needs to be cheaper.

**Questions about how macro trends centred around new origins, ingredients and flavours will impact your brand's market opportunities and innovation strategy?
We have the answers.**

HYBRID HARVESTS



Food and drink companies will need to demonstrate how technology and agriculture work together to benefit consumers, farmers and the environment.

04

Evolution of the Trend

2016

Eco is the New Reality

Mintel observed that deepening drought, food waste and other natural phenomena would shift sustainability from being good for a company's bottom line to a necessary new product development consideration for the common good.

2018

Science Fare

As some brands were looking to scientifically engineer food in response to the stretched global food supply, Mintel predicted how the appetite for these products would eventually go beyond just environmentally-minded consumers to those concerned with consistency, efficacy and purity.

2020

High-Tech Harvests

Mintel's future-looking 2030 Global Food and Drink Trend predicted consumers would become more accepting of and trusting in the essential role science and technology have in guaranteeing access to affordable, safe and nutritious food and drink in the next ten years.

2024

Climate Changes, Comfort Endures

In an ever-worsening climate crisis, Mintel discussed how eco-aware brands could not de-prioritise comfort and pleasure in favour of sustainability credentials alone.

What's Happening Now

NEXT 12 MONTHS

Food and drink brands should integrate technology within current systems and explain to consumers how nature and technology enhance each other.

A greater use of technology in food and drink production is inevitable in order to meet current food supply challenges, yet many consumers are not ready to embrace it. Technology will need to be combined with older, simpler and more traditional agriculture and food production rather than positioned as a replacement. Food and drink brands will need to integrate technology within current systems and explain to consumers how nature and technology complement—or better yet, enhance—each other.

Companies must acknowledge that many consumers are apprehensive about technology being used to create, modify and produce the food they put into their bodies. In fact, a small portion of consumers are so resistant to the use of technology when it comes to the food they eat that they are demonstrating a desire to return to a more traditional way of growing and eating food.

Food remains an incredibly emotive issue for consumers, as it links people to their culture, heritage and identity. However, brands can capitalise on the fact that consumers are open to technological advances, especially when they promise to bring convenience.

Technology will need to be integrated alongside traditional growing and production methods that are still integral as part of the wider solutions to issues such as the climate crisis and feeding a growing population. Additionally, the rapid advance of AI makes it even more imperative that food and drink brands humanise the advantages for farmers presented by new high-tech tools. Food and drink brands can position themselves as intermediaries who can educate consumers on the benefits technology brings to shoppers, those who produce food and the environment.

While there is interest in technology, many consumers are apprehensive about technology being used to create, modify and produce food

69% of Mexican consumers agree AI will make daily chores easier.

53% of Indian consumers agree that science can provide solutions to the climate crisis in 2024, up from 48% in 2022.

47% of Brazilian consumers agree technology should be able to help us live more sustainably.

46% of US consumers agree companies can do more than governments to change the world.

23% of Chinese consumers have tried or would be interested in trying food and drink that is genetically modified to withstand extreme climates, up from 19% in 2021.

Source: **Mintel Global Consumer**, The Holistic Consumer, September 2023; Global Outlook on Sustainability: A Consumer Study 2024-25; Mintel Reports Brazil, Attitudes toward Technology and the Digital World, 2023; **Mintel Global Consumer**, Food & Drink, September 2023

What's Happening Next

18 MONTHS-3 YEARS

Once companies have established themselves as trustworthy agricultural innovators and educators, food and drink brands will be more in a position to begin to integrate new technology into their products. Brands must prioritise how these advancements benefit the consumer first through better taste, greater nutrition or consistent supply—and the environment second.

It will be imperative that new technology is humanised, particularly AI. For example, German juice brand Eckes-Granini has partnered with Microsoft to integrate intelligent data into its supply chain. The marketing video announcing the partnership draws attention to how this technology makes a positive difference in their producers' lives, not just making production more efficient.

Ingredient companies and other suppliers can also share the stories of their technological breakthroughs through their customers or directly to consumers. For example, Novonosis promotes its use of 'biosolutions', or 'new beginnings based on the power of biology'. Novonosis claims there is a 'biosolution' for almost everything: 'delicious cold cuts, healthier guts, thriving crops and so much more'. Similarly, Bayer recently licensed CRISPR gene-edited greens from Pairwise to be distributed throughout the US. The plants are considered safe by the US Department of Agriculture because CRISPR gene-editing is considered to accelerate optimisations that could have been made through breeding rather than introducing foreign DNA.

Companies must first establish themselves as trustworthy agricultural innovators and educators

52%

of US vegetable buyers would eat vegetables engineered to be more nutritious.

40%

of UK consumers would like to know more about the people who produce the food and drink they buy.

28%

of Australian consumers are concerned that new energy infrastructure, such as wind turbines or solar farms, would spoil the view from their homes.

23%

of Italian consumers would be most likely to choose a food or drink product containing genetically modified ingredients over one that does not if it was clear how the product was made.

Source: Mintel Reports US, Vegetables, 2024; Mintel Global Consumer, Attitudes to genetically modified ingredients in food and drink, Europe, 2023; Mintel Global Consumer, Food & Drink, March 2022; Global Outlook on Sustainability: A Consumer Study 2024-25

Brand Inspiration



Source: Amazon.com

The season 3 premiere of UK celebrity Jeremy **Clarkson's Farm** was streamed by 5.1 million viewers in the first week. The show has also been successful in countries like China and Australia. It is a rare example of the everyday struggles that farmers in the UK face becoming mainstream knowledge (UK).

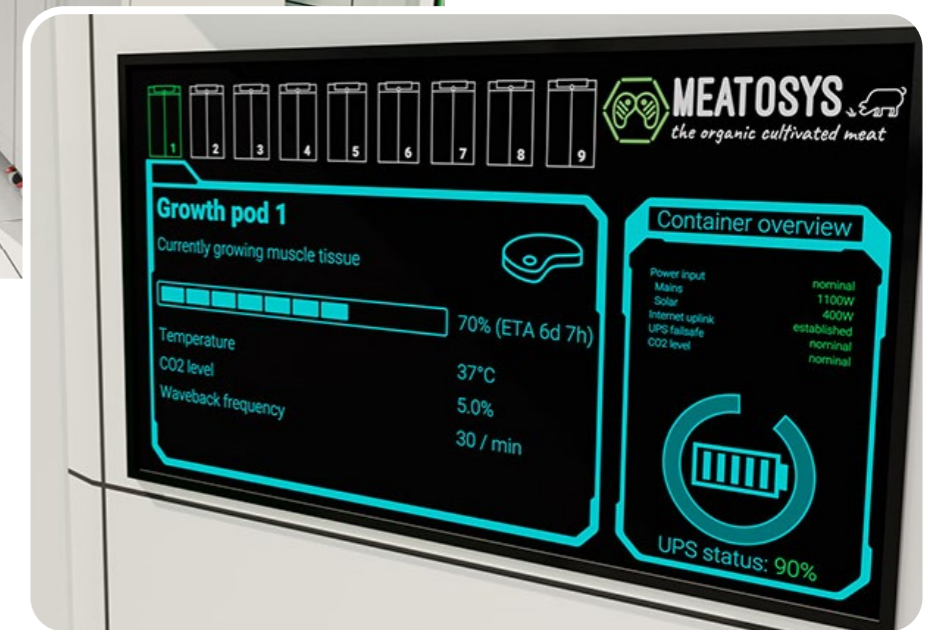
Source: Mintel GNPD



Thryve 100% Plant-Based Chicken-Like Burgers are made from faba beans and are said to be 'harvested for the next era of regenerative sustainable food' and 'healing and enriching to soil with nitrogen through its magical roots' (Saudi Arabia).



Source: meatosys.com



Start-up **Meatosys** produces small bioreactors in shipping containers, which can be installed on farms. They only cover the steps that need specialised lab equipment; the final growth and differentiation is done on the farm (Germany).

Source: Godrej Group



On National Farmers Day 2023, Indian multinational corporation **Godrej** partnered with Creativeland Asia on an ad campaign that recognised the efforts and contributions of farmers in feeding the nation (India).

Brand Inspiration

The Salk Institute Harnessing Plants Initiative aims to develop crops called Salk Ideal Plants that can store more carbon in the ground for longer thanks to increased root mass, depth and suberin content (US).



Source: salk.edu



Source: driscolls.com

Driscoll's Sweetest Batch™ Strawberry variety results from two very sweet strawberry 'parents'. The unique variety yields 40% less fruit than its legacy berry varieties, demonstrating the taste benefit to the consumer and justifying the premium proposition (US).

Better Pulse is working to 'cultivate a wholesome and sustainable plant protein' based on the black-eyed pea. Utilising vertical integration for seed design in black-eyed peas via CRISPR-Cas technology, coupled with protein extraction from the seeds, they claim the pea can 'restore food supply resiliency of plant-based protein in the face of global warming, without compromising the unique health benefits and delicious taste' (Israel).



Source: better-pulse.com



In light of growing scrutiny of meat substitutes and ultra-processed food (UPFs), an animation on the **Eat Meati** website compares the process that its mycelium-based product uses to beer and cheese making (US).



Source: meati.com

Source: foodmanufacture.co.uk



AI tech has improved the biodiversity across **Ribena's** blackcurrant farms by monitoring the birds living in its hedgerows as part of **Suntory's Farm Stewardship Scheme** (UK).

A View Into The Future

5 YEARS AND BEYOND

Kaito's sunrise alarm clock gradually starts to light up at 7:30 am, a much more civilised hour than when he first entered farming. His AI assistant has already planned out his tasks for the day based on the field data gathered at sunrise.

Having conquered software and self-driving cars, tech giant NextGen approached Kaito to be one of their founding farms in their new agricultural arm in 2026. At first, the idea of robots, AI and drones cultivating the land his family has farmed for five generations was unthinkable to him. Yet once NextGen showed him the results of their extensive farm analysis, such as the state of his soil's health, it was clear that he would need to make a change.

Tomorrow is rotation day, where Kaito's cattle will be moved to help renew the fields through natural fertilisation. Kaito sets the gate to the new field to open at the right time early tomorrow morning. Meanwhile, he programmes the drone that will drop feed to entice the cattle into the new field. He and his young team will have their hands full tomorrow planting the new trees in Rewild Wood, funded by SuperSave, the supermarket he supplies.

A few years ago, the youngest person working on the farm was 45, but Kaito now employs three people in their twenties. Rather than taking away jobs, technology has actually created them and enabled people with a wider net of skills and interests to enter farming. Kaito's son Kenzo also reversed his decision not to take over the family farm after Kaito partnered with cell-cultivated meat brand A Meating of Minds.

Remembering he agreed to cook dinner tonight, Kaito heads to the tomato patch to see if they are ripe enough. The tomatoes are still a few days off, so he heads to the vertical vivarium to get some instead. After heading home, he finally plucks up the courage to watch the presenter's speech from the award ceremony last week, where he won Solarpunk Steward of the Year.

Re-hearing the presenter's speech makes Kaito slightly emotional, thinking about all that has been achieved on his farm over the last ten years: supplying his whole village with solar energy, improving biodiversity in the area by 50%, eliminating fertiliser usage, and significantly lowering the farm's carbon footprint.



Questions about how macro trends centred around the interconnectivity of technology and agriculture will impact your brand's market opportunities and innovation strategy? We have the answers.

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Senior Manager,
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