

Modules from the BIP FOOD INNOVATION AND THE CONSUMER

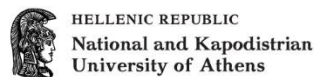
Editors: Ana Pinto de Moura
Luís Miguel Cunha
Purificación García Segovia

FOOD INNOVATION AND THE CONSUMER

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BLENDED INTENSIVE PROGRAM | ONLINE: 10 - 31 March 2025 | FACE-TO-FACE: 4 - 11 April 2025

PARTNERS:



IDEATION PROCESS FOR NEW FOOD PRODUCTS

Purificación García Segovia
Luís M. Cunha

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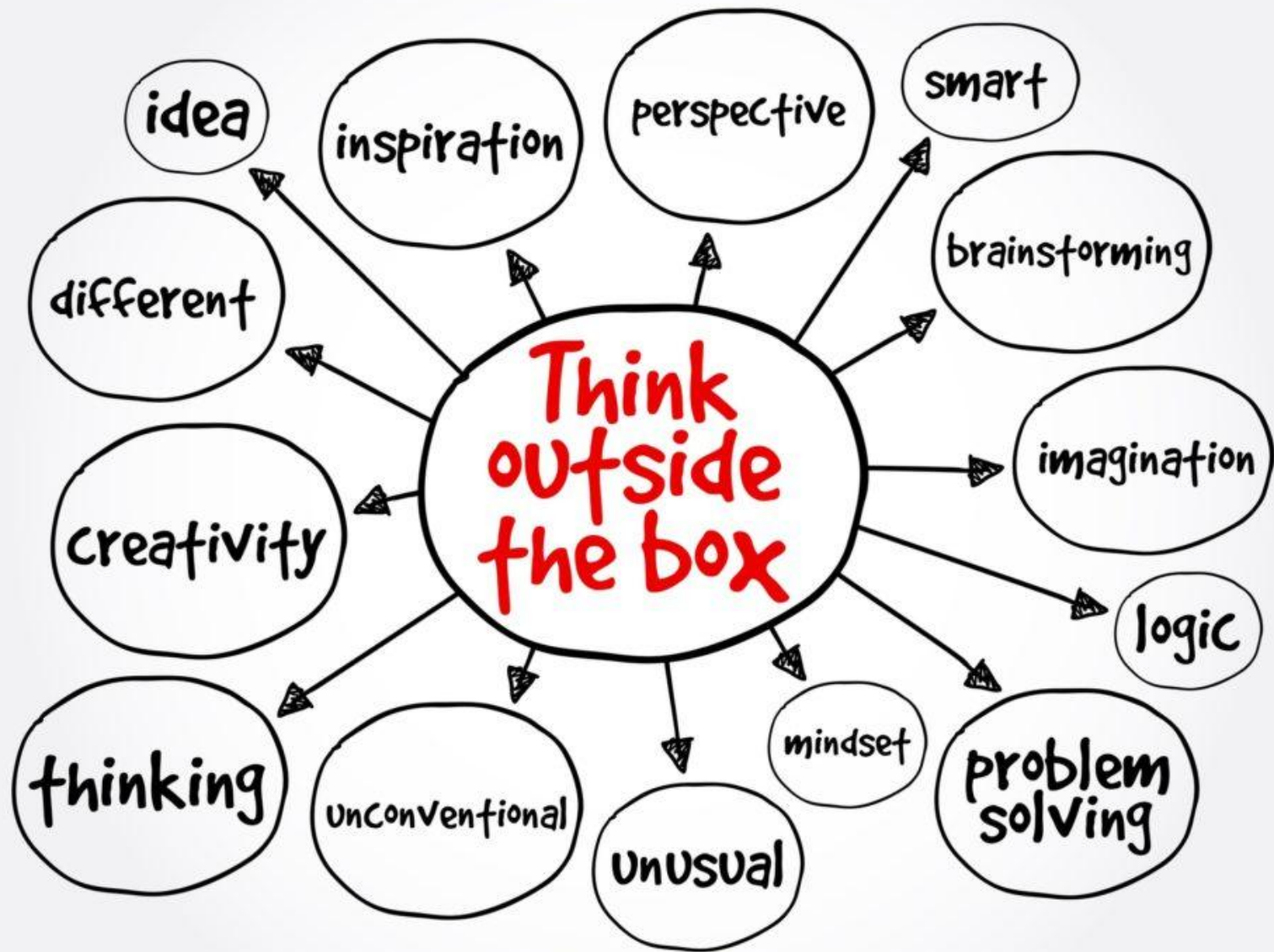
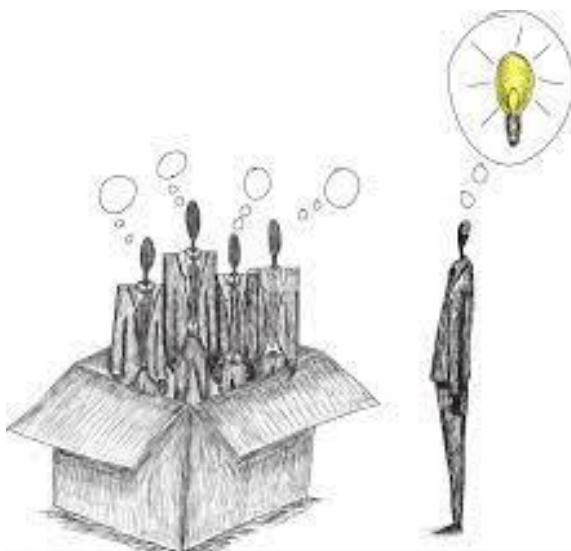
3.1. Consumer- centred food product design

FOOD INNOVATION AND THE CONSUMER

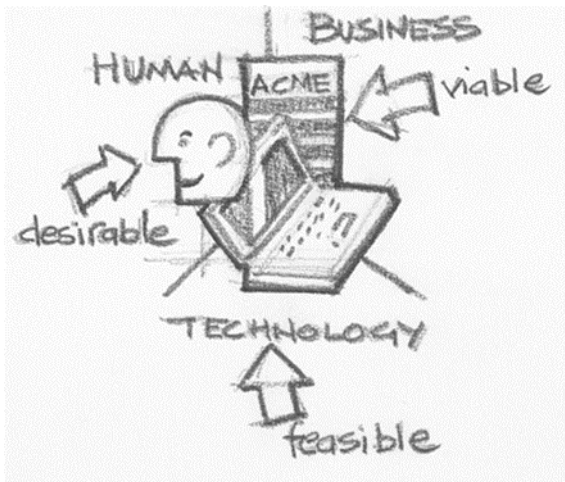
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INNOVATION IS THE ART OF THINKING OUT OF THE BOX



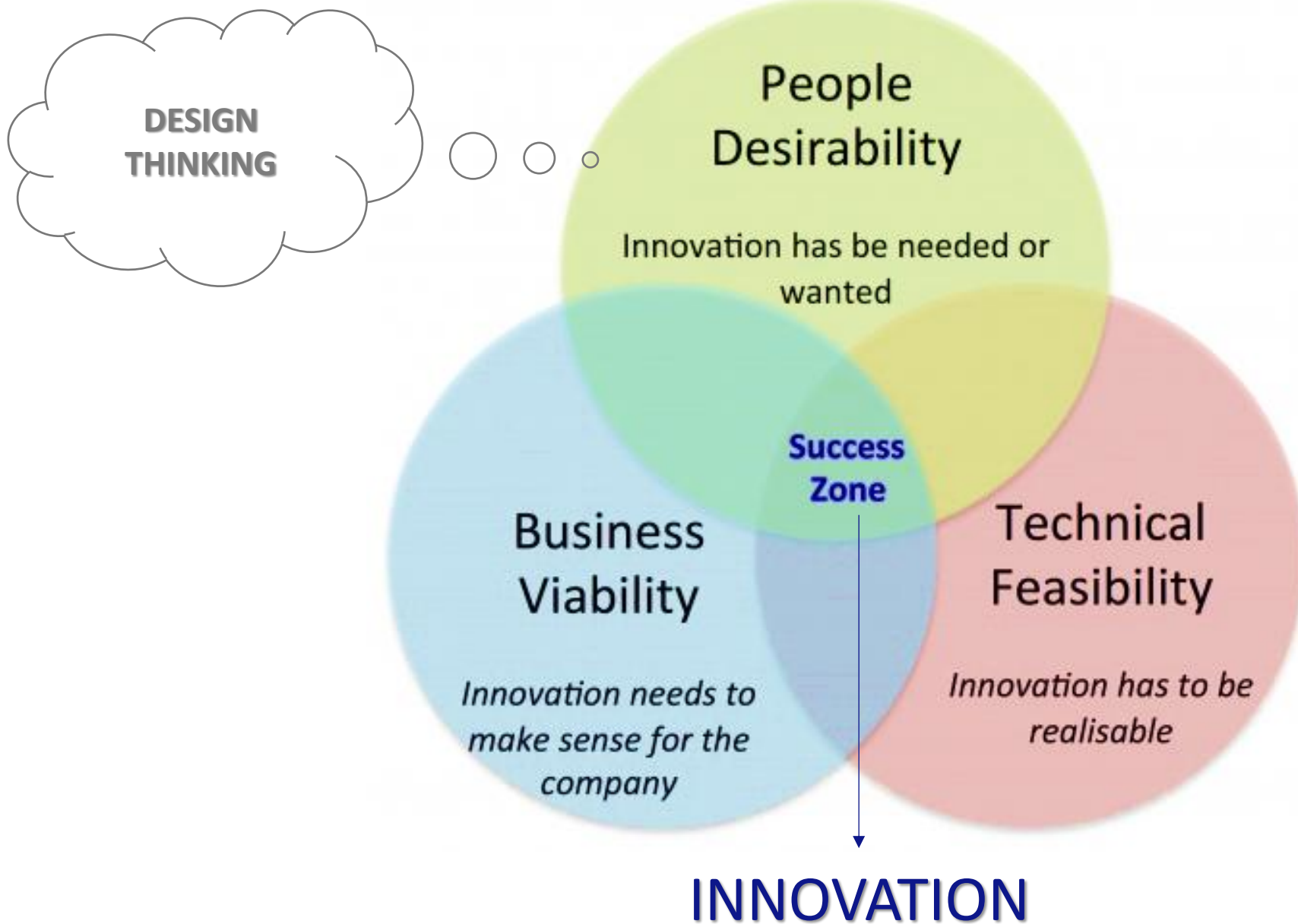
“ Design Thinking is a human centred approach to innovation that draws from the designer’s toolkit to integrate the **needs of people**, the **possibilities of technology**, and the **requirements for business success**. ”



Tim Brown



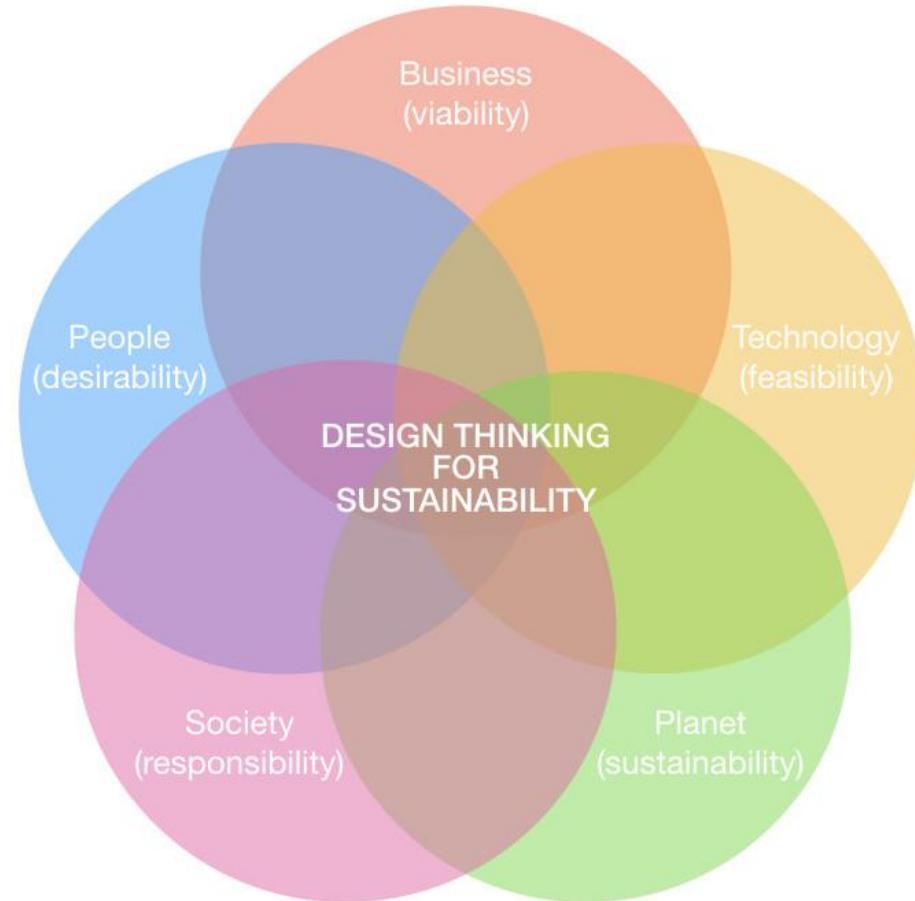
<https://designthinking.ideo.com/history>



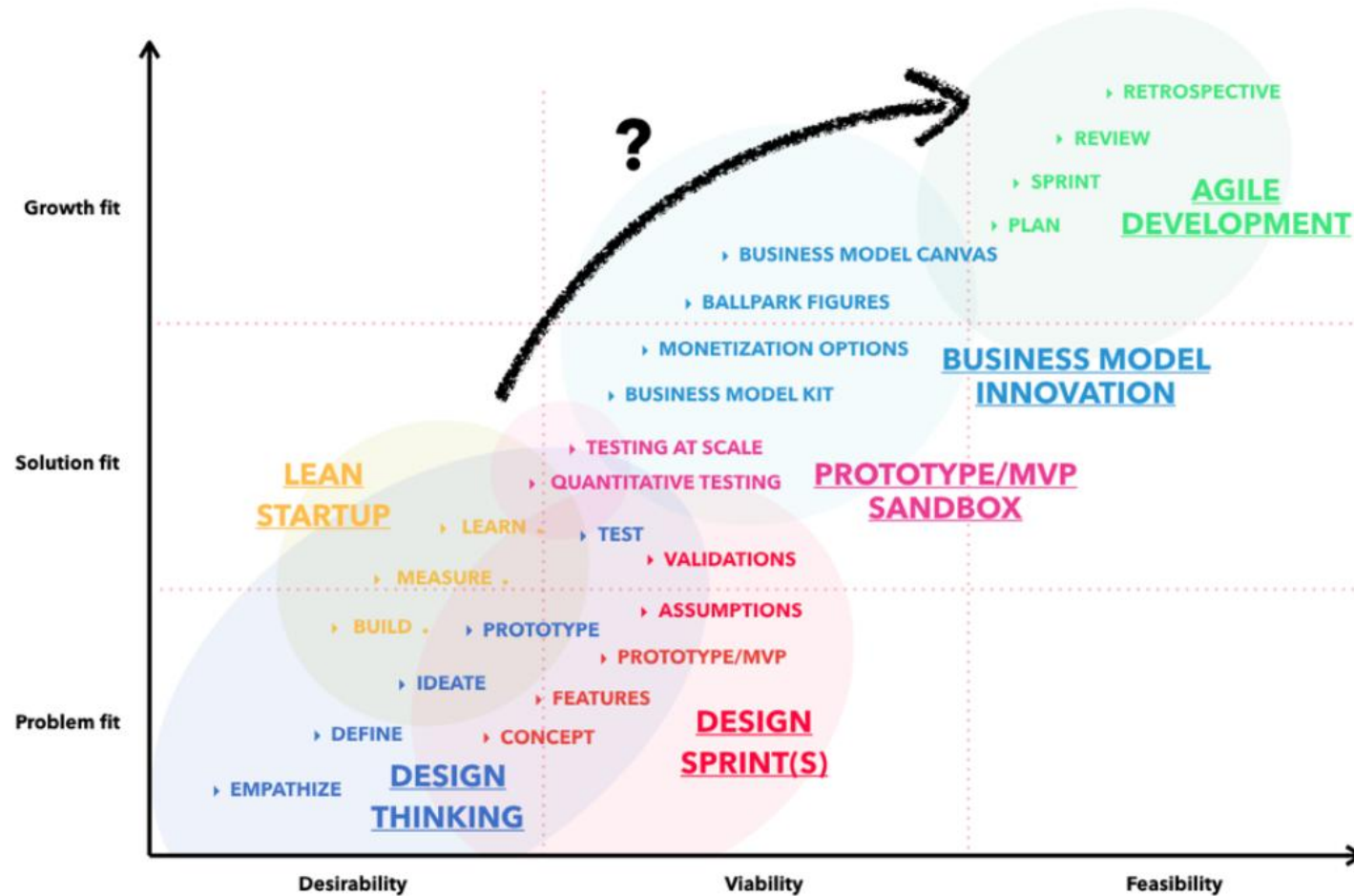
New Model of Innovation for Sustainability

Five Overlapping Circles including:

- **People:** Do consumers want/desire/need it?
- **Business:** Can we monitor it?
- **Technology:** Can we build it?
- **Society:** Is it socially responsible? i.e. not use exploitative supply chains, build communities, trade fairly, etc.
- **Planet:** Is it good for the planet? i.e. not exploit resources, use clean energy, evaluate product lifecycle, etc.

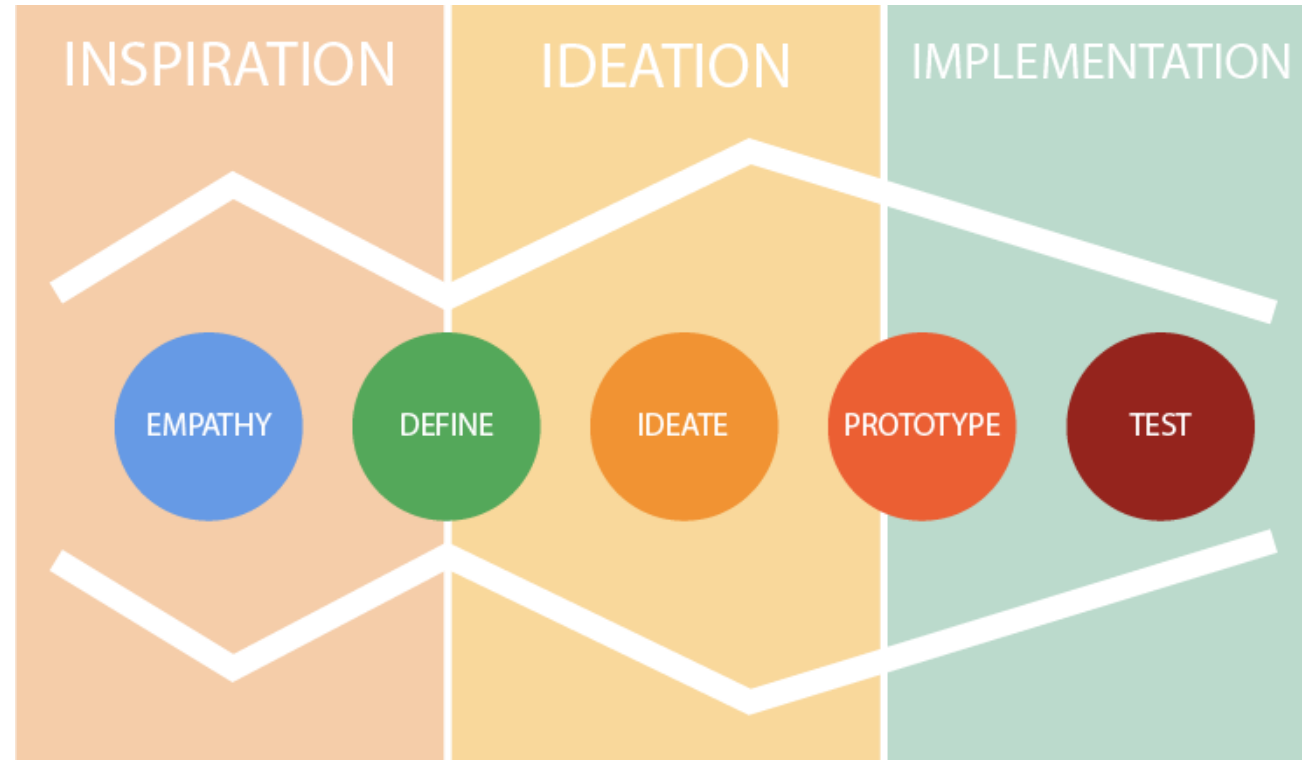


Currently, Start-ups adopt Design Thinking in the first stages of development of their great idea, to fit the problem and obtain quick feedback from the market. In next steps, they use lean manufacturing, MVP (minimum viable product) and agile as quick growing methodologies



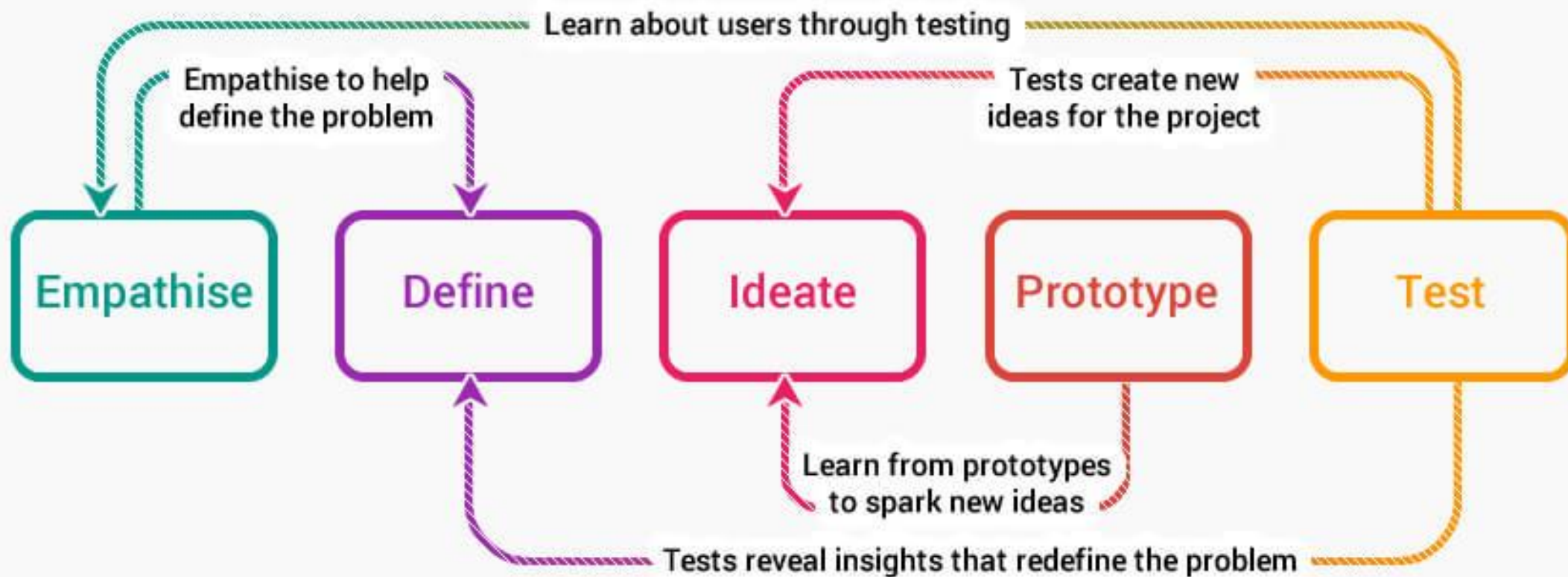
What's Design Thinking?

Design thinking is a non-linear, iterative process that teams use to **understand users/customers or in our case consumers**, challenge assumptions, redefine problems and create innovative solutions to prototype and test.



Involving five phases—**Empathize**, **Define**, **Ideate**, **Prototype**, and **Test**—it is most useful to tackle problems that are ill-defined or unknown

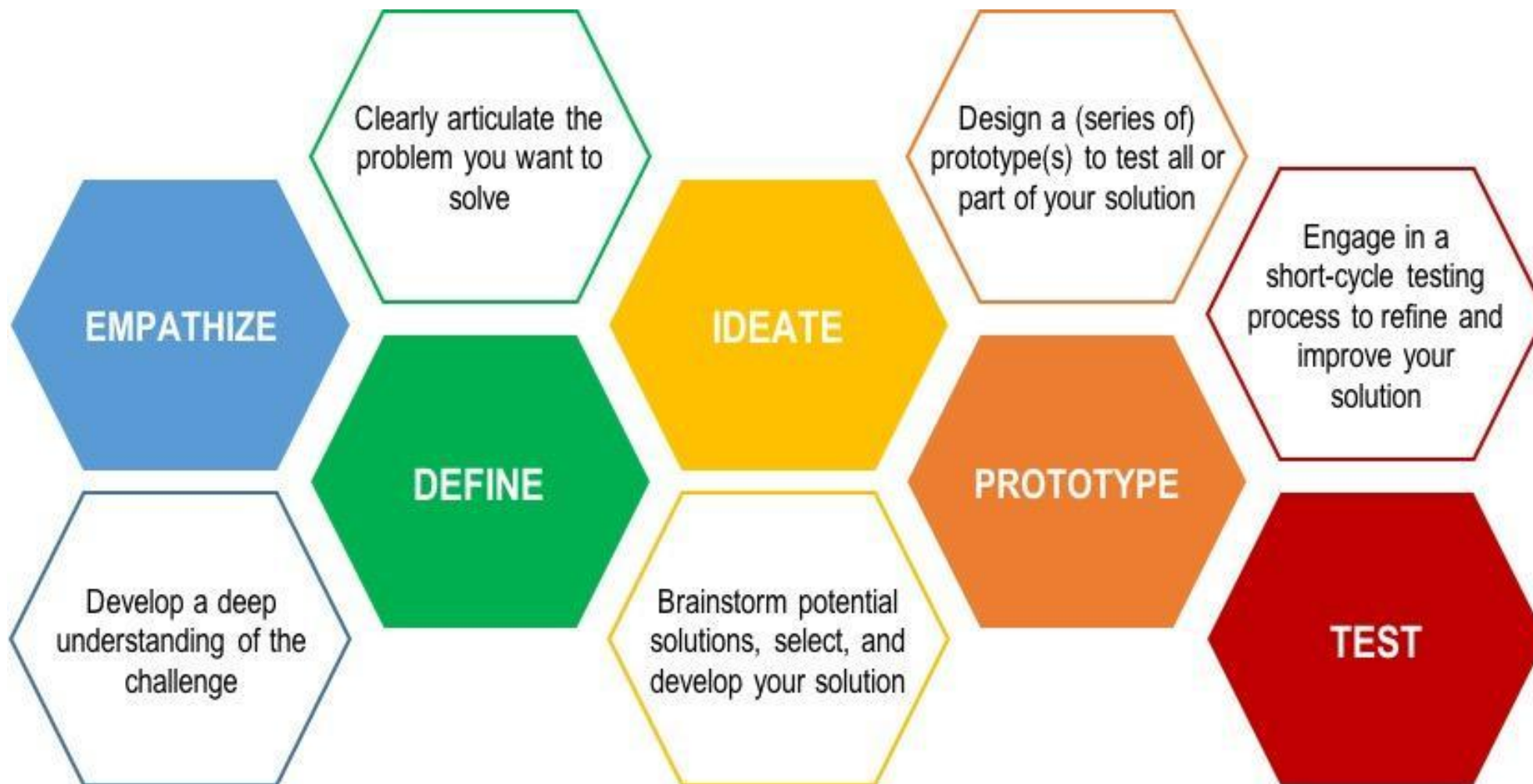
DESIGN THINKING: A NON-LINEAR PROCESS



Source: interaction-design.org

More information: <https://www.heliosolutions.co/blog/5-key-elements-design-thinking/>

OBJECTIVES IN EACH STEP IN DESIGN THINKING



EMPATHIZE

Empathy is the foundation of human-centred design. The problems we are trying to solve are rarely what we own, they're those of particular users. We need to build empathy for our users by learning their values. To empathize, we:

- **Observe.** View users and their behaviour in the context of their lives
- **Engage.** Interact with and interview users through both scheduled and short 'intercept' encounters
- **Immerse.** Wear your users' shoes. Experience what they experience for a mile or two

<https://dschool.stanford.edu/resources/design-thinking-bootleg>



Watching users, capture quotes, behaviours and other notes that reflect their experience.

Interview them, to reveal deeper insights into their beliefs and values.



Immerse yourself in specific environments to understand first-hand who you're designing for.

BUYER PERSONA



Persona

Etapa de **Crear** > Fase de **Mapear** (Cliente)

<p>CARACTERÍSTICAS DEMOGRÁFICAS/COMUNIDAD</p> <p>¿Cuál es su edad? ¿Cómo es su familia? ¿Cuál es su trabajo? ¿Cuál es su nivel cultural? ¿Con quién tiene más confianza? ¿Quién es la persona en la que se apoya?</p>	<p>NECESIDADES/MOTIVACIONES</p> <p>¿Cuáles son sus necesidades o motivaciones en el momento o escena...</p>
<p>PERSONA</p> <p>Nombre. Nuestro usuario es el típico que...</p>	
<p>MOMENTO/ESCENARIO</p> <p>¿Cuál es el momento o escenario donde le situamos?</p>	

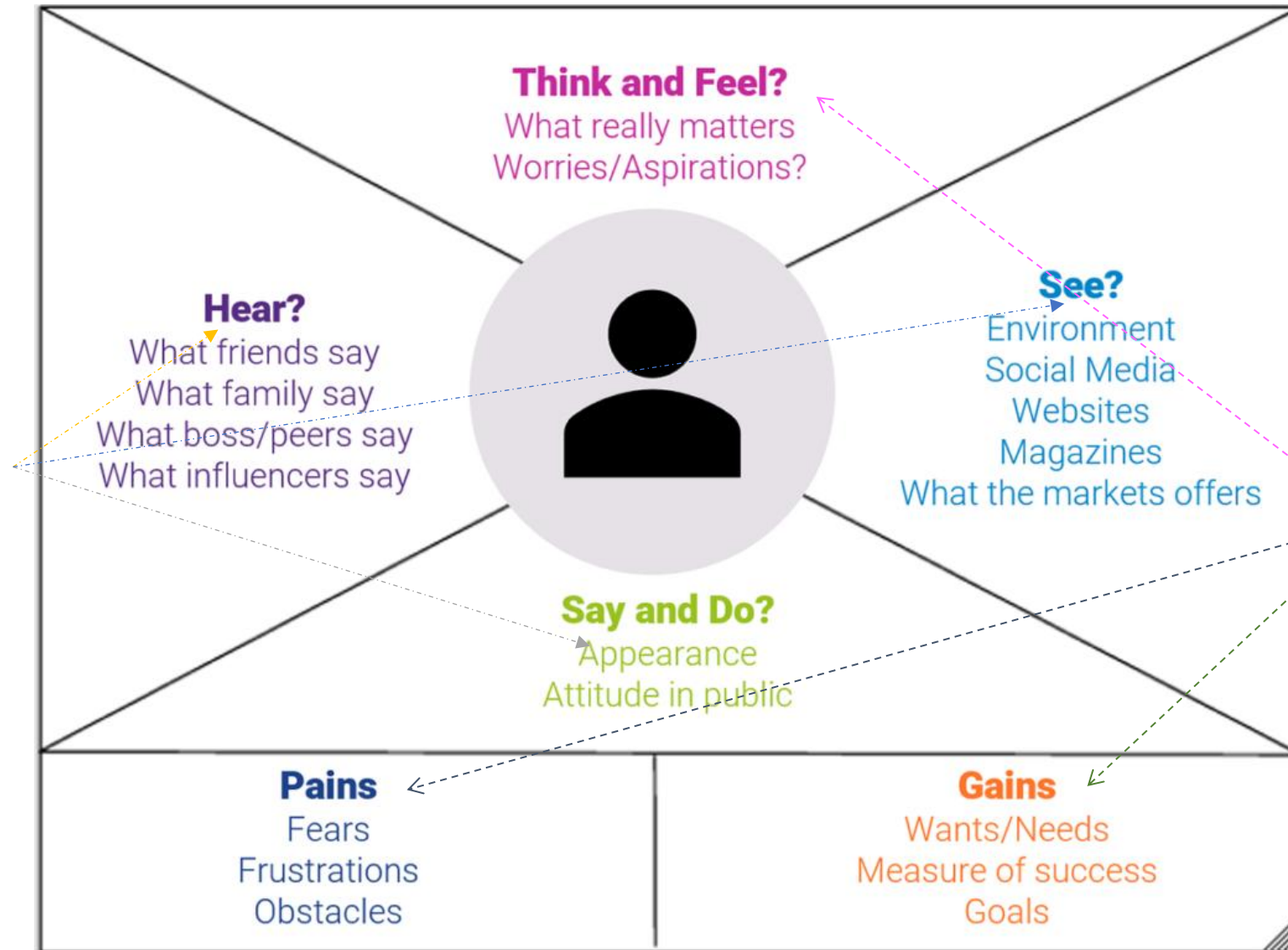
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Fecha: _____
 Proyecto: _____

Buyer Persona

Capture the Outside World.
What he/she...?

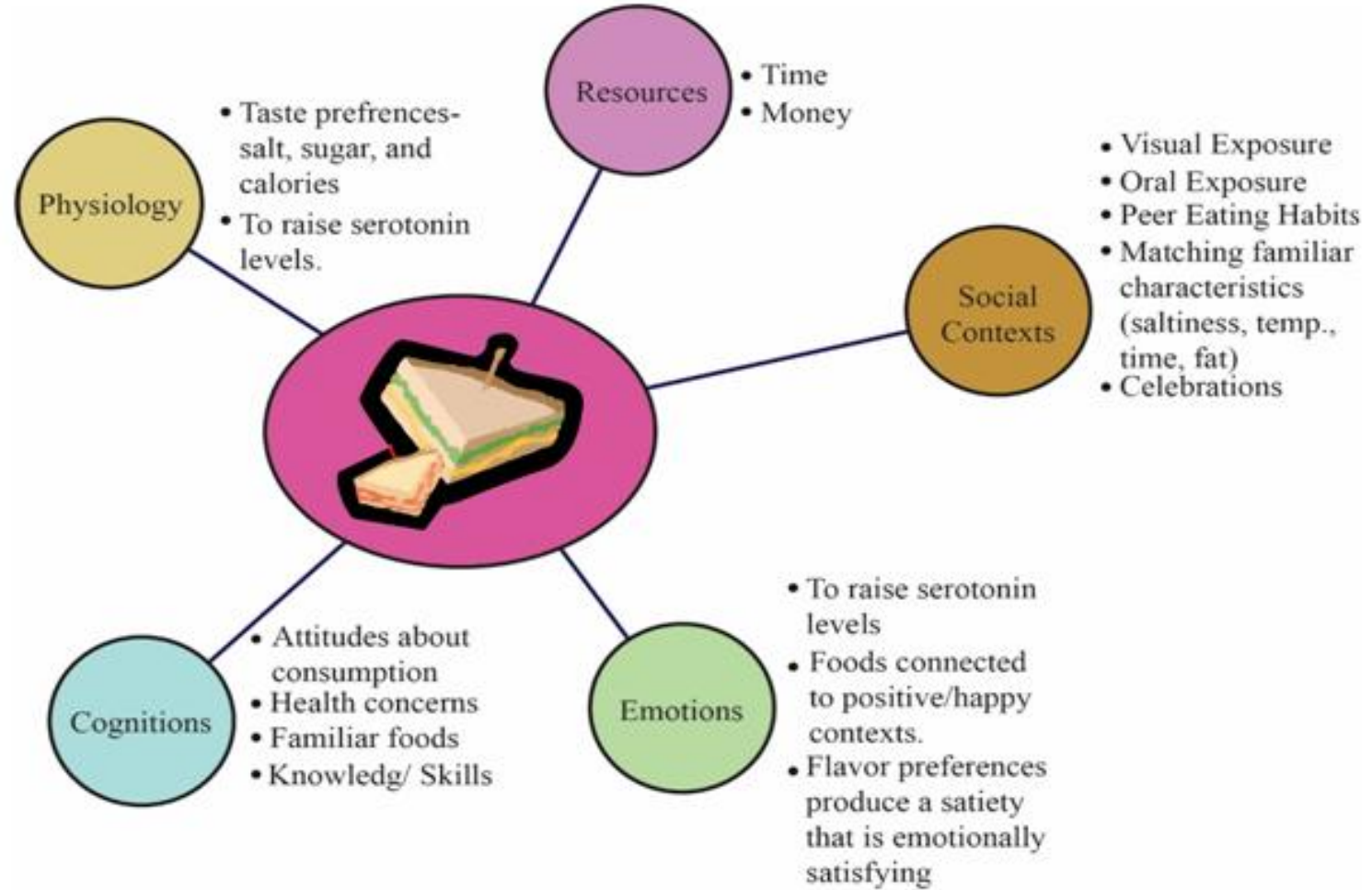


Explore Inside the Mind.
How does she/he?
Capture frustrations and challenges.

Empathy Map

Source: <https://obaninternational.com/blog/empathy-mapping/>

Insights: Factors Influencing Food Intake



EMPATHY TOOLS

Mapa de actores	Inmersión cognitiva	Interacción Constructiva	Mapa Mental	Moodboard
Observación encubierta	¿Qué, Cómo, Porqué?	Preparación de la entrevista	Entrevistas	Usuarios Extremos
Mapa de empatía	SCAMPER	Mundo Café	Mapa del Presente, Mapa del Futuro	Grupos de enfoque o "focus groups"
Técnica de los 5 porqué	Toolkit	Sugiere una		

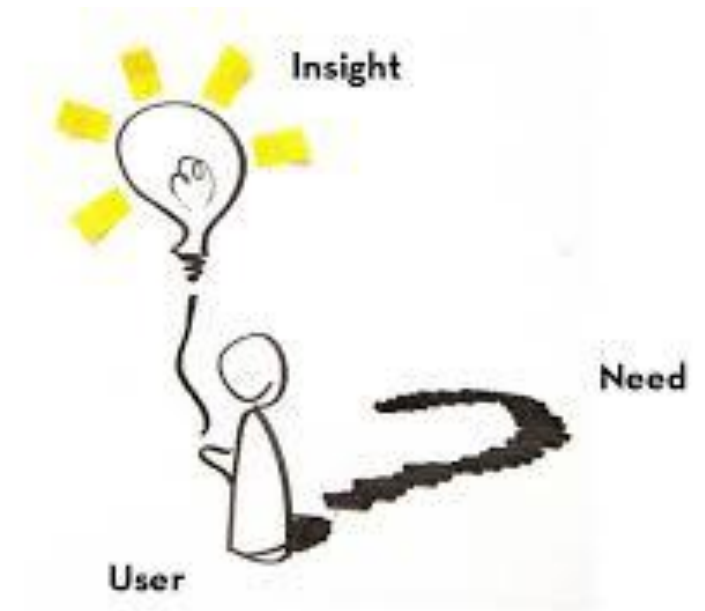
<http://www.designthinking.es/inicio/index.php?fase=empatiza>

-  **Benchmarking**
-  **Brief**
-  **Búsqueda en Medios**
-  **Buzz Reports**
-  **Cliente Misterioso**
-  **Desafío de Diseño**
-  **Entrevista Cualitativa**
-  **Entrevista Experto**
-  **Focus Group**
-  **Foto-Video Etnografía**
-  **Insights Cluster**
-  **Investigación Remota**
-  **Key Facts**
-  **Mapa de Empatía**
-  **Matriz de Necesidades**
-  **Matriz de Tendencias**
-  **Matriz 2x2**
-  **Metáfora Problema**
-  **Persona**
-  **Perspectiva 360**
-  **Poems**
-  **Point of View**
-  **Safari**
-  **Shadowing**
-  **Stakeholders Map**
-  **Visita de Campo**

<https://dothinklab.com/conoce/herramientas/crear/>

DEFINE

- The define mode is when we unpack our empathy findings into needs and insights and scope a meaningful challenge.
- Based on our understanding of users and their environments, come up with an actionable problem statement: our Point Of View.
- More than simply defining the problem, our Point of View a unique design vision that is framed by our specific users.
- Understanding the meaningful challenge at hand and the user insights we can leverage is fundamental to creating a successful solution.



[User (specify who)] **needs** [User necessity/desire/want (verb)] **because**
[INSIGHT (emotional or surprising)]

USERS
(Be very specific)

NEEDS
(verb)

Surprising
INSIGHTS

DEFINE a Problem Statement:

 _____
name

NEEDS TO _____
user's need

in a way that makes them FEEL

insight/meaning

00:03 

Point of view (POV)

DEFINE TOOLS

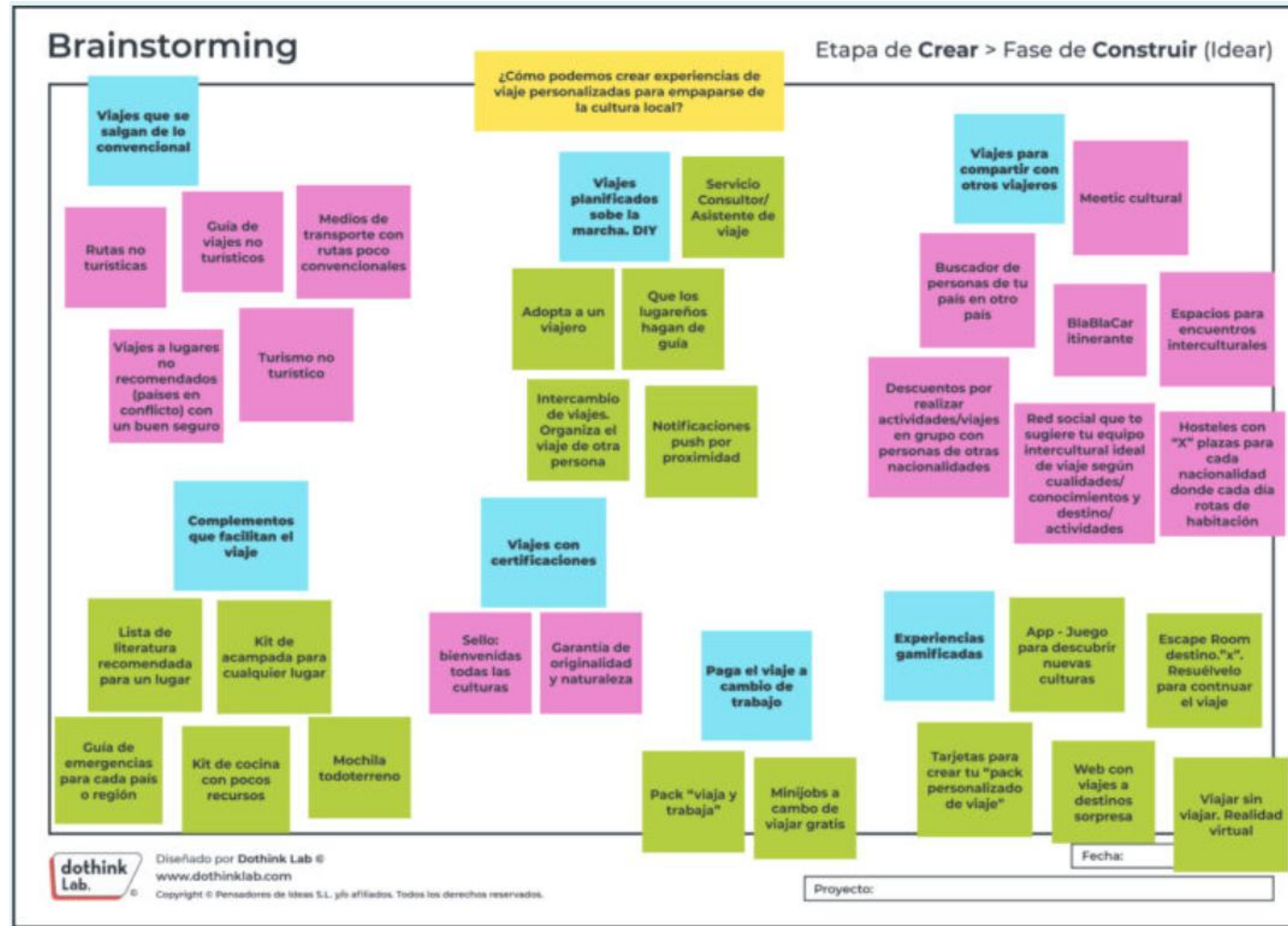
Perfil de usuario	Mapa de interacción de usuarios	Mapa Mental	Moodboard	Personas
Mapa de empatía	Actividades de reactivación	¿Cómo podríamos...? o "HMW questions"	Historias compartidas	Satura y Agrupa, o "Clustering"
Infografía	Insights	Toolkit 	+ Sugiere una	

<http://www.designthinking.es/inicio/index.php?fase=define>

IDEATION

- Ideate is the mode in which we generate radical design alternatives. Ideation is a process of “going wide” in terms of concepts and outcomes—a mode of “flaring” instead of “focus”.
- The goal of ideation is to explore a wide solution space—both a large quantity and broad diversity of ideas.
- From this vast repository of ideas, we can build prototypes to test with users.





Brainstorming

Source: <https://dothinklab.com/conoce/herramientas/crear/>

Flor de Loto

Etapa de Crear > Fase de Construir (Idear)

¿Cómo podemos crear experiencias de viaje personalizadas para empaparse de la cultura local?

Tarjetas para crear tu "pack personalizado de viaje"	App-Juego para descubrir nuevas culturas	Escape Room destino: "x". Resuélvelo para continuar el viaje
Pujas de paquetes de viajes exclusivos, ¿cuánto estás dispuesto a pagar?	VIAJES Experiencias gamificadas	Web con viajes a destinos sorpresa
Random Travel - Viajes sorpresa a lugares exóticos, no sabes a donde vas hasta la semana anterior	Viajar sin viajar. Realidad virtual	Contesta un test y te recomienda 3 opciones de viaje especialmente para ti

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Fecha:

Proyecto:

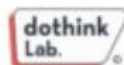
Lotus flower

Source: <https://dothinklab.com/conoce/herramientas/crear/flor-de-loto/>

Cocreación

Etapa de Crear > Fase de Construir (Idear)

IDEAS PROPUESTAS	Affinity People. Rellena las preguntas y te pondremos en contacto con quien te puede ayudar	Wikipedia Company. Todo lo que necesitas saber durante el primer mes de tu equipo	Shadow Day. Cada día serás la sombra de una persona del equipo	TED Team. Cada integrante hará una pequeña presentación explicando en qué puede ayudar al nuevo	Duolingo de Bienvenida. Te ponemos pruebas diarias para que vayas asimilando la información	360° Team. Conoce todo sobre tu equipo de un golpe de vista
ASPECTOS POSITIVOS	Bueno, porque muchas veces al principio da mucha vergüenza preguntar	Genial el tener un repositorio con toda la información relevante de forma centralizada	Para acelerar el aprendizaje lo mejor y más experiencial	Concentrar el conocimiento y hacerlo sintético y directo es realmente útil	Es bueno este formato ya que al inicio estás saturado de info y sólo te quedas con lo último	Encajar con tu nuevo equipo es clave, conocerlos de un golpe de vista es muy potente
ASPECTOS NEGATIVOS	No sabría qué preguntas hacer al principio	"No sé si esto será muy espeso" "Creo que no lo leería nadie. Esto es como las instrucciones de uso"	Con el poco tiempo que tiene la gente, esto no sé si sería una molestia para ellos, el estar todo el día detrás...	Puede caer en que sea muy pesado de escuchar y se haga muy monótono	Tiene que tener alguna especie de gamificación o esto al segundo día ya no le haces caso	¿Cuán afinado sería esto? ¿Serían los compañeros sinceros al decir en qué es bueno cada uno?
¿CONOCES ALGUNA SOLUCIÓN PARECIDA?	Se parece mucho a cuando llamas a Atención al Cliente de cualquier compañía. Si es una persona, bien; cuando es un chatbot, mal	Muchas intranets de empresa ya tienen estos modelos	Los programas de rotación se basan en esto, ¿no?	En las presentaciones en ferias ya se usa este formato para no saturar	Duolingo :)	Los test de afinidad de los equipos
¿CÓMO TENDRÍA MAYOR VALOR PARA TI?	Más que esto, una especie de FAQ. Pero que sea visual, esto en texto debe ser complicado...	Más que una Wikipedia estaría bien un Google de la compañía	Preferible solo media mañana, en vez de un día entero, para no saturar	Mejor sería grabarlo y así poder verlo tantas veces como quieras, y donde quieras	Que hubiera alguna especie de competición para ver quién lo hizo mejor	Poder hacerlos de forma anónima



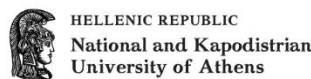
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Fecha:

Proyecto:

Co-creation

Source: <https://dothinklab.com/conoce/herramientas/crear/cocreacion/>



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Perfil de usuario	Dibujo en grupo	Tarjetas	Mapa Mental	Maquetas
Moodboard	Mapa de ofertas	Personas	Prototipado en bruto	Cuenta Cuentos
Actividades de reactivación	Lluvia de ideas	¿Cómo podríamos...? o "HMW questions"	Satura y Agrupa, o "Clustering"	SCAMPER
Selección de ideas	Seis sombreros para pensar	Brainwriting	Consejo de Sabios	Legó® Serious Play®
Storytelling	Impact Mapping	Customer Journey	Flor de Loto	Mundo Café
Grupos de enfoque o "focus groups"	Worldwide ideas	Co-creación	Toolkit	Ideación Basada en Súper Héroes

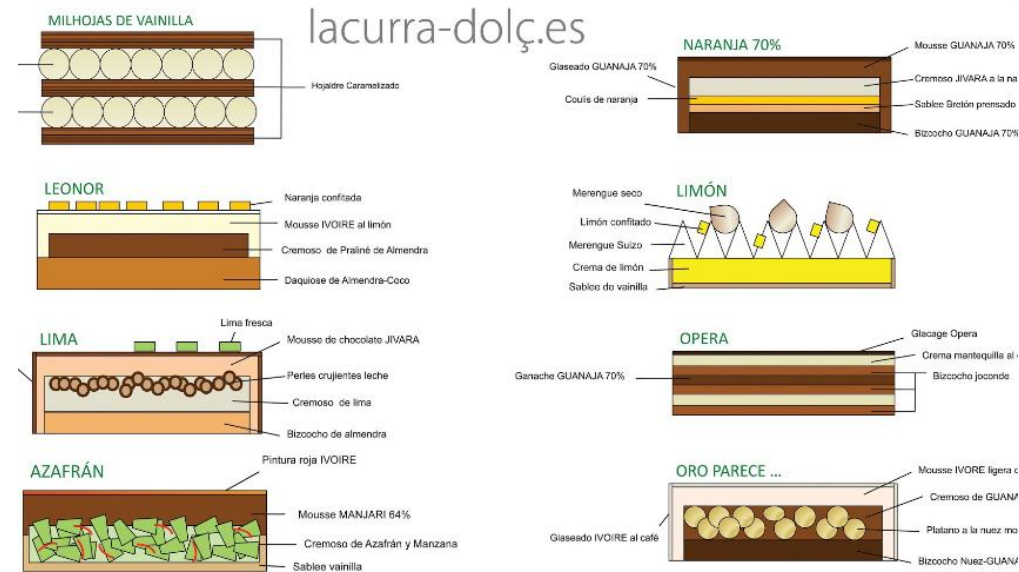
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 Brainstorming	 Business Model Canvas	 Concept Sketch
 Crazy 8	 Customer Journey Map	 Desktop Walkthrough
 Flor de Loto	 Hibridación por Agregación	 Hibridación por Síntesis
 Hibridación por Traslación	 Impresión 3D	 Infografía
 Maqueta de Cartón	 Matriz Creativa	 Mínimo Producto Viable
 Mock Up	 Modelos 3D	 Prototipo Funcional
 Prototipo para Empatizar	 Prototipo para Mostrar	 Prototipo para Pensar
 Prototipo Rápido	 Role Play	 Selección de Ideas
 Service Blueprint	 Coocreación	 Solution Diagram
 Storyboard	 Storytelling	 What If
 Wireframe		

<https://dothinklab.com/conoce/herramientas/crear/>

PROTOTYPE

- Prototyping gets ideas out of our head and into the world.
- A prototype can be anything that takes a physical form—a wall of post-its, a role-playing activity, an object (real, virtual or with Lego). In early stages, keep prototypes inexpensive and low resolution to learn quickly and explore possibilities.
- Prototypes are most successful when people (the design team, users, and others) can experience and interact with them. They're a great way to start a conversation. What we learn from interactions between prototypes and users drives deeper empathy and shapes successful solutions.





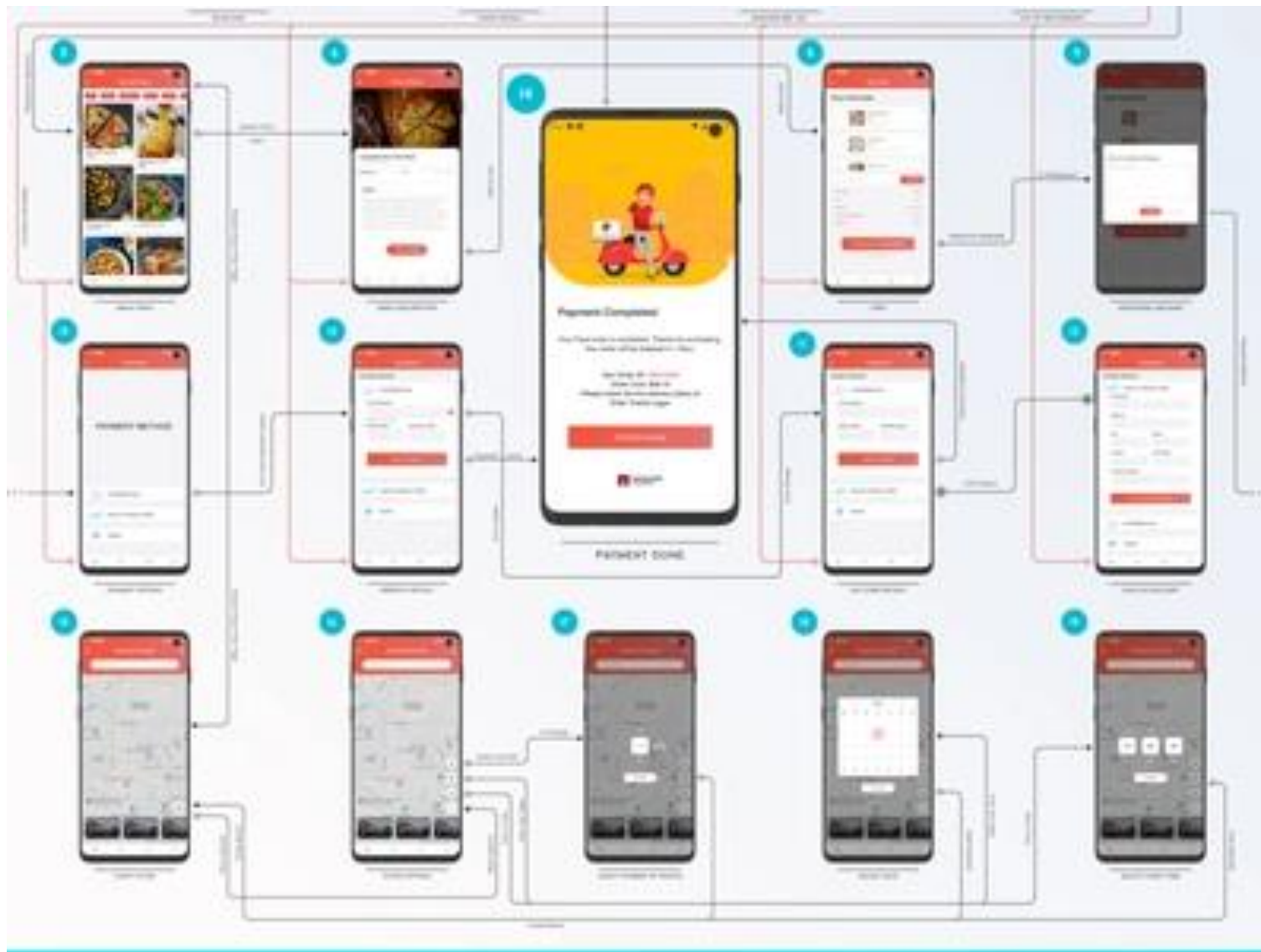
CREATIVE PROTOTYPES

PROTOTYPE VS REALITY



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Storyboard

Source: <https://dothinklab.com/conoce/herramientas/crear>

PROTOTYPE TOOLS

Perfil de usuario	Inmersión cognitiva	Interacción Constructiva	Mapa de interacción de usuarios	Dibujo en grupo
Evaluación controlada	Mapa Mental	Maquetas	Matriz de motivaciones	Mapa de ofertas
Personas	Juego de roles	Prototipado en bruto	Prototipo en imagen	Cuenta Cuentos
Storyboard o guión gráfico	Mapa del sistema	Casos de Uso	Actividades de reactivación	Legó® Serious Play®
Storytelling	Impact Mapping	Infografía	Toolkit	+ Sugiere una

<http://www.designthinking.es/inicio/index.php?fase=define>

 Brainstorming	 Business Model Canvas	 Concept Sketch
 Crazy 8	 Customer Journey Map	 Desktop Walkthrough
 Flor de Loto	 Hibridación por Agregación	 Hibridación por Síntesis
 Hibridación por Traslación	 Impresión 3D	 Infografía
 Maqueta de Cartón	 Matriz Creativa	 Mínimo Producto Viable
 Mock Up	 Modelos 3D	 Prototipo Funcional
 Prototipo para Empatizar	 Prototipo para Mostrar	 Prototipo para Pensar
 Prototipo Rápido	 Role Play	 Selección de Ideas
 Service Blueprint	 CoCreación	 Solution Diagram
 Storyboard	 Storytelling	 What If
 Wireframe		

<https://dothinklab.com/conoce/herramientas/crear/>

TEST



Testing is our chance to gather feedback, refine solutions, and continue to learn about our users.

The test step is an iterative mode in which we place low-resolution prototypes in the appropriate context of our user's life.

“Prototype as if we know we are right, but test as if we know we are wrong”.

TEST TOOLS



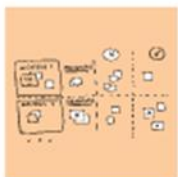
Entrevista Cualitativa



Focus Group



Matriz de Feedback



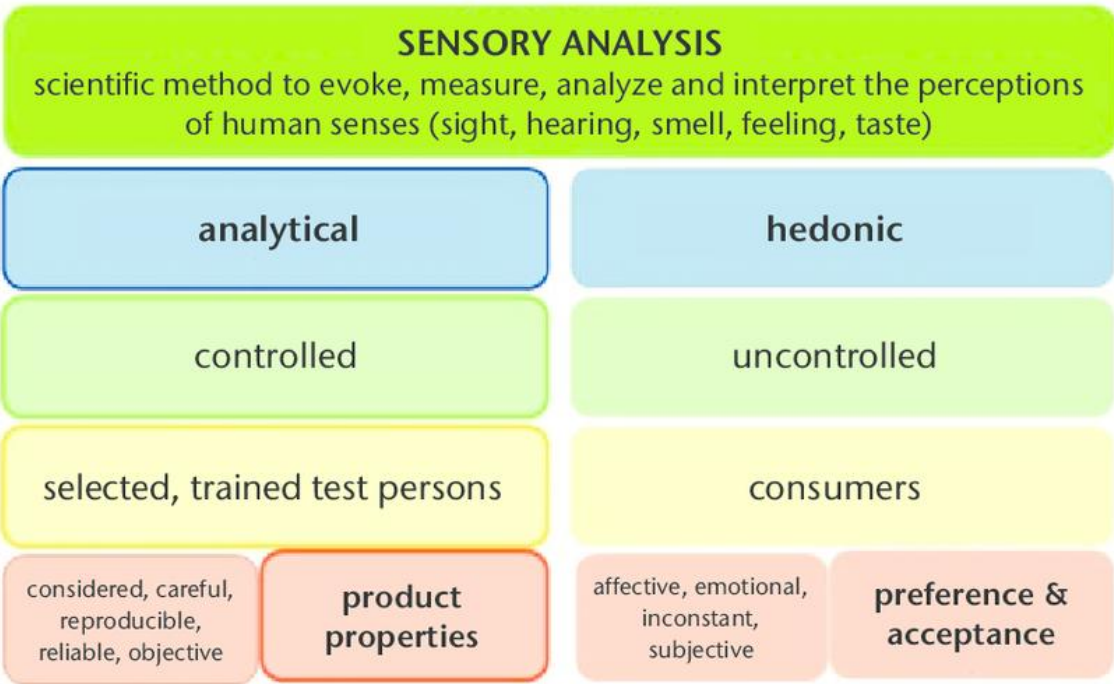
Matriz de Hipótesis



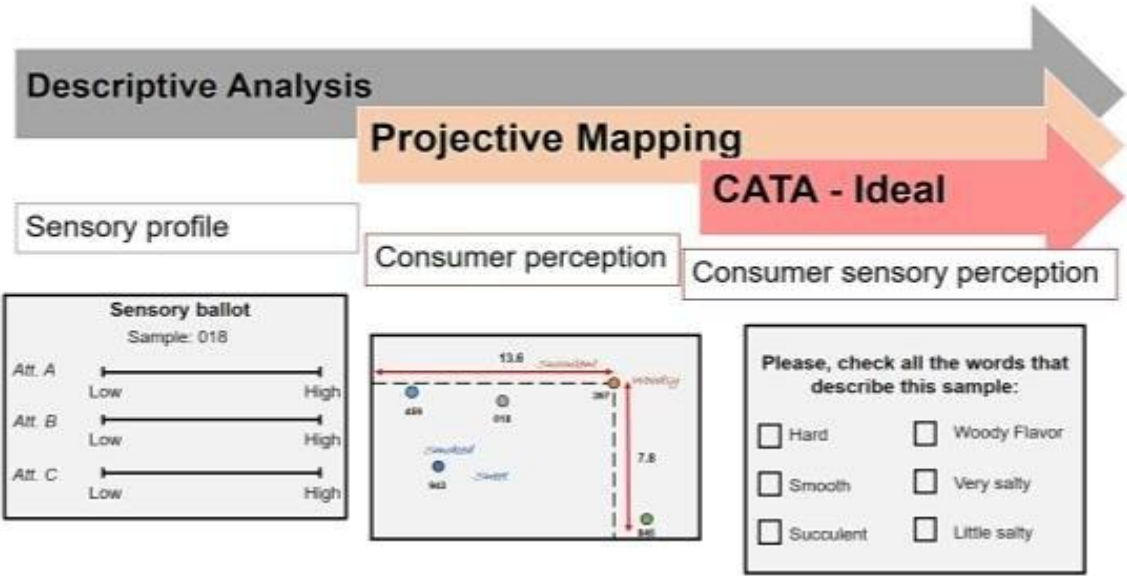
Test de Usuario

<https://dothinklab.com/conoce/herramientas/crear/>

CONSUMER TESTING



Source: Hoehli, K. et al., 2015



Source: Villa, Erick et al., 2019

BOOKS, LINKS & RESOURCES

- Build Once, Sell Twice: The Productization Playbook by Jack Butcher
- Change by Design by Tim Brown
- Creative Confidence by Tom Kelley and David Kelley
- Creative Engineering by John E. Arnold
- David Kelley: From Design to Design Thinking by Maria Camacho
- Good to Great by Jim Collins
- Homo Deus: A Brief History of Tomorrow by Yuval Noah Harari
- Ideo's David Kelley on "Design Thinking"
- Interview with David Kelley by Alex Pang
- Religion for Atheists by Alain de Botton
- Sapiens: A Brief History of Humankind by Yuval Noah Harari
- The Art of Innovation by Tom Kelley
- The Ten Faces of Innovation by Tom Kelley
- The Roots of IDEO's Design Thinking Process by Dexter Francis
- DOTHINKLAB: <https://dothinklab.com/conoce/herramientas/>

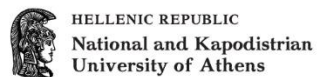
3.2. Food product innovation

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PARTNERS:



Some examples of the latest food innovation trends (from Innova Market Insights, 2025)



INNOVA MARKET INSIGHTS

TREND #1

Ingredients and Beyond

Trend 1. Ingredients and Beyond

As the demand for added value becomes standard, elevating quality beyond ingredients is key

quality brands added value

Trend #1
Ingredients: Taking the spotlight

2024 – Finding the Star Ingredient

The New Standard: Protein Everywhere

Australia, Sep 2024

Germany, Sep 2024

Ireland, Aug 2024

Obstacles

- Easy to replicate
- Lacking identity

2025 - How to Stand Out?

Developing a Coherent Narrative around Quality

#1 Quality of product is the most important factor for consumers in food and beverage brands

US, Sep 2024

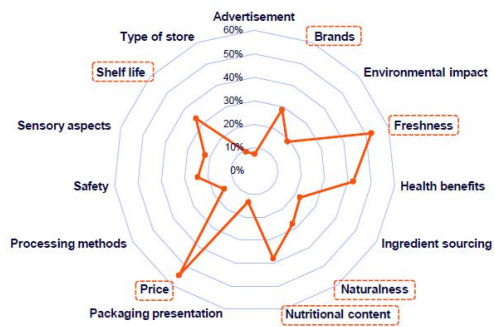
"30g sustained absorption protein"

Sources: Innova Lifestyle & Attitude Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); [Atkins](#)



Examining quality through the consumer lens

What is quality for consumers?



- ✓ 0g added sugar
- ✓ 150 calories
- ✓ Plant-based
- ✓ NO "natural" flavors
- ✓ NO additives
- ✓ Tastes like... cookie dough

"A bar with real benefits"

United States, May 2024

Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); [B.T.R.Nation](#)

Note: Q: Which of the following criteria do you use to assess the quality of food and beverage?



(Innova Market Insights, 2025)

INNOVA MARKET INSIGHTS

TREND #2

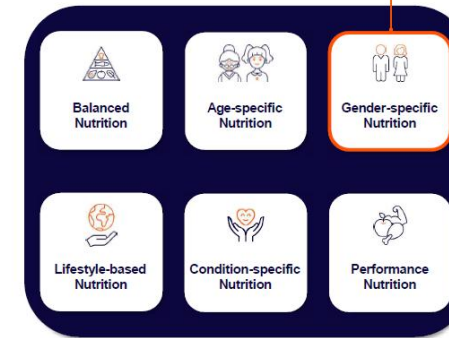
Precision Wellness

Trend 2. Precision Wellness

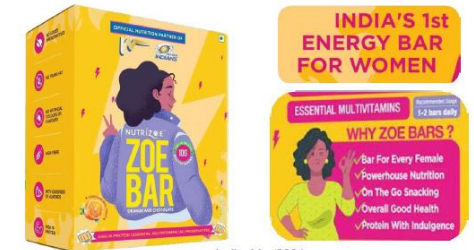
Information culture raises the bar by challenging brands to meet targeted nutritional needs, at any life stage

personalization ingredients functional nutrition

Top Targeted Nutrition Approaches*



+18% year-over-year growth in F&B and supplements with a **women-related claim** (Global, YoY MAT Jun 2024 vs MAT Jun 2023)



India, Mar 2024

Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database;

Note: *Q: Which of the following targeted nutrition is more desirable to you? MAT: Moving Annual Total

Opportunity gaps in targeted nutrition approaches

How is an opportunity gap defined?

When the level of desire for a targeted nutrition approach is higher than the actual purchasing behaviors*

Lifestyle-based nutrition

Next-level of Targeting

Nestlé targets GLP-1 users with protein-rich Vital Pursuit product line

United States, Oct 2024

Performance nutrition

- Premium Protein
- Low Calorie
- Vitamin C
- Electrolytes
- Refreshing Flavours
- Dietary Free

United States, Nov 2024

Sources: Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); [Milk Kitchen](#)

Notes: *Difference between percentages in the following questions: "Which type of targeted nutrition have you purchased in the past 12 months?" and "Which of the following targeted nutrition is most desirable to you?"

(Innova Market Insights, 2025)

INNOVA MARKET INSIGHTS

TREND #3

Wildly Inventive

Delivering the perfect combination that consumers desire through mash-ups

Which type of cross-category mash-ups interests you the most?



Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); [O-Right C1](#); [Newstream](#); Innova Database

Trend 3. Flavors: Wildly Inventive

Consumers crave the extraordinary, prompting companies to delight them with surprising mash-ups that deliver the “wow” effect

unexpected | flavor fusions | mash-ups

43% of consumers globally say:
“I am looking for **crazy creations** that provide me with the **ultimate indulgent experience.**”

Pursuing the “wow” effect

Top Taste & Texture Attributes

“Which **taste & texture attributes** make the food and beverage experience **impressive** to you?”

- 40%** Rich Flavor/Taste
- 31%** Flavor Combinations



Spain, Dec 2024

Sources: Innova Trends Survey 2025 (Average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); [Estrella Galicia](#)

(Innova Market Insights, 2025)

INNOVA MARKET INSIGHTS

TREND #4

Flourish From Within

Trend 4. Gut Health: Flourish From Within

Growing awareness of feeding the microbiome creates a space for the next ingredient to step into the spotlight: fiber

digestive health fiber probiotics

#1

Digestive/ Gut Health is the health aspect mostly driving purchase of functional F&B

+8% year-over-year growth in F&B with a **digestive/gut health claim** (Global, YoY MAT Jun 2024 vs MAT Jun 2023)

SUPPORTS DIGESTION

Recoup Gut Healthy Hydration Prebiotic Sparkling Beverage

"packed with **3 grams of prebiotic fiber**"

United States, Oct 2024

Source: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database; [Recoup Wellness](#)

Note: Q: What are your main concerns related to your physical health?; For which of the following physical health aspects have you purchased functional food and beverage in the past 12 months?

Ingredients are on the horizon for gut health innovations

Top Ingredients in functional F&B for gut health

- 1 Fiber
- 2 Vitamin D
- 3 Probiotics

+24% year-over-year growth in **new snack products** with a **probiotic inclusion** (Global, YoY MAT Jun 2023 – MAT Jun 2024)

"Infused with **probiotics** to support immune and gut health."

CONTAINS PROBIOTICS | SUPPORTS IMMUNE & GUT HEALTH

United States, May 2024

Source: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database

Note: Q: Which ingredient are you looking for in functional food and beverages for gut health?

Innovations in gut health are expanding across various categories

<p>+227% CAGR* Sweet biscuits/cookies</p> <p>Slovakia, Mar 2024</p> <p>"Rich in fiber for good digestion."</p>	<p>+135% CAGR* Cereal & energy bars</p> <p>United States, Jun 2024</p> <p>"Chicory root fiber is packed with gut-beneficial prebiotics, which can improve digestion."</p>	<p>+47% CAGR* Coffee</p> <p>United States, Jul 2024</p> <p>"Sprouting reduces antinutrients such as phytic acid and tannins, increases bioavailability (digestibility) and converts starches to sugar (prebiotics)."</p>
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Sources: Innova Database; [Resist Nutrition Bars](#)

Note: *Average annual growth in subcategory launches tracked with a digestive/gut health claim (Global, CAGR Oct 2022-Sep 2024)

(Innova Market Insights, 2025)



INNOVA MARKET INSIGHTS

TREND #5

Rethinking Plants



Stripping it back: Companies explore a cleaner approach to plant-based

+23% average annual growth in vegan/plant-based F&B with a **natural claim** (Global, CAGR MAT' Jun 2020 – MAT' Jun 2024)

Arla 14 Aug 2024
Lurpak introduced plant-based: Offering consumers a dairy-free alternative with a minimal ingredients list

Plant'd
"With pure natural ingredients and an oat base."
Greece, Jul 2024

MADE WITH CANADIAN FAVA BEANS
More than 80% of what's in these puffs is just Canadian fava beans. Top it off with some other clean ingredients, and you've got these awesome Puffs.
Snack Natural, Regret Nothing. Functional Snacking Made Easy!

PLANT
Plant-based Protein Cakes & Bites
100% natural ingredients

Source: Innova Database; Arla; Green Queen; Fimhurst1925

INNOVA MARKET INSIGHTS 20

Trend 5. Plant Based: Rethinking Plants

The intense buzz of plant-based alternatives has quieted, rerouting consumer's natural pursuits to plants in real and recognizable form

naturalness clean label sourcing

Lack of perceived naturalness as growing key barrier for plant-based products

Why would you not consider buying 100% plant-based products?
Too processed/artificial ingredients

2024 **#5 barrier** 2025 **#3 barrier**



Switzerland, Jun 2024

Top features associated to the term **Plant-based**

42% **Healthy** 35% **Natural**

Ingredients: Water, soy protein, rapeseed oil, flour (rice, beans), spices, beetroot concentrate, yeast extract, cultures, sugar cane, salt, vitamin B12.

Source: Innova Meat, Dairy & Alternative Protein Survey 2024 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Trends Survey 2024 & 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database; [Plant'd](#)

INNOVA MARKET INSIGHTS 19

(Innova Market Insights, 2025)

TREND #6

Climate Adaption

Price sensitivity & climate change: Looking at the consequences for consumers



Price is the top F&B aspect most affected by climate change according to consumers globally

If the price of the product increases, I would...

Stop/ Reduce Buying It



Chocolate



Germany, Sep 2024

Still Buy It

Coffee

Nestlé aims to strengthen coffee supply chain with new high-yielding Arabica variety



Jul 2024



Source: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Choviva; Nestlé
 Note: Q: To what extent do you think the following aspects of food and beverage products are affected by climate change?; What will you do if the price of the following products increases due to the impact of climate change on product sourcing or production? (Select all that apply) - Chocolate confectionary, Coffee

Trend 6. Sustainability: Climate Adaption

Brands and consumers must find balance between personal values and product choices to get ahead of an everchanging climate

climate sensitivity alternatives resilience

Chocolate

Coatings and fillings: Cargill chocolate facility tackles cocoa sector challenges

Aug 2024

Orange Juice

Orange juice crisis: IFF explores citrus product reformulation with alternative fruits

Jun 2024

Tangible Impact in Food & Beverage



48%

Almost half of consumers globally are very or extremely aware of the impact of climate change

Coffee

Coffee concerns: Volatile supplies, extreme weather and soaring prices weigh heavy on the sector

Aug 2024

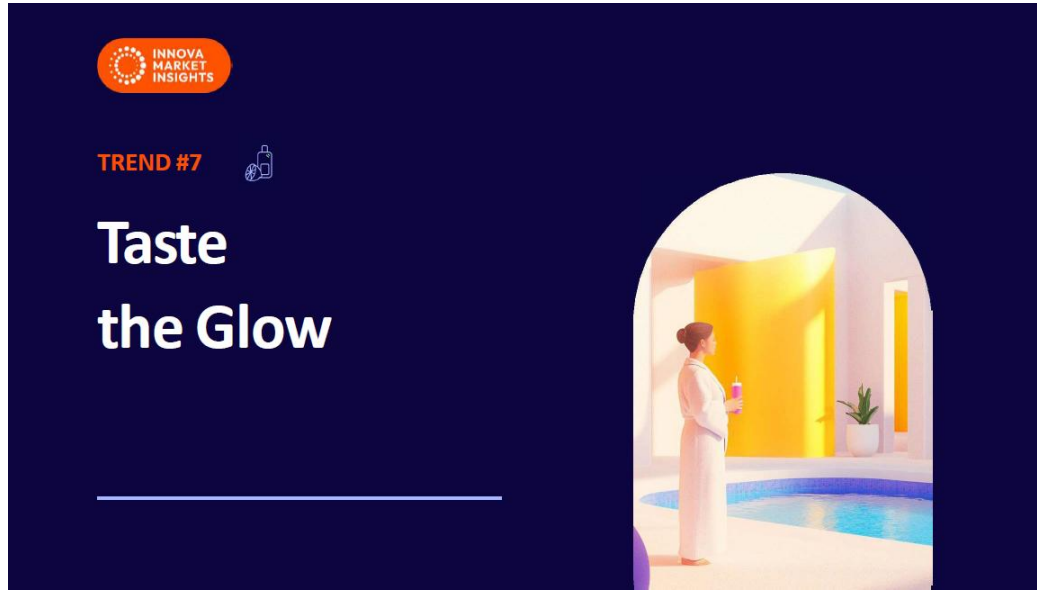
Olive Oil

Olive oil prices climb as production falls to lowest levels in a decade

May 2024

Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Food Ingredient
 Note: First (1); (2); (3); (4)
 Q: To what extent are you aware of the impact of climate change?

(Innova Market Insights, 2025)



INNOVA MARKET INSIGHTS

TREND #7

Taste the Glow

Trend 7. Taste the Glow

With the cosmetic industry booming, now is the time to bring beauty-enhancing features into food

appearance collagen skin health



1 in 5

consumers globally have purchased F&B to improve physical appearance/beauty in the last year

+11% year-over-year growth in new F&B and supplement launches with a beauty claim* (Global, YoY MAT Jun 2023 – MAT Jun 2024)

Top Opportunity Areas

- #1 Facial skin
- #2 Hair
- #3 Body skin



Make beauty a ritual as you sip towards radiant skin and stronger hair.

RESULTS YOU CAN EXPECT

- 1 WEEK: Collagen and Vitamin E boost initial skin hydration for a subtle improvement in moisture.
- 1 MONTH: Continued collagen intake improves skin texture, reduces dryness, and subtly diminishes fine lines.
- 3 MONTHS: Collagen, Biotin, and Vitamin E supplements improve skin elasticity, enhance radiance, and promote healthier hair and nails with long-term use.

India, Apr 2024

Younger generations drive purchase in F&B for skin health

+15% growth in new F&B and supplement launches with a skin claim (Global, CAGR MAT Jun 2019 – MAT Jun 2024)

Purchasing functional F&B for skin health – Generational Differences

- collagen absorption
- skin firming
- skin lifting
- skin moisturizing



United States, Aug 2024

Generation Z	27%
Millennials	25%
Generation X	17%
Boomers	13%

Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database; The Purest
 Note: Q: For which of the following physical health aspects have you purchased functional food and beverage in the past 12 months? (responses for skin health)

Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database
 Notes: Beauty claims include F&B and supplement launches tracked with skin health positioning and/or with ("for beauty" "rejuvenate your skin" "skin rejuvenation" "beauty boosting" "glowing skin" "skin health" "your skin glow" "better skin" "hair" "beautiful skin" "everyday beauty" "health and beauty" "beauty and health" "Glow from the inside")-"angel hair") in product description, claims features and extra notes Q: To what extent do the following physical appearance aspects concern you?

INNOVA MARKET INSIGHTS

TREND #8

Tradition Reinvented

Leveraging tradition to connect to the nostalgic consumer



Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database; M&M's

Note: Q: To what extent do you agree with the following statements?



Trend 8. Food Culture: Tradition Reinvented

In a world constantly evolving, consumers wish to rediscover the flavors of their culinary heritage, embracing authenticity and tradition

authenticity vintage heritage

Nearly **1 in 2** consumers globally find the following values important in their diet

My tradition
Food that express my heritage

Your tradition
Diversity of food cultures

hand-finished

Handmade like grandma made it. Every cake is full of love and passion.



Germany, Jul 2024



"This butternut squash pasta sauce is made in Italy, based on a traditional recipe, with beautifully authentic flavors of earthy squash, rich Italian cheese, herbs and spices."

US, Sep 2024

Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database; Note: RUF

*Q: To what extent are the following values important to you in your diet? – Tradition, Diversity



(Innova Market Insights, 2025)

INNOVA MARKET INSIGHTS

TREND #9

Mindful Choices

Trend 9. Mood Food: Mindful Choices

As consumers prioritize their mental and emotional wellbeing, brands are crafting innovations that connect with their feelings

High attention of consumers towards Mental Health



36% of consumers globally say

Feeling mentally/emotionally well is the **primary health goal**



Goal:
Fulfilling the Opportunity Gap



"Enriched with ashwagandha, which supports the body's resistance to stress."

Poland, Mar 2024

Low association between mental health & functional F&B

Mental aspects for which consumers purchase functional food:

#1 None of the aspects is a purchase driver

#2 Stress & anxiety

#3 Tired & fatigue

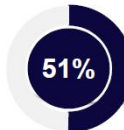
Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database; Nutrition Insight: Cadences
Q: What are your main concerns related to your mental health? For which of the following mental health aspects have you purchased functional food and beverage in the past 12 months?



Opportunities to utilize vitamins for demonstrating mood-enhancing benefits

Top 5 ingredients desired in functional F&B for mental health

- Vitamin B6, B9, B12
- Vitamin D
- Vitamin C
- Magnesium
- Vitamin E



Contains **magnesium and vitamin B6**: "powerful combo for physical and mental calmness."



United States, Aug 2024

BENEFITS

- MENTAL CLARITY & FOCUS
- PROMOTES LEARNING & MEMORY
- STRESS MANAGEMENT
- FATIGUE REDUCTION & RECOVERY
- CALMNESS

Sources: Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); Innova Database
Notes: Q: Which ingredients are you looking for in functional food and beverage for mental health?

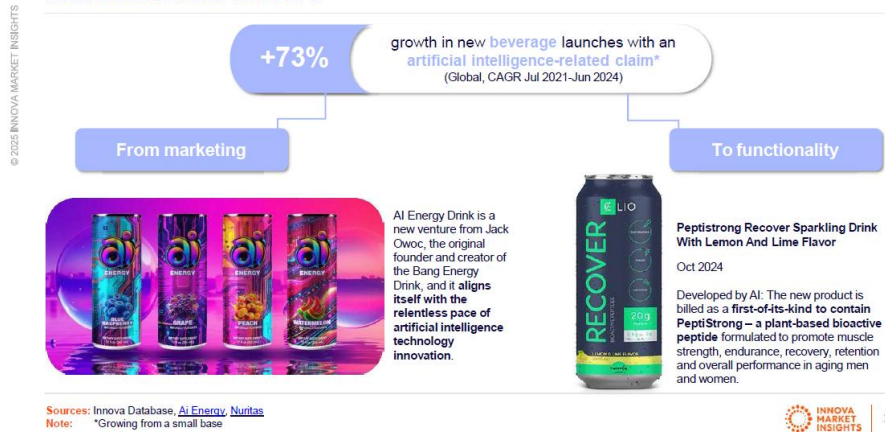


(Innova Market Insights, 2025)

TREND #10

Bytes to Bites

The beverage market is currently the leader in providing communication to consumers in the use of AI



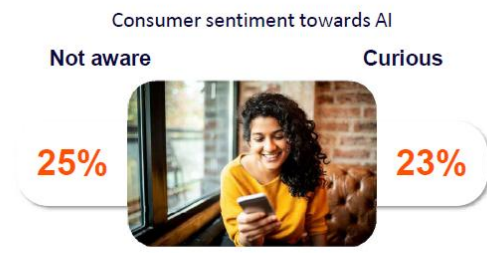
Top Trends: Top 10 F&B Trends 2025 - Global - Extended Analysis - Dec 2024

Trend 10. AI: Bytes to Bites

Brands are beginning to unlock the full power of AI, moving from infinite capabilities to concrete applications that elevate consumer experiences

technology personalization ideation

+720% year-over-year growth in F&B with an artificial intelligence-related claim (Global, YoY MAT Jun 2024 vs MAT Jun 2023)



SarprAIse! Europe's first AI ready-to-drink fruit wine mix

Germany, Mar 2024

Sources: Innova Database; Innova Trends Survey 2025 (average of Brazil, Canada, China, France, Germany, India, Indonesia, Mexico, Spain, UK, US); [Kaltenburger](#)
Note: Q: How do you feel about food and beverage that are created by AI?

(Innova Market Insights, 2025)