



**I want to eat, drink and live to optimise my body's systems, to feel better than well today *and* tomorrow...**

focus on sleep Self-care &  
wellness as status emotional wellbeing  
**interrelated systems**

Awareness of gut and mental performance diets  
neural connections **healthy ageing**

**Lifestyle** navigating health advice

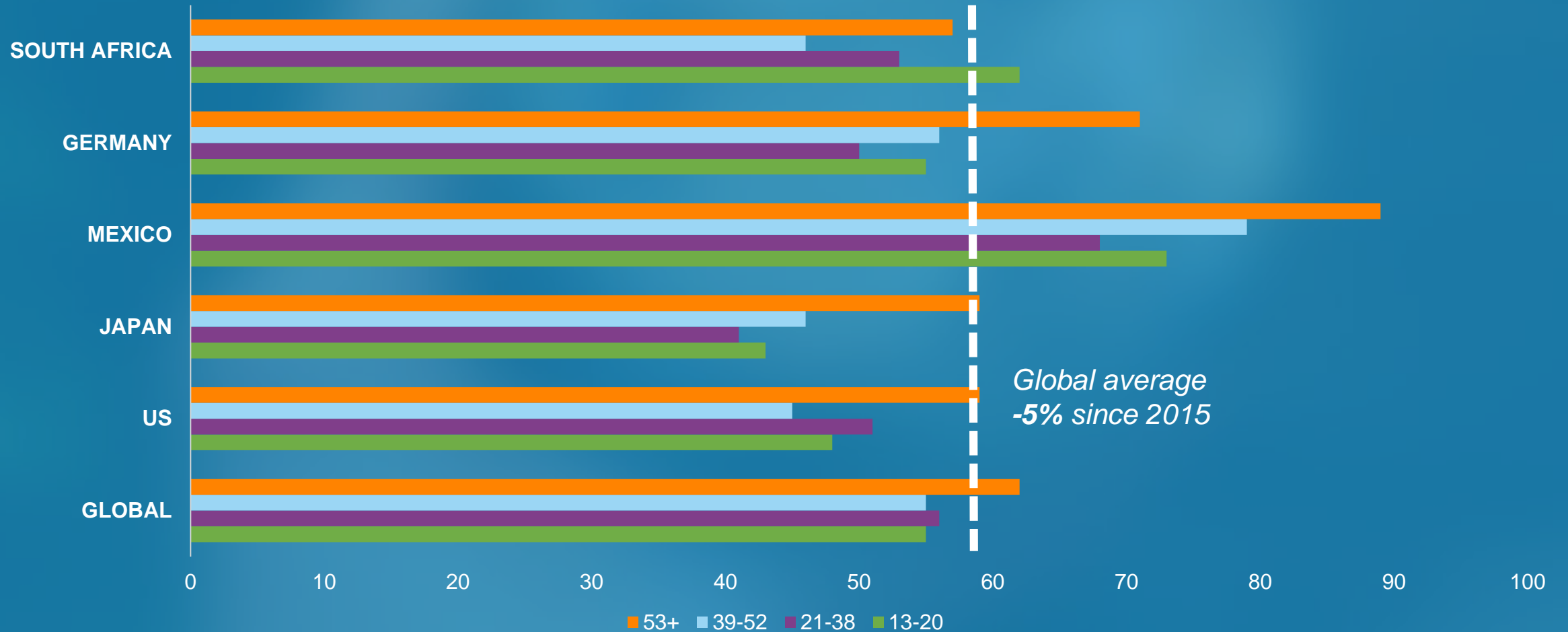
**philosophies** genetic traits

**trackers and sensors**

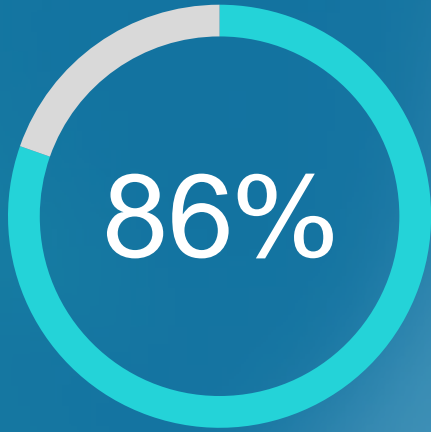
intensifying public health initiatives  
Self-diagnosis & empowered consumers



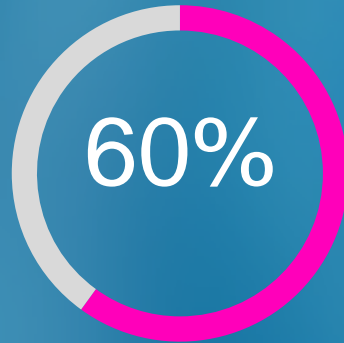
"I think having the tools to monitor my own health on a regular basis is very important"



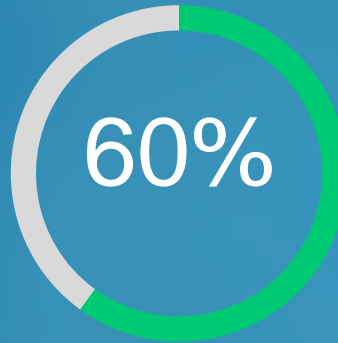
"Not getting enough sleep causes me stress"



Global  
+1% since 2015



US



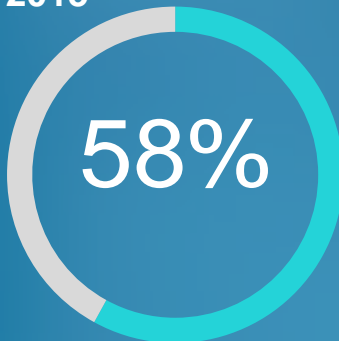
UK



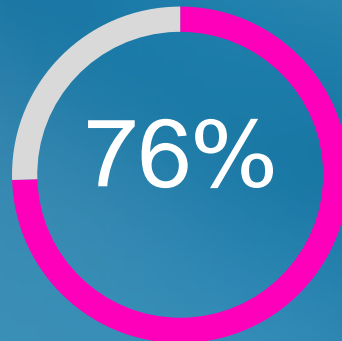
Mexico



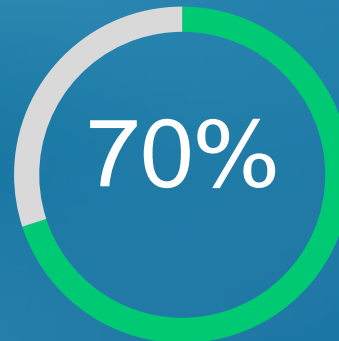
Germany



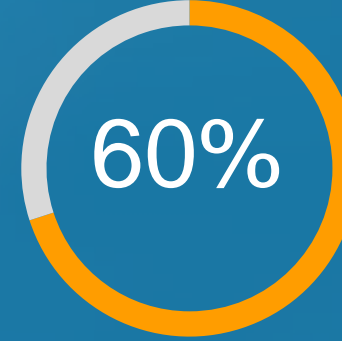
China



Malaysia



Japan



South Korea

WHAT'S DRIVING THE TREND?



**Redefining  
of old age**

**The perception of 'old age' is changing drastically, driven by longer life expectancy and increasing wealth and health levels of older populations in many markets**

The global 85-and-over population is projected to increase by 351% between 2010 and 2050, compared to a 22% increase for the population under the age of 65.



**Growing digital  
connectivity**

**Constant connectivity has unlocked consumer desire to monitor and track health – and now consumers look for proactive ways to improve their scores and connect different aspects of their lifestyle**

35% of global consumers actively “wish there were more technology tools and apps that would manage their life”, up 5% from 2015, while 58% say they are on the internet constantly throughout the day (vs 49% in 2015).



**Rise of lifestyle diseases**

**Across the world, rising prosperity and access to convenient, processed foods are leading to a higher incidence of life-threatening health conditions, such as obesity, diabetes, cancer and heart disease.**

Obesity is predicted to become increasingly prevalent, becoming the seventh biggest cause of death globally by 2030, with much of the growth coming from emerging markets.

## WHAT'S DRIVING THE TREND?: DRIVERS



### Growing digital connectivity

The number of connected wearable devices worldwide is expected to jump from 325 million in 2016 to over 830 million in 2020.<sup>1</sup>



### Redefining of old age

In the US, over 60s will hold 24% of total income by 2020.<sup>2</sup>



### Rise of lifestyle diseases

One fifth of all adults in the world will be obese by 2025.<sup>3</sup>

1 in 6 people in the past week experienced a common mental health problem.



HEALTH &

Wellbeing

## HOW IS IT MANIFESTING?: SUB-TRENDS

### Health as Systems

We increasingly understand our body as interrelated systems, and seek to improve them with diet, from the inside-out, and through external, tech-enabled stimulation.

### Expert Enhancement

Democratised information leads to an increase in 'expert' voices when it comes to health. Consumers are reaching for tech-enabled, personalised and verified solutions for enhancing their diet and wellbeing.

### Rediscovering Natural

Health-savvy consumers and innovators are discovering and extracting the true wellness benefits of natural ingredients, giving certain products a surge of popularity or a new lease of life.

### Engineering Goodness

Increasing consumer expectation for alternatives to products perceived to be unhealthy is driving the growth of solutions reshaping our overall diet.

### Optimising Age

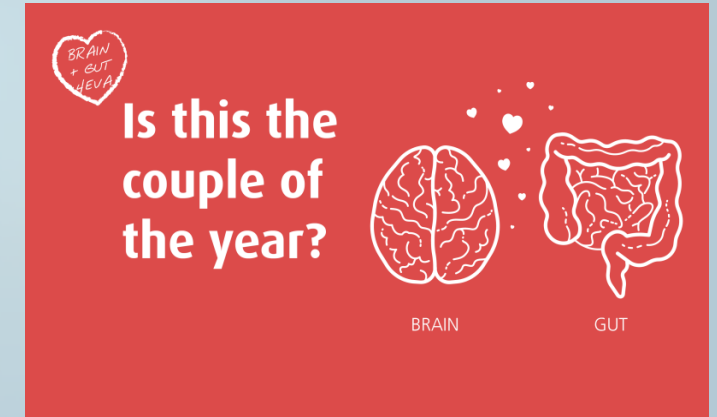
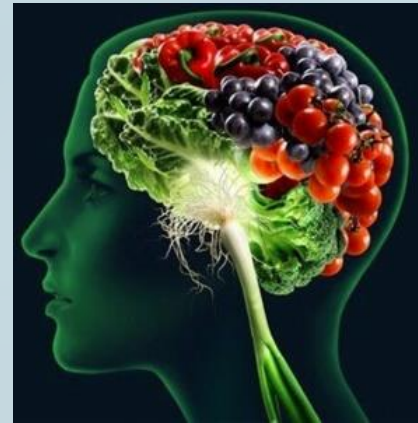
With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies.

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## HEALTH AS SYSTEMS



### HOW IS IT MANIFESTING?

*Through the eyes of our Streetscapers...*

*"More and more Koreans are trying to find the balance between work and free-time and to search for the meaning of life."*

*Gayang, South Korea*



South Korea



Denmark

*Healthy good quality food permeates everyday life in Denmark. So much so that the international convenience store 7/11 serves Paleo food that promotes digestive functionality and mental alertness"*

*Kinvara, Denmark*

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## Health as Systems



Only 43% of the cells in the human body are human. The rest is taken up by our microbiome that includes bacteria, fungi, single-celled, archaea and viruses...  
2018 study by bioRxiv.org



**Apps that facilitate mental health**

Moodo – using fragrances to create a stress-free and healthy environment

Thync – non-invasive bioelectronic platform which targets certain nerves for electrical stimulation - used to combat mental health illness and autoimmune disorders

**Bio-dynamic ingredients to improve physical and mental wellbeing**

High Mood Food – natural, fermented and living food, promoting the link between digestion and mental health

WellWell – organic cold-pressed juice with biodynamic (fermented) lemon, a performance enhancer and counter-fatigue drink



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Democratised information leads to an increase in 'expert' voices when it comes to health. Consumers are reaching for tech-enabled, personalised and verified solutions for enhancing their diet and wellbeing, and mitigating risk.



## EXPERT ENHANCEMENT

### HOW IS IT MANIFESTING?

*Through the eyes of our Streetscapers...*

*"Word of mouth and influencer endorsement are the key forms of advertising for wellness brands in Mexico."*

*Mariana, Mexico*



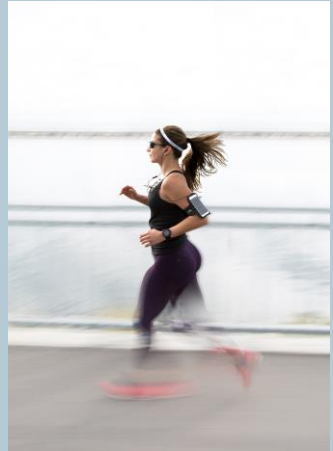
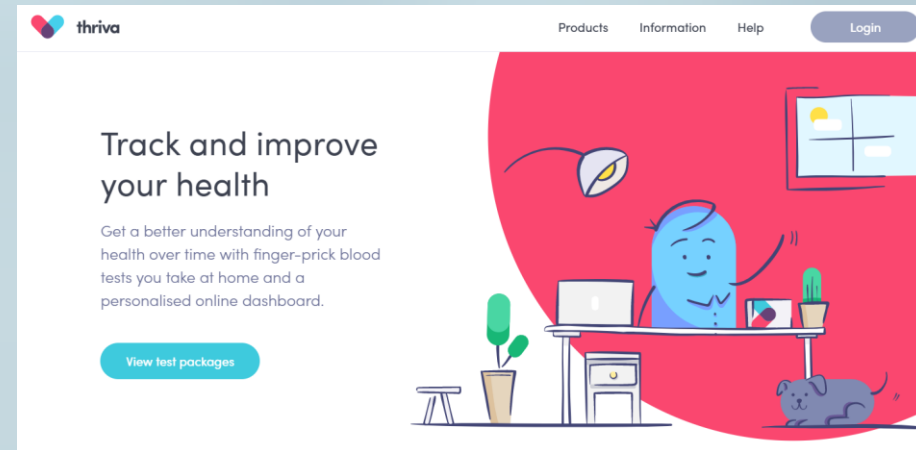
Mexico



Germany

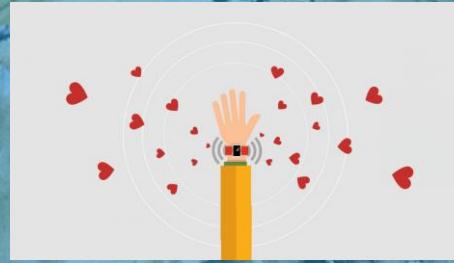
*"Consumer choices are made out of practicality and better, tech-enabled insight as they wish to make reasoned and responsible decisions."*

*Paul, Germany*

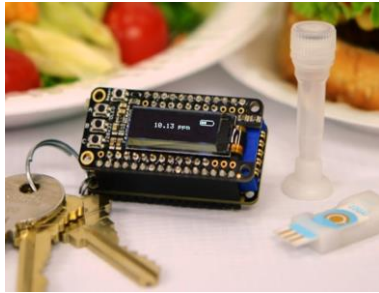


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## Expert Enhancement



Google and Fitbit are collaborating to merge Fitbit tracking with electronic medical records for a comprehensive data set for patient and clinicians.



iEAT allergen detection system, a portable key ring food scanner and 'allergen alert'

Processes previously restricted to science labs are now mainstreaming for families



Lumo Lift is a corrective wearable which vibrates when you are hunching or can help correct your stride

Lumo Lift aims to reduce visits to medical specialists and physiotherapists

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Health-savvy consumers and innovators are discovering and extracting the true wellness benefits of natural ingredients, giving certain products a surge of popularity or a new lease of life.

## REDISCOVERING NATURAL

### HOW IS IT MANIFESTING?

*Through the eyes of our Streetscapers...*

*"It seems our dark Tualang honey is gaining popularity outside of Malaysia – we understand now it is good for amino acids and vitamins, much like other traditional ingredients here."*

*Lavina, Malaysia*



Malaysia



United Kingdom



*"We're trying to incorporate berries into everything now we're shown their pigment contains cancer-fighting enzymes."*

*Lucy, UK*

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## Rediscovering Natural

The global **Natural Health Extracts** market is set to grow **8% YoY to 2024**

Newfoodmagazine.com, 2017



### Major health foods retailer Planet Organic embraces Ayurvedic anti-inflammatory and antioxidants

Traditional Eastern medicinal herb turmeric (and related curcumin) now features in products as diverse as popcorn, to tea and coffee, granola and chocolate



### Increasingly popular health influencer profiles highlight the most innovative and beneficial natural extracts

Like @realfoodology, (Courtney Swan) who has gathered 113k followers since she began her online campaign against antibiotics

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Increasing consumer appetite for alternatives to products perceived to be unhealthy drives growth of solutions reshaping our overall diet

## ENGINEERING GOODNESS

### HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...

*“Food and drink in Japan occupies a strange place in 2018. In general, consumers are inclined to eat at cheaper restaurants — McDonald’s has seen a massive sales spike in recent years – although interest in more expensive and novel alternatives is also sky rocketing”*

*Patrick, Japan*



Japan



Denmark



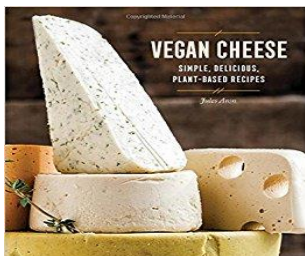
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Engineering Goodness

# \$5.2 billion

projected value of the global meat substitutes market in 2020

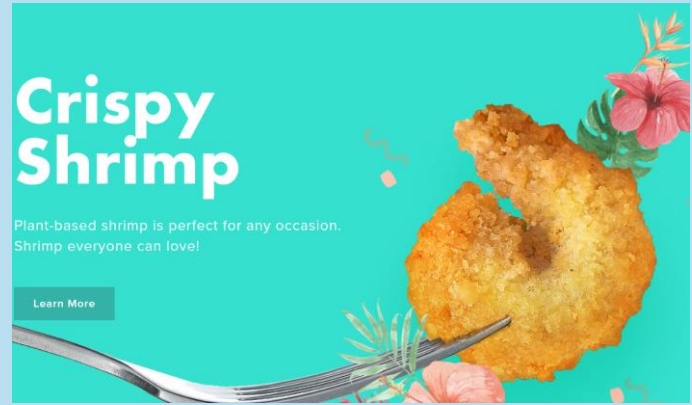


## Identifying plants that blend like egg

Given the vilification of high levels of cholesterol found in eggs, and therefore mayonnaise, JUST mayo's yellow split pea formula is true engineered goodness

## Crispy Shrimp

Plant-based shrimp is perfect for any occasion. Shrimp everyone can love!



**Vegan seafood: New Wave Foods and Ocean Hugger Foods enter US institutions as part of the 'Healthy for Life 20 by 20' initiative**

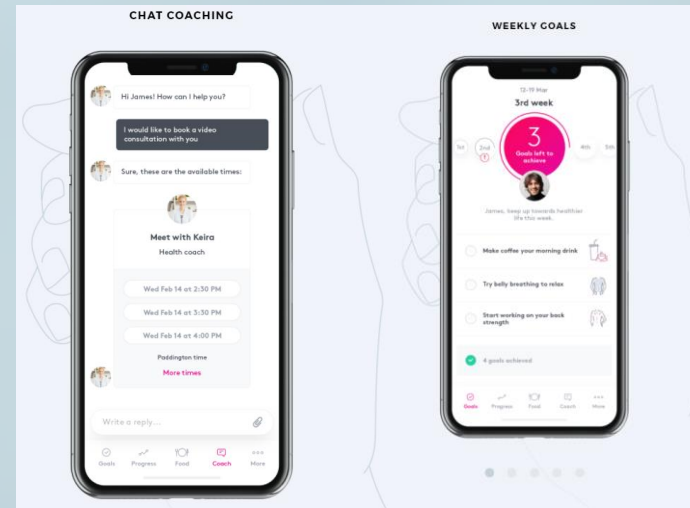
Vegan prawns and plant-based raw tuna are free from marine toxins, high mercury levels & contaminants found in polluted ocean fish farms

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From awareness of the different needs for stages of teen development to the nuanced protein needs of the older generation, we are seeking age-targeted solutions for living better, not just longer

## OPTIMISING AGE



### HOW IS IT MANIFESTING?

Through the eyes of our Streetscapers...



United Arab Emirates

*“In the UAE We see younger generations all very health conscious compared to the baby boomers in the way they eat and their choices, older generations take a smaller but growing interest in where their food comes from and the health effect of their everyday choices”*

Zaina, UAE



South Korea

*“There is a recognized respect in older generations’ ways of life, returning to farm and rural settings is increasing, and Jeju Island, a Korean vacation island, has become a dream destination for many young Koreans to realize the ideal slow-lifestyle exemplified by older generations”*

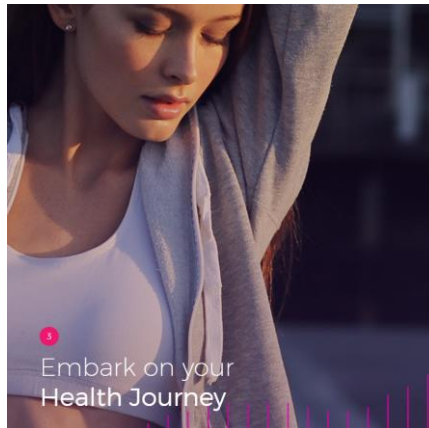
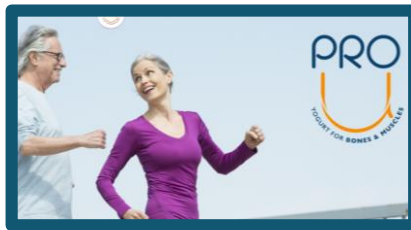
Gangyeong Seo, South Korea

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## Optimising Age



This year, Hong Kong hosted its first 'GeronTech' summit, exploring ageing and technology to find solutions for the market's 'super-aged' population, funded by government and private players



Chinese dairy giant Mengniu is growing sales by 20-30% this year with age-targeted product launches

'Future Star Growth Milk' teamed up with Disney Shanghai to tap into the 8-10 years and early adolescent market



Chinese restaurant Kaze no Oto has developed new cooking methods to cater to the country's aging population

The 'Seniors' menu at this restaurant is processed, supplemented with enzymes and remoulded into original form, making it easier to chew and digest



# WHAT DOES A SUCCESSFUL BUSINESS LOOK LIKE IN 2025?

## IT IS TECH-ENABLED, BUT HUMAN-LED

Food and drink brands that can capitalise on the technologies used to profile consumers, and deliver guidance and health benefits.



## IT TAKES A FRESH LOOK AT AGE AND LIFESTAGE

Food and drink can be the key to unlocking and activating the natural wellness our own body systems can achieve in different periods of our life.



## IT INNOVATES ALTERNATIVES TO UNHEALTHY PRODUCTS

Brands that invest in R&D to solve for particular dietary problems and public health concerns will win.

