

# FUTURE FOOD



backslash

\ 2023

# WELCOME TO THE FUTURE

Welcome to 'Future Of,' a report that explores what will — and more importantly what should — come next in must-watch categories.

At Backslash, we believe that culture is the biggest opportunity and threat to businesses today. With support from over 300 Culture Spotters, we closely observe and analyze worldwide developments so that TBWA — and our clients — can better understand and anticipate change.

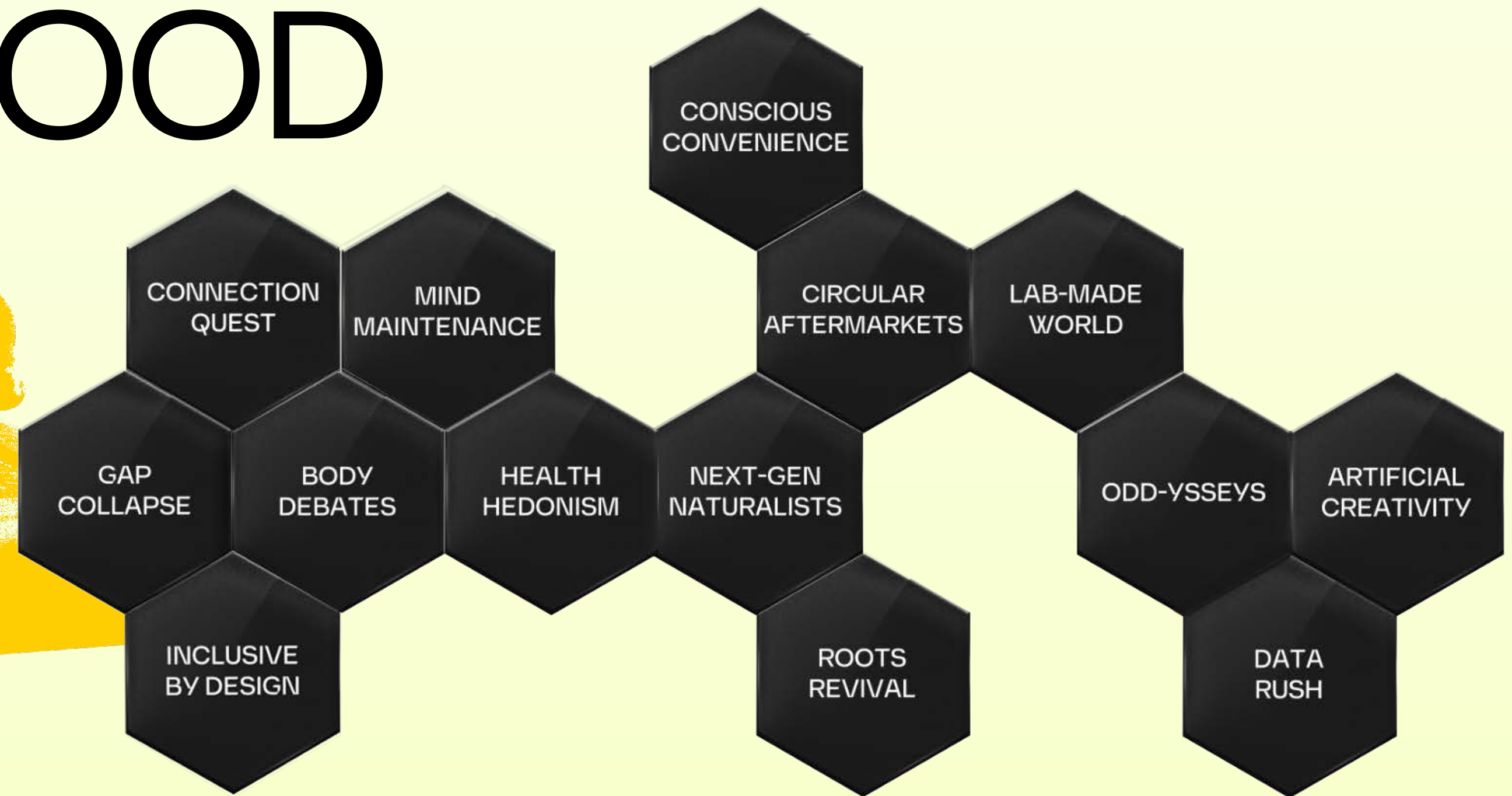
The following report leverages cultural intelligence to unlock four opportunities for disruptive growth in food. Opportunities that don't just impact how a brand communicates, but point to emerging sources of demand. Within each opportunity we've outlined specific ways for businesses to take action — whether that be through product innovation, strategic partnerships, or experience design.

## METHODOLOGY

This report was born from months of in-depth qualitative and quantitative research, strategic ideation, and collaboration among 42 Culture Spotters from 15 global TBWA offices. Our Spotters bring expertise from their work on some of the world's biggest food companies—from McDonald's, to Pladis, to Albert Heijn.

EDGES  
SHAPING  
THE

# FUTURE OF FOOD



Edge / 'ej / noun

A meaningful cultural shift that has the scale and longevity to propel a brand toward a greater share of the future.

See Appendix for complete Edge definitions.

# FOREWORD

Food writing tends to focus on the aesthetics of food: how to make something beautiful and delicious, or how to find the restaurants serving the most fashionable dishes. But that is shifting to meet new realities, emboldened by broader cultural and generational shifts: the global food system accounts for about a third of greenhouse gas emissions, younger people are curious about the cuisines of other cultures, community fridges have changed neighborhood dynamics, and there's a desire to look to food as a source of wellness as well as indulgence. There's a clear desire to balance collective needs and individual desires in a way that serves the majority of people. What's no longer going to suffice is the old ways of sharing how to eat and where to go: That top-down approach has been replaced with a fresh, diverse perspective.

There are many questions being asked about the specifics of that new approach to food: Where are there easy changes to make to daily consumption, how can technology be of use, and in what ways do we need to make big rearrangements in order to ensure climate change mitigation and relieve widespread food insecurity? Is there a way to make supply chains and growing techniques more transparent, to ensure the health benefits of various foods? How can historically marginalized people lead the way in the popularization of their own cuisines?

This hasn't been and won't be an easy transition. What the phrase "future of food" immediately evokes will differ for each reader.

Some will see steaks cultivated in a lab; others will see various Indigenous foods reclaimed and served in a chef's tasting menu; and still others will see community gardening, personalized diets based on blood testing, or carbon emissions percentages on plant-based milk labeling. There is no one-size-fits-all perspective on what is needed to get the global food system in line with climate science, ecological limits, and cultural sensitivity. That's why it's significant to bring every category together into one report, where these ideas can cross-pollinate and be in conversation. What is necessary for a better food future for all is the end of discrete visions and the building of a coalition, all working on different sectors toward an abundant future.

This will require a lot of change, but perhaps the biggest change of all will be that people will have to listen to and work with others they've formerly disagreed deeply with: tech advocates listening to Indigenous farmers protecting biodiversity; policymakers standing up to agribusiness interests that keep meat artificially cheap; and business owners realizing the significance of getting beyond greenwashing slogans to earn people's trust with transparent reports on products' climate impacts. Folks who have historically held the most power in culture will have to take a step back to allow new leadership, ideas, and flavors to take root. These changes are evident even in language, with new words like "regenivore" emerging to explain an approach to diet that prioritizes those companies that are taking part in regenerative agriculture, which puts carbon back into the soil.

When we eat, we are making choices about the kind of world we want to live in and the kind of people we hope to be. There is so much opportunity in this daily, seemingly simple act for connection and discovery. Awareness is moving in the direction of realizing our impact on ingredients, such as in the concept of "food gentrification," where a formerly affordable staple becomes expensive for the community that once relied on it. Culinary visionaries like Ghetto Gastro, Tala Bashi, and Laila Gohar are making new space in art and culture for food—formerly an afterthought resulting in dull passed canapés at openings and events, but now a focal point. These multifaceted approaches to thinking and eating are all part of constructing a better world, through openness and expansive engagement beyond just the restaurant and grocery space.

The future of food can be sustainable, delicious, beautiful, nutritious, and community-oriented. Despite the doom and gloom of headlines, there are changes and innovations afoot that could restructure the food system to be one not of waste nor a leading cause of climate change nor a source of cultural turmoil, but of abundance, sharing, and good health. It will just require a bit of forward-thinking and coalition-building. The future of food is bright, if we build a bridge to get there.

A portrait of Alicia Kennedy, a woman with curly hair, looking slightly to the side. The image is overlaid with a semi-transparent yellow and orange gradient.

Alicia Kennedy

Food & Culture Writer

From the Desk of Alicia Kennedy newsletter / Author of [No Meat Required: The Cultural History & Culinary Future of Plant-Based Eating](#) (Out August 15th, 2023)

# FOOD X CULTURE

## MEDIA

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### Pasta Grannies

Love pasta? Love grannies? Then this YouTube [channel](#) is for you. With over 920k subscribers, Pasta Grannies is giving traditional Italian dishes a new life online.

### Free Rice

Get smarter while making a difference. For every question you answer correctly in this educational trivia [game](#), 10 grains of rice are donated to the UN's World Food Programme.

### Is It Cake?

Inspired by a popular meme, this global Netflix [hit](#) challenges bakers to create the most realistic-looking cakes possible and leaves the audience guessing: "Is It Cake?"

### Cherry Bombe

What started as a quarterly indie magazine celebrating women in food has [turned into](#) multiple podcasts, industry-leading events, and an annual festival.

## LANGUAGE

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### "Mylk"

Say goodbye to milk and hello to "mylk." From oats to pistachios to almonds, regular old cow's milk will no longer cut it.

### "Regenivore"

Being a "climatarian" is so last year. Higher sustainability standards are now shifting our attention to "regenivores": people who only buy from companies that are actively healing the planet.

### "Intuitive Eating"

If you've been on TikTok, you've probably come across [#intuitiveeating](#) (1.7B views). The anti-diet movement is encouraging people to throw out restrictive rules and let their intuition lead.

### "Food Gentrification"

Gentrification is moving from the streets to our plates. [Food gentrification](#) occurs when once affordable and staple food items start trending, erasing their cultural roots and making them less accessible to the people who have traditionally consumed them.

## FASHION

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### Carb Couture

After selling out its viral [BAGuette](#) handbag, Panera has launched a new retail [boutique](#) for carb-inspired swag.

### McFashion

No fast-food restaurant has inspired as many looks as McDonald's. From collabs with Chinese streetwear brand [CLOT](#), to Finnish fashion label [VAIN](#)'s upcycled employee uniforms, there's now a McOutfit for everyone.

### Pasta Puffer

Winter 2023's must-have item? A [jacket](#) devoted to every hot girl's favorite food: bow-tie pasta.

### LV DREAM

Welcome to Paris' most fashionable café and chocolate shop. Created in collaboration with Insta-famous pastry chef Maxime Frédéric, [Louis Vuitton DREAM](#) is a new cultural destination that combines good eats with good-looking gifts and accessories.

## TASTEMAKERS

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### Ghetto Gastro

This [collective](#) of artists and chefs is bringing the flavors of the Bronx to the rest of the world. Their new cookbook, "[Black Power Kitchen](#)," aims to educate people about the rich cultural heritage of beloved dishes from the Black diaspora.

### Tala Bashmi

[Tala](#) is not only putting Bahraini food on the map with her award-winning creations, she's also breaking down gender barriers for the next generation of female chefs in Africa and the Middle East.

### Søren Aagaard

Rather than pairing food and wine, this Danish chef [pairs](#) multimedia art with thematically related food to highlight food's role in culture.

### Laila Gohar

[Gohar](#) is making waves internationally with installations that blend food, design, and fashion into one mode of storytelling. Her frequent collaborators include Prada, Hermès, Comme des Garçons, Simone Rocha, Sotheby's, and more.



# FOUR GROWTH OPPORTUNITIES AT A GLANCE

## 1. FOOD UNDER REVIEW

Food is facing higher stakes than ever before. While solid taste, technique, and presentation may have been the markers of a good meal in the past, urgent social and environmental issues are now requiring us to judge food differently—viewing it not as a standalone industry, but as a key ingredient in the push toward a fairer and more sustainable future. In this new age of scrutiny, no detail is off the table.

PG 7

## 3. FOOD RX

The lines between food and pharma are blurring. While personalized nutrition and stress-reducing diets are elevating food's role in medicine, a growing number of drugs are also changing what and how we eat. As the two overlap, we'll face promising opportunities as well as entirely new dilemmas.

PG 25

## 2. BEYOND CONSUMPTION

Our food system is due for an interactive redesign. After years of chasing convenience in the form of fully stocked supermarkets and ultra-fast meal delivery apps, we're now coming to realize that a hands-off approach to food isn't serving us. To get back on track, brands will need to turn passive consumers into active participants.

PG 16

## 4. TECH'S KITCHEN

Technology's role in food is being elevated. While long-standing cultural narratives have taught us to choose "all-natural" foods in favor of ones tainted by tech, an urgent need for innovation is now flipping the script. As we chase a brighter future, tech won't just be tolerated in the food world—it'll be welcomed in as an essential.

PG 34



# FOOD UNDER REVIEW

Food is facing higher stakes than ever before. While taste, technique, and presentation may have been the markers of a good meal in the past, urgent social and environmental issues are now requiring us to judge food differently—viewing it not as a standalone industry, but as a key ingredient in the push toward a fairer and more sustainable future. In this new age of scrutiny, no detail is off the table.





“Just a few years ago, food was a totally scattered issue. And it was rarely mentioned in climate or health agendas. Now, basically everyone agrees that we need to reboot the food system, and make it fair, healthy, sustainable, efficient, and socially just.”

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**Dr. Gunhild Stordalen,**  
Founder and Executive Chair of  
EAT Foundation



# The search for “good” food is now a search for ethical, sustainable, and inclusive food.



## DRIVING THE SHIFT



### Food is increasingly at odds with climate goals

Climate-heating emissions from food production—dominated by meat, dairy and rice—will by themselves break the key international target of 1.5°C if left unchecked.<sup>1</sup>



### Transparency is becoming a key shopping consideration

Nearly two-thirds of grocery shoppers would switch to brands that disclose more than just ingredient and nutritional information.<sup>2</sup>



### Consumers are looking beyond the label

Almost a third of global consumers (30%) have chosen to boycott a food brand due to its ethical credentials. Workers rights are also a growing priority, with 40% stating that they seek out brands that treat farmers and growers ethically.<sup>3</sup>

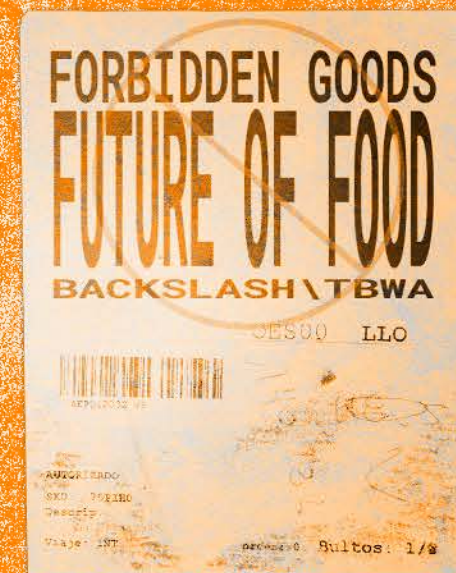


### Representation is under the microscope

Chefs and social media creators are increasingly coming under fire for failing to properly acknowledge the cultural origins of their recipes.

WAY IN 1

# REFRAMING RESTRAINT



“Restraint” has gotten a bad rap over the years. This is especially true in the case of food, where we tend to associate restraint with not-so-fun sacrifices like cutting calories or skipping dessert. But the notion of restraint is undergoing a cultural reframing— untethering itself from diet culture and finding a more positive role in the fight against climate change. In this new take on restraint, we’re cutting back on food waste and cutting out the foods that are bad for our planet.

## Waging war on waste

One way to rethink restraint is through the lens of quantity. Not in terms of how much food we’re consuming as individuals, as is usually the case, but in terms of how much food we’re wasting as a society. For an example of this we can look to China, where household food waste piles higher than in any other country.<sup>4</sup> In an effort to promote more conscious consumption, the government introduced an anti-waste law in 2021 that banned popular binge-eating videos (better known as mukbangs) and allowed restaurants to charge diners an extra fee if they leave excessive amounts of food uneaten. Food service operators can also be fined up to 50,000 yuan for wasting large amounts of food.

Though not yet seen on a global scale, this type of law points to an interesting future where we’re held responsible for what we’re throwing away just as much as what we’re buying. And while reducing waste is only an option for those who have enough food to begin with, enforcing mindful moderation can bring us one step closer to a more equitable and stable food system across the board.

DEFRAMING

## Cutting back on meat

A more ethical take on restraint also means looking at *what* we're eating. And unsurprisingly, when evaluating the environmental footprint of different foods, meat has emerged as public enemy number one. While the move away from meat has been happening for some time now, a more recent wave of public initiatives is now making it mandatory. Take for instance, famous Michelin-starred restaurant [Eleven Park Madison](#), which made the pioneering move to remove all meat dishes from its menus two years ago. We can also look to Cambridge University, which cut emissions by [33%](#) when it stopped serving red meat on campus,<sup>5</sup> and to cities like [Helsinki](#), which pledged to stop serving meat at seminars, staff meetings, and other events going forward.

"We can't tell people there's a climate crisis and encourage them to buy products that are part of the cause."

**Ziggy Klazes,**  
Haarlem  
City Councilor

The meat-free movement will also change how we advertise—with more businesses now rethinking their role in driving up demand for high-carbon foods. On food website [Epicurious](#), for example, you will no longer find any recipes that use red meat. And in the most radical take of all, the Dutch city of Haarlem will become the first city to [ban](#) all meat advertisements from public spaces beginning in 2024. "We can't tell people there's a climate crisis and encourage them to buy products that are part of the cause," says Haarlem city councilor Ziggy Klazes. This logic could easily spread to other cities and brands, meaning there may be fewer ads for burgers and steaks in our future.

## Deforestation bans

This eco-conscious spin on restraint also requires us to reconsider where our food comes from—a detail once commonly overlooked, but that can no longer be ignored. One company leading by example is German discount supermarket Aldi, which recently [announced](#) it would stop selling beef from Brazil in order to "clearly position themselves against deforestation in the Amazon."

Aldi's move may place them one step ahead of the competition for now. Soon though, other companies will have no choice but to follow Aldi's lead. The EU [agreed](#) to ban the import of products linked to deforestation at the end of last year—meaning items like coffee, beef, chocolate, soy, and more will be strictly regulated to ensure that no forests were damaged to create them. While it's previously been up to businesses to take it upon themselves to source responsibly, this landmark law marks the first time that major regulation has been passed to combat deforestation.

## Mindful moderation

From monitoring waste to skipping meat, this cultural reframing of restraint will spur mindful moderation across the board. Moderation not just for the sake of individual health, but for the sake of creating a healthier, well-protected planet for all of us.

### WHAT IF...



Reward programs were based on restraint?  
Allowing people to get more points for buying less meat, skipping plastic bags and single-use cutlery, and avoiding products linked to deforestation.



Health brands shifted their messaging from cutting calories to cutting emissions? Encouraging people to think of "healthy" differently.



Restaurants removed meat from their menus on Mondays? Encouraging customers to go plant-based at least one day a week.



WAY IN 2



# TRANSPARENT LABELING

From misleading information to almost no information at all, food labels have been failing us. But discerning shoppers are demanding better. In a sea of crowded supermarket shelves, brands are now competing to stand out with more informative, ethics-driven labels that help shoppers put their money where their values are.

## The case for carbon labels

While today's food labels are often limited to nutrition facts and ingredients, future labels will care about climate as much as calories. We're already seeing signs of this with the rise of carbon footprint labels that reveal the amount of greenhouse gas emissions linked to a product. And though not entirely new, carbon labeling is still far from standard. Oatly only recently rolled out carbon footprint labels in the U.S. after two years of doing so in Europe, and just a single country in the entire world, Denmark, is currently working on a government-controlled climate label for food.

But do these labels actually make a difference? All signs point to yes. Not only do more than two-thirds of consumers agree that carbon labeling is a good idea,<sup>6</sup> studies also show that carbon labels drive purchases of low-carbon foods.<sup>7</sup> For eco-conscious brands, it's a no brainer. For brands who aren't quite as eager to share their sustainability metrics, this demand for transparency will serve as strong motivation to clean up their act.

# TRANSPARENT

"Consumers are willing to pay a 20% premium for carbon-labeled products."

[Science Direct](#)<sup>8</sup>

## Supply chains take center stage

Though much of the current focus is on carbon, it's important to point out that greenhouse gas emissions are just one piece of a much larger, much more complex pie. Looking even further ahead, consumers will be looking to packaging to provide insight into the ethics of the entire supply chain. And it's already in motion. Netherlands nonprofit [True Price](#) calculates a product's hidden social and environmental costs by evaluating everything from raw materials to labor; emerging startups like [Carbon Maps](#) and [Carbon Cloud](#) are calculating comprehensive eco-scores based on factors like biodiversity impact, water use, and animal welfare; and [Aanika Biosciences](#) has created an invisible, microbial tag that allows businesses and shoppers to trace the source and safety of their produce.

With these new tools rolling out, it's not hard to imagine a future where every single piece of packaging has a QR code that links out to details like how much workers were paid, which pesticides were used, how much waste was generated, and more. But for this information to be actually useful, some major challenges will need to be addressed.

## Seeking standardization

To see true progress, we'll first need to establish a mandatory, standardized labeling system. As it stands now, it's up to individual brands to share their social and environmental impact however they see fit (if at all). And of the select brands that do, they all use different tools and methodologies—making it virtually impossible to compare products apples-to-apples. There also needs to be a clear way to distinguish what's good and bad. One of the most [promising](#) options is the use of a graded system, much like Europe is doing with the [Eco-Score](#). The voluntary front-of-pack label assigns products a color-coded score between A (good) and E (not so good), giving shoppers a quick and easy way to pick out the most planet-friendly foods. Because let's be honest, most consumers have no idea what 3.15 kg of greenhouse-gas emissions actually means, and it shouldn't be their job to figure it out.

## Glass box brands

The rise of transparent labeling is evidence of a much larger truth: processes and numbers that were once kept secret are now a key part of external branding. By putting their ethical credentials front and center, and making them easy to understand, businesses can win the trust and dollars of today's most conscious consumers.

## WHAT IF...



**In the absence of government regulation, competitors took it upon themselves to align on a single labeling system? Allowing consumers to easily cross-compare social and environmental impact.**



**Restaurants and supermarkets refused to serve foods that exceeded a certain carbon footprint? Setting higher standards for themselves rather than putting the onus on consumers.**



**Brands used packaging to openly communicate the steps they're taking to improve? Earning trust by sharing both the good and the work-in-progress.**



WAY IN 3

# TASTE OF HERITAGE



After decades of culinary exclusion and Western hegemony, calls for inclusivity are changing food culture for the better. In this new chapter of representation, we're celebrating the stories behind heritage dishes, diversifying our palates, and most importantly—making sure that everyone has a seat at the table.

## Reviving lost histories

While the culinary world tends to obsess over the new and never-before-seen, the push for a more diverse future is taking us back to the very beginning—to the heritage dishes and flavors that have been either drowned out or totally erased over time. In Lithuania, for example, several chefs are on a mission to revive three generations of gastronomic knowledge that died off when the country was occupied by the Soviet Union from 1940 to 1990. Similarly, in the Americas, more restaurants are reintroducing ancient cuisines as a form of respect for Indigenous culture. Prime examples of this come from Chef Pablo Bonilla in Costa Rica and Chef Rodolfo Guzmán in Chile, both of whom are setting out to honor their lost histories. "The Spanish came to Chile 500 years ago and we pretended to be Europeans, and, until the 1990s, we pretended to be Americans. Now it's changing because we do have culture, we have Mapuche blood, and we have unique ingredients," says Guzmán.

These more traditional dining concepts coincide with a growing desire to reconnect with our roots through food. Pinterest data confirms this, showing a 200% increase in searches for traditional Russian food, a 150% increase in searches for traditional South African recipes, and a 100% increase in searches for traditional Arabic food last year.<sup>9</sup>

# TASTE OF HERITAGE

"For four in five Gen Zers, dining is an opportunity to explore and connect with cultures from around the world."

Sodexo<sup>10</sup>

## Enrichment vs. exploitation

With this new appetite will come opportunities for new cookbooks, food festivals, and cooking classes that offer a taste of heritage. But before brands rush in to capitalize on the multicultural food boom, it's important that they check themselves. Are they including and elevating the communities they're taking inspiration from? Or are they exploiting them? Take Australia's growing bush food industry as an example. Despite the recent uptick in demand for native foods like wattle seeds and lemon myrtle, research has shown that only 1% of the industry's produce and dollar value is generated by Indigenous people.<sup>11</sup> This erasure of the Aboriginal community negates the exposure of bush food. Without the people and their culture, what does the food actually stand for?

A similar watch-out applies to the adaptation of traditional recipes. Though it's become standard for chefs to mix and remix classic dishes from a range of cultures, the world is now paying closer attention to how authentically (or inauthentically) it's being done. Look, for instance, to TikTok, where more and more influencers are being called out for "inventing" culturally significant dishes that have been around for decades. One famed chef trying to learn from such past mistakes is Jamie Oliver. After facing backlash for his take on "punchy jerk rice" a few years back, Oliver now employs cultural appropriation specialists to vet his recipes—something we could very well see more of going forward. Imagine, for example, if every food brand employed a panel of diverse experts to ensure that histories and traditions were being properly represented.

## Putting people first

These tensions underscore several larger and even more complex questions. If food is a cultural artifact passed down over time, who owns a recipe? As our world globalizes and cultures mix, where do we draw the line between enrichment and appropriation? How do we make room for originality and creativity while also respecting tradition? Though there are no easy answers to such questions, we can start by always honoring, involving, and crediting the people and cultures that came before us.

For grocery stores, this might mean reevaluating where you're sourcing food from and who's benefiting. For packaged foods, it could require a thorough audit of your messaging and brand partners. Whatever the case, one thing is for sure: inauthentic representation is no longer being tolerated.

## WHAT IF...



**Supermarkets set up distribution and marketing channels to support Indigenous and small-scale growers?**



**Brands took food heritage outside of restaurants and grocery aisles? Integrating with museums, music festivals, and art events to help people see food in a new light.**



**Travel companies connected tourists and locals from different backgrounds? Allowing them to share recipes and swap knowledge about their unique food cultures.**



A blue-tinted photograph of a messy dining table. In the foreground, there is a stack of white plates with a fork and a knife resting on them. In the background, there are more plates, some with food remnants, and a dark-colored bowl. The overall scene suggests a messy or discarded meal.

# BEYOND CONSUMPTION

Our food system is due for an interactive redesign. After years of chasing convenience in the form of fully stocked supermarkets and ultra-fast meal delivery apps, we're now coming to realize that a hands-off approach to food isn't serving us. To get back on track, brands will need to turn passive consumers into active participants.





“For a while, food culture was centered on the finished product (the food itself), and innovation efforts aimed to simplify and hasten the delivery of edible materials. But today, the conversation is broadening to include everything that happens before food becomes food—the way ingredients are grown, sourced, made, processed, cooked and served. Food's *how* is becoming just as important as its *what*.”

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**Agathe Guerrier**, Global Chief Strategy Officer, TBWA\Worldwide



# Moving beyond consumption means appreciating the process as much as the final product.



## DRIVING THE SHIFT



**Shaky supply chains are motivating people to take food production into their own hands**

Produce shortages in the [UK](#), [US](#), and [elsewhere](#) have been linked to a surge in home-growing.



**Less discretionary spending will turn eating out into more of an occasion—driving up demand for unique dining experiences**

Yelp [reported](#) an explosion of new experiential restaurant concepts in 2022, with themed cafe openings up by 75% YoY and supper club openings up by 200%.<sup>12</sup>



**Rising food insecurity is highlighting the need for more equitable distribution models**

[345.2 million](#) people are projected to be food insecure in 2023—more than double the number in 2020.<sup>13</sup>

WAY IN 1

# SELF- SUFFICIENCY SURGE

A survivalist mindset is bringing us back to earth. After experiencing food shortages and price hikes firsthand, a growing number of people are coming to terms with just how fragile our food system really is. Now, in the search for stability, consumers are taking on a new role as producers—getting their hands dirty, growing their own food, and relearning how to live off the land.

This push toward self-sufficiency marks a major pivot from our current era of convenience, where sourcing food has become as simple as heading to the nearest supermarket. And while we've come to expect such ease, the reality is that it's only further disconnecting us from what we eat—making it standard to toss produce, proteins, and pre-made meals into our shopping cart with no knowledge of where they came from or how they got here.

But as individuals shift their focus from simply consuming food to producing it, we can expect to see rising demand for a different kind of experience. One where natural, slow processes are prized over pre-packaged convenience. And where we take personal responsibility for what's on our plate.

Take the recent "egg-flation" crisis as an example. When the avian flu wiped out millions of hens, people didn't just give up on eating eggs. Rather, they took steps to secure their own supply, with hatcheries across the US reporting a huge surge in demand for egg-laying chickens. Rising interest in foraging—the act of sourcing edible plants and berries from the wild—is indicative of a similar DIY, back-to-nature approach.

"Once food shortages and inflation started, it was a no-brainer to start growing my own food. I wanted to rely less on supermarkets."

Steven DeGracia, self-taught herbalist

## Grow-your-own

For city dwellers who don't have easy access to foraging havens or enough outdoor space to raise chickens, another solution is gaining steam. Enter: the grow-your-own movement. Driven by rising fears of food insecurity, people around the world are rewinding the clocks and relearning how to plant fruits and vegetables at home. This is especially prevalent in the UK, where recent produce shortages have led to double-digit increases in sales of vegetable seeds and propagators.

The same trend is unfolding in urban Kenya, though supply shortages aren't the entire reason for the shift. Another motivating factor is the widespread use of dangerous pesticides. "I realised that in the years to come, it's going to be very hard to get clean food in this city," says Nyambura Simiyu, a Nairobi resident who runs a farm in the backyard of her townhouse.

Meanwhile, over in China, growing produce is as much a necessity as it is a relaxing hobby. A rising number of Shanghai and Beijing residents are renting out small plots of land on the outskirts of the city, where they can take pride in the entire process—from sowing vegetable seeds, to watering them, to eventually harvesting the fruits of their labor. For many of these amateur farmers, it's a rewarding way to get back to nature and break free from their urban routines.

## Brands turn teachers

In a future where more people are sourcing their own food, we'll look to brands to do less selling and more educating. For inspiration, look to Australian retailer Woolsworth. After learning that over half of six- to 14-year olds had never visited a farm, Woolsworth relaunched its Fresh Food Kids Discovery Tours as a way to teach the next generation about seeds, plant systems, and the farm-to-table journey.

In a similar vein, we could also see brands foster self-sufficiency by hosting local foraging courses, sharing DIY guides, and offering up the space and tools needed to cultivate your own crops. By becoming teachers, businesses can fill an honorable role that will surely be needed for decades to come.

## WHAT IF...

- **Supermarkets rented out spaces for people to grow their own produce?**
- **Food brands promoted slowness over convenience? Urging people to enjoy the process of gathering and preparing each meal.**
- **Businesses worked with urban planners to co-design more sustainable food systems?**

WAY IN 2

# EXPERIENTIAL INDULGENCE



Fine dining is getting an interactive spin. Where guests used to sit back and relax while the usual formalities played out before them, they're now indulging in the entire experience —taking a more active role as students, chefs, and even secret agents. The most exceptional meal is now the most collaborative one.

Much of this desire for interaction stems from nearly three years of little to no eating out. Bored of takeout food and forgettable meals, people are now hungry for unique experiences that can't be replicated at home. Data from restaurant review hub Yelp supports this trend. A review of popular search terms on the site revealed a spike in searches for "underwater restaurants" and "dinner theaters," which increased by 253% and 109% respectively over the past year.<sup>12</sup>

We're also witnessing a major shift on the restaurant side, where many of the elite but notoriously intense establishments are beginning to fall from grace. The clearest sign of this comes from Noma. Widely considered to be the best restaurant in the world, Noma recently left the culinary world in shock when it announced that it will be closing its doors next year. Noma's creator, René Redzepi, pointed out that the current fine dining model, with its grueling workload and insanely high pressures, had finally reached a breaking point.

With that said, don't be fooled by the headlines proclaiming that Noma's closure marks "the death of fine dining." Fine dining will never truly die, it's simply evolving. And when one very fancy door closes, many more interesting ones open.

# EXPERIENTIAL

"We're now expecting more out of our dining experiences—good food isn't good enough. We want a vibe; we want entertainment; we want to understand deeply where something comes from; we want to participate; we want purpose."

Sue Chan, founder of [Care of Chan](#)

## Down-and-dirty dining

Perhaps the boldest rebranding of "fine dining" comes from the shift toward more primal, down-and-dirty adventures—the exact opposite of what we'd historically consider "luxury." Take Black Tomato's hands-on "[culinary moments](#)" as an example. The high-end travel company is luring in tourists with experiences that take them directly to the source, like spending an afternoon catching, cleaning, and preparing cod on a traditional 40-foot schooner in the Lofoten Islands of Norway. A similar offering comes from a company called [Hunter, Angler, Gardener, Cook](#). The company is run by James Beard award-winning chef Hank Shaw, and offers three-day culinary hunts where attendees learn how to skin, pluck, and prep wild game in rural Oklahoma. Lately, the \$2,000 hunts have been selling out in less than 48 hours—proving the desire for newfound knowledge.

## Eat-ertainment

Not all forms of interactive eating involve skinning rabbits in the middle of nowhere. Unforgettable experiences can also come to life in a richer, less gruesome manner, like through immersive dining concepts that indulge your senses. One example to watch is newly opened restaurant [Jǐng](#) in Hong Kong. Surrounded by 360-degree visuals and sounds that change with each new dish, diners at Jǐng are transported back to ancient China. The eight-course culinary adventure takes inspiration from the Tang Dynasty, the legendary silk road, Chinese poet Li Bai, and more, and is accompanied by detailed narrations—making diners feel as though they're part of a larger story.

Another tactic is to use engagement to create a sense of exclusivity. Take, for instance, a new [NYC speakeasy](#) that requires interested diners to crack a secret code in order to be seated. If you're one of the 14 people to make it in, you'll then have to solve an additional cipher to unlock special beverage pairings.

## A priceless experience

As people brace themselves for continued inflation, they'll be pickier about which restaurants they choose to spend their money on. But it doesn't mean they'll stop dining out altogether. Despite financial difficulties, analytics firm Technomica [expects](#) on-premise dining to continue to bounce back as consumers crave in-person experiences. Restaurant occasions are also likely to remain popular due to the fact that grocery prices are [rising](#) higher than dining costs. So while people may be eating out less frequently, they'll be looking to make the most of each visit—offering all the more reason for brands to invest in distinctive, priceless experiences.

"There's a quest for interaction. People are willing to spend, but they are going to be looking for the value proposition of the experience. Engagement is the catchword."

**Andrew Freeman,**  
Founder of [af&co.](#)  
and [Carbonate](#)

## WHAT IF...

- Restaurants hosted a "choose your own adventure" meal? **Where diners became characters in a story and every decision they made determined what they ate next.**
- Food delivery companies offered surprise "experience packages" to elevate your at-home meal? **Providing table decor, interactive game ideas, music pairings, and more.**
- Outdoor restaurants had space for guests to forage their own food? **Then taught them how to make a one-of-a-kind dish using the ingredients they gathered.**



WAY IN 3

# COMMUNITY TABLE



The fight for food equity is bringing neighbors back together. Realizing the urgent need for action, people are breaking free from their silos and stepping up to feed those in need—spurring a more community-oriented approach to food in the process.

Over the past several years, it can be argued that the communal element of food has been somewhat lost. More people are living alone and therefore eating alone; there's a wider gap between where the elite eat vs. where everyone does; and meals with strangers are few and far between. But what if local grassroots initiatives could break us out of our silos while also feeding people in need? Though certainly not a cure-all solution for global hunger (or loneliness), such models could serve as a necessary step in the right direction. After all, studies show that when we eat together, we boost our social, physical, and mental health<sup>15</sup>—all of which are key ingredients to happier individuals and more resilient communities. When we feed each other, we nourish our world.

"Building community resilience using food is a critical part of the puzzle to end hunger and eradicate poverty. Food is a powerful tool for social change."

Food Ethics Council

# COMMUNITY TABLE

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## Fighting inflation, together

Making this future a reality will require everyone to take responsibility for feeding their community. And as we learned during the pandemic, nothing inspires action like tough times. When Covid turned the world upside down, community kitchens began popping up everywhere from [Sri Lanka](#), to [Argentina](#), to [Philadelphia](#)—serving up thousands of free meals for the most vulnerable. Now, with inflation at record-high levels for several countries, a similar response is needed.

Humble restaurant owners across the UK are already leading by example. Last December, for instance, England's Brickyard Bakery [opened up](#) its ovens to those who couldn't afford to bake their holiday desserts at home—ensuring that high energy bills didn't interfere with holiday baking traditions. Similarly, a local Manchester pub called Eccles began [offering](#) free or pay-what-you-can Sunday Roasts. "Our pub is very much at the heart of the community. We just want to make sure we can help people as they make their way through such difficult times," said the pub's owner.

If all businesses demonstrated this same level of empathy, we could see positive ripple effects extend across entire nations. But even if brands don't intervene, people have proven their resourcefulness time and time again. For proof we can look to Nigeria, where residents are fighting inflation by forming [WhatsApp groups](#) that source food items in bulk directly from producers, then share the products among themselves. The result? Up to 22% savings on groceries and countless new connections made along the way.

## Community gardens

Outside of restaurants and supermarkets, another hopeful solution is taking off: the rise of [community gardens](#). These agricultural havens are as unique as the cities they reside in. Some are run solo, some are backed by government funding, but all play a vital role in making fresh produce more accessible. An especially notable project is underway in Brazil, where the [world's largest](#) urban garden will benefit up to 100,000 families every month once completed. The local gardeners will also be compensated for their work, offering a welcome source of income for disadvantaged families in the area.

While the food itself is a vital resource, perhaps equally important is the fact that these gardens are giving neighbors a place to convene and work toward a common goal, all while making a tangible difference.

## Looking backward to go forward

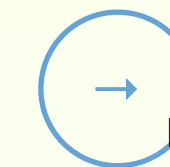
In some sense, these "new" initiatives mark a return to how things used to be. A time when communities were built around mealtime, when food was a shared resource rather than a commodity, and when neighbors looked after one another. Across England, volunteers are even [resurrecting](#) the ancient practice of gleaning—where surplus crops are harvested from farms and redistributed to local food banks and community kitchens.

Whether by supporting these existing efforts or spearheading new ones, the call to action for brands is clear: facilitate connection while fighting hunger in your community.

## WHAT IF...



**Supermarkets hosted community meals made from products that were about to expire? Feeding people in need while eliminating food waste.**



**Restaurants opened up their kitchen to the community one night a week? Giving locals a place to gather and cook food together.**



**Food brands pooled their resources to set up urban gardens all around the world? Transforming food deserts into [edible cities](#).**







# FOOD RX

The lines between food and pharma are blurring. While personalized nutrition and stress-reducing diets are elevating food's role in medicine, a growing number of drugs are also changing what and how we eat. As the two overlap, we'll face promising opportunities as well as entirely new dilemmas.





“Precision medicine has totally changed pharma: outcomes are better when our individual differences and genetics determine our therapy. The same principles are now beginning to apply to what we eat, meaning every person may one day gain a truly tailored diet in harmony with their unique biology.”

---

**Andrew Hedley**, Executive Director of Strategy, TBWA\WorldHealth London

# The increasing interplay between diet and medicine is giving food a higher purpose.



## DRIVING THE SHIFT



**Consumer expectations are rising—it's no longer enough for products to be simply "healthy" or "functional"**

Nearly one in five adults name specific health and wellness benefits they want in their products.<sup>16</sup>



**Greater understanding of diet's role in disease is fueling investments in food-as-medicine startups**

Late last year, a new coalition of investors said its members would put \$2.5 billion toward making nutritious food more accessible over the next three years.



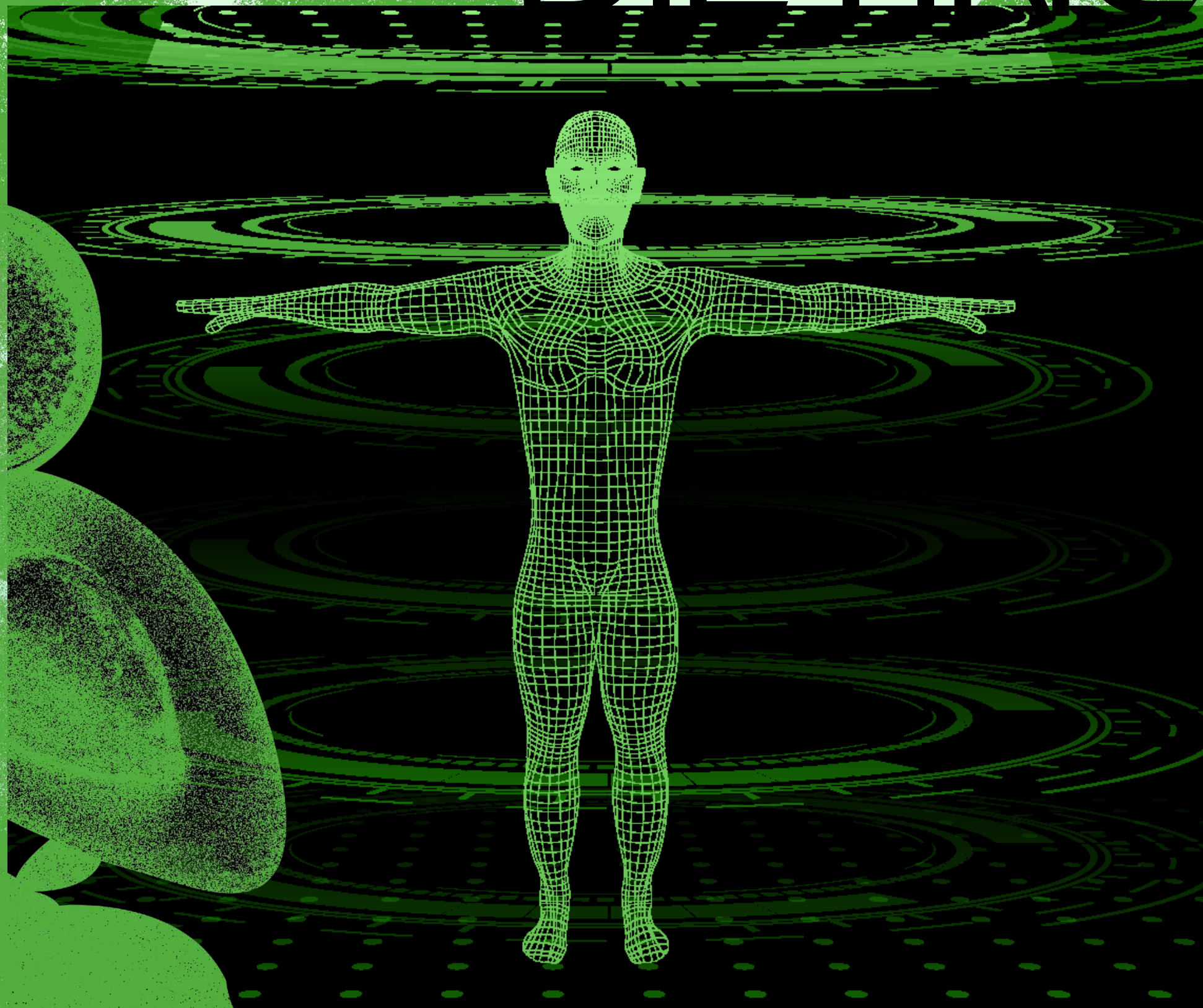
**Corruption among food and pharma companies is increasingly being exposed**

A 2022 analysis revealed that a large U.S. nutrition group and its foundation have a "symbiotic" relationship with the food and pharmaceutical industries — resulting in policy positions that clash with its promise to improve health globally.<sup>17</sup>



WAY IN 1

# PRECISION DIETING



Say goodbye to one-size-fits-all diets and hello to the future. The burgeoning field of personalized nutrition is making it possible to craft meal plans and supplements according to our exact biology—meaning healthy eating is about to get a lot more precise for those who can afford it.

With the rise of personalized nutrition, we're finally throwing out binary thinking around "good" foods vs. "bad" ones, and accepting the fact that what works for one person won't necessarily work for the next. This more finely tuned approach will not only challenge broader diet culture, it'll bring a much closer connection between food and data, and much higher expectations of what we eat.

## A higher bar for "health food"

Current approaches to personalized nutrition are as varied as we are. For some emerging players, personalized nutrition means taking the "food as medicine" adage to the next level. [Revero](#) is one of the many new eat-to-heel startups using health data to aid people into remission from chronic illness. Other brands, like [Everlywell](#) and [SimplySensitivity](#), are identifying the foods that make us sick by testing biomarkers in our blood for allergies and sensitivities. Then there's companies like [Lumen](#), which measures people's breath to come up with diets tailored to their unique metabolism. Though the specific promises and testing methods vary, the underlying principle behind all of these companies is that eating foods widely considered to be "healthy" is no longer good enough. In the future, true health food will be optimized just for you.

"The global personalized nutrition market size was \$14.6 billion in 2021, and is projected to reach \$37.3 billion by 2030."

Allied Market Research<sup>18</sup>

## 24/7 Personalization

As more research is validated, we'll see personalized nutrition expand beyond specialized test kits and occasional check-ups. We already have a glimpse into the not-so-distant future with Toto's Wellness Toilet, which can suggest specific recipes based on data gathered from each flush. If Toto detects an unbalanced diet, for instance, it might recommend a salmon and avocado salad for dinner. Similar technology could eventually make its way to other everyday products as well. Imagine a special straw that analyzes your saliva, or a discreet wrist wearable that collects your sweat. With such innovations in place, personalized meal planning could very well become part of daily life.

## 3D-printed meals

Telling people which foods to eat is one thing. But what if there was a way to actually make someone a perfectly customized meal on demand? With the help of 3D printing, that's soon to become a reality. Look, for example, to Top Table's 3D food printing system that whips up personalized nutritional desserts. Or to the US Army, which is already making 3D-printed protein bars tailored to the needs of individual soldiers.

If Lynette Kucsma—founder of 3D food printing company Natural Machines—has it her way, this technology "will become a common household kitchen appliance in 10 to 15 years." Imagine waking up, going on a run, then having your fitness wearable sync with your 3D food printer to whip up a balanced breakfast made specially for you.

## Hyper-personalized dining

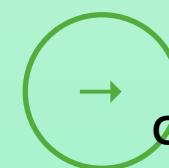
You might be wondering (and rightfully so) how all this customization will affect group meals. After all, picking a restaurant or cooking for friends is already complicated enough when trying to keep up with who eats meat and who doesn't, who's gluten-free, who's allergic to what, and so on. Add personalized nutrition to the mix, and things get even trickier.

One restaurant planning ahead for this kind of future is Tokyo's Sushi Singularity. When guests make a reservation, they must also send in their biological samples via a health test kit. Sushi Singularity then uses their biometric and DNA data to create 3D-printed, hyper-personalized sushi that's customized to each person's unique nutritional needs. Cool? Yes. Extreme? Also yes. But while Sushi Singularity's model may be unfeasible for the majority of restaurants, it raises an interesting question: when everyone follows an individualized diet, how will we enjoy food together?

## Data-driven diets

Although we're still very much in the early stages of understanding the relationship between the human genome and nutrition, it's clear that greater personalization is the future. And in this future, where generic diets are eventually a thing of the past, businesses will be forced to cater less to the masses and more to individuals. We might see cookbooks become apps that tell you what to eat based on your real-time biometrics; and restaurants become food labs that churn out custom-made meals. The more precise, the better.

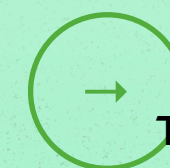
## WHAT IF...



**Grocery stores offered personalized nutrition counseling? Allowing shoppers to get special recommendations and curated shopping lists made just for them.**



**Tech companies allowed for seamless syncing between devices? Making it possible to connect your fitness wearable, smart toilet, and smart refrigerator for optimal meal planning.**



**There was an app that pooled people's personal health data, then came up with recipes that were approved for the whole group? Making sure that personalized nutrition didn't interfere with eating together.**

WAY IN 2

# MIND-GUT CONNECTION

From losing weight to boosting immunity, nutrition has historically been all about improving physical health. But a growing body of research is now confirming the connection between the gut and the brain, giving food an exciting new role in boosting mental well-being.

The rise in brain-gut research comes as mental health continues to decline globally—with nearly one billion people now suffering from some kind of mental disorder.<sup>19</sup> And though food and supplements aren't a cure-all, they could help us eat our way to a happier, more relaxed state of mind. A 2022 study, for instance, found that Brits who consumed more fermented foods and fiber were significantly less stressed after just four weeks.<sup>20</sup> On the flip side, people who consume a high number of ultra-processed foods are more likely to report mild depression or anxiety.<sup>21</sup> Why? The science says that a healthy diet promotes a healthy gut, which communicates with the brain and affects production of feel-good chemicals like serotonin and dopamine. So the better you eat, the better you feel mentally.

"The potential influence of food on happiness and well-being has been virtually ignored."

Redzo Mujcic, PhD and Andrew J.Oswald, DPhil<sup>22</sup>

# MIND-GUT

## Gut-friendly foods

This recent focus on the mind-microbiome connection is fueling interest in gut-friendly foods. One trend on the rise is “[psychobiotic diets](#),” which consist of lots of prebiotic foods (like apples, bananas, cabbage, leeks, and onions) and fermented foods (like sauerkraut, kefir, and kombucha)—both of which can lower stress and improve sleep. Meanwhile, other brands are packing these gut-boosting ingredients into entirely new products. See [MIM](#), the first bread designed to balance the bacteria in your gut, and nutrition brand [Supergut](#), which recently launched its first line of gut-balancing chocolate and strawberry snack bars.

An even more future-forward example comes from at-home microbiome test kits. Thanks to companies like [Ani Biome](#) and [Biomesight](#), you can now get personalized diet and supplement recommendations based on a snapshot of your gut microbiome. Looking even further ahead, you can imagine these services coming with specially tailored meal plans—opening the door for potential partnerships with food brands and supermarkets.

## Nutritional psychiatry

The mind-gut connection is also changing how doctors and therapists treat mental health disorders. A leading psychiatrist behind the movement is Dr. Drew Ramsey, author of “[Eat to Beat Depression and Anxiety](#)” and founder of the [Brain Food Clinic](#) in New York. In his sessions with patients, Dr. Ramsey always starts by asking what they eat, then points them toward gut-friendly foods that may be missing from their diet. Dr. Ramsey has collaborated with high-profile chefs, too, giving rise to special restaurant menus that feature fermented foods and anxiety-reducing ingredients.

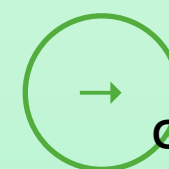
It’s important to note that diet is not a magic panacea for all our woes. Rather, it’s a key addition to the mix of available therapies. As integrative psychiatrist Dr. Uma Naidoo puts it: “In my clinical opinion, all of it helps. You can’t just say, ‘take 10 milligrams of Prozac.’ At the same time, you can’t just say, ‘eat 10 blueberries a day.’”

## A feel-good future

While exciting developments are underway, the reality is that there’s still much more research to be done. And brands are already racing to lead the charge. New Zealand’s dairy farm giant Fonterra and US precision probiotics brand Sun Genomics recently joined forces to conduct [Project Happy](#), a clinical trial testing how specific probiotics can improve self-reported happiness. Similarly, Unilever has [teamed up](#) with biotech company Holobiome to identify food and drink ingredients that could have a positive impact on mental well-being.

As findings from these pilots are rolled out, we’ll see more businesses turn their attention to food’s impact on mental health. Gut-health supplements will be marketed as certified mood-boosters, supermarkets will have dedicated sections for feel-good foods, and brands will seek partnerships with psychiatrists. With [#GutTok](#) amassing nearly one billion views on TikTok, it’s clear that our microbiome obsession isn’t fading anytime soon.

## WHAT IF...



Gut-friendly foods became the new “comfort foods”? Pushing people away from junk food and toward healthier choices that will *actually* make them feel better.



Restaurants teamed up with nutritional psychiatrists to create menus built around mental health?



Rather than offering pricey meal plans, brands promoted mood-boosting recipes that can be made at home and on a budget?



WAY IN 3

# FOOD X PHARMA PARADOX



While “food as medicine” gains traction, another phenomenon is occurring—the introduction of drugs that allow you to continue eating foods you shouldn't. As the relationship between Big Food and Big Pharma is exposed, people will look to businesses to fix the root of their health problems rather than sell them band-aid solutions.

While personalized nutrition companies are helping people identify the foods that don't work for them, pharma companies are posing a radically different question: why change your diet when you can pop a magic pill instead?

The concept of taking medicine to eliminate food's unwanted side-effects is far from new. Just look at how standard it's become to follow up fatty foods with an antacid to relieve heartburn. Or, think of how many people with lactose intolerance rely on Lactaid pills so they can keep eating ice cream to their heart's content. Though seemingly harmless, these over-the-counter solutions are just a small example of how easy it's become to manipulate our diets—for better or worse. And with the rapid rise of drugs like Ozempic, the conversation is taking a serious turn.

**"There is an epidemic of people using drugs to continue eating badly."**

Des Jones, Chief Strategy Officer, Juniper ParkTBWA



## Ozempic steals the cultural spotlight

For anyone who hasn't been exposed to the Ozempic mania over the past several months, it's an injectable drug used to treat diabetes that has more recently gained popularity for its off-label use: extreme weight loss. Talk of the drug has blown up online, fueled by endorsement from celebs like [Elon Musk](#) and [Andy Cohen](#) as well as creators on TikTok, where [#ozempic](#) has amassed over 1.3 billion views. No longer just a medication, Ozempic is a full-blown cultural moment.

Besides exposing the dangers of what happens when a prescription drug becomes "trendy," Ozempic is also changing our entire relationship to food. For one, it's curbing appetites and making food much less appealing for those who are on it. As one person shared of their Ozempic experience, "I'm one of those people who's just, like, not that hungry. And I feel better than everyone." In a standout cover story, [The Cut](#) even went so far as to ask what this means for "Life After Food?"

Secondly, Ozempic and its cousin drugs (Wegovy and Mounjaro) are creating new extremes for what it means to be thin. And with Ozempic ads now [plastered across](#) New York City subway stations (courtesy of telehealth company Ro), the temptation to "get skinny fast" is becoming unescapable.

## Double dealing

In talking about the interplay between food and pharma, it's also worth looking at which companies are funding which solutions. Of course, in the case of Ozempic, patients ultimately eat less—meaning there's not much financial gain to be had for food companies. But that's not always the case. Look, for example, to the many companies selling candy, ice cream and sugary sodas while also investing millions of dollars into diabetes and food allergy solutions. In other words, they're conveniently selling both a problem and a remedy. And it goes both ways. There are also plenty of pharma companies pouring money into unhealthy food giants, which is raising eyebrows from savvy consumers and lawmakers alike.

## Paving an integrated path

As our food and drugs continue to overlap and affect one another, our ways of thinking about nutrition will never be the same. And while we'll always need both food and medicine, the first priority should be consuming healthy foods that nourish our bodies without any side effects. How can medicine enhance the positive effects of food rather than just eliminating the bad? And how can food and pharma companies work together to deliver nutritional benefits as naturally as possible? Looking ahead, higher consumer expectations will require the two industries to deliver the best of both worlds, and do it honestly.

### WHAT IF...



**Food and pharma companies teamed up to make nutritious food more accessible? Combatting health problems the natural way.**



**Social media platforms cracked down on drug endorsements from celebrities and influencers?**



# TECH'S KITCHEN

Technology's role in food is being elevated. While long-standing cultural narratives have taught us to choose "all-natural" foods in favor of ones tainted by tech, an urgent need for innovation is now flipping the script. As we chase a brighter future, tech won't just be tolerated in the food world—it'll be welcomed in as an essential.



“While consumers readily embrace science and technology in numerous parts of their lives, they tend to remain guarded when it comes to their food. They hold idealized nostalgic narratives of food sourced as close to nature as possible and associate technology with processing and adulteration. Fortunately, these tensions are evolving and represent a unique opportunity for the food industry.”

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**Hartman Group,**  
Food & Technology 2023<sup>23</sup>



# Following decades of resistance, technology is finally being eyed as the key to a smarter, less wasteful, and wildly creative future of food.



## DRIVING THE SHIFT

→ **Declining resources and a growing population are exposing the need for a new approach to food production**

Food systems are currently responsible for about 70% of biodiversity loss,<sup>24</sup> and yet we'll need to produce 56% more in order to feed the projected population of 10 billion people by 2050.<sup>25</sup>

→ **People are increasingly optimistic about technology's role in tackling the climate crisis —opening the door for greater acceptance of food tech**

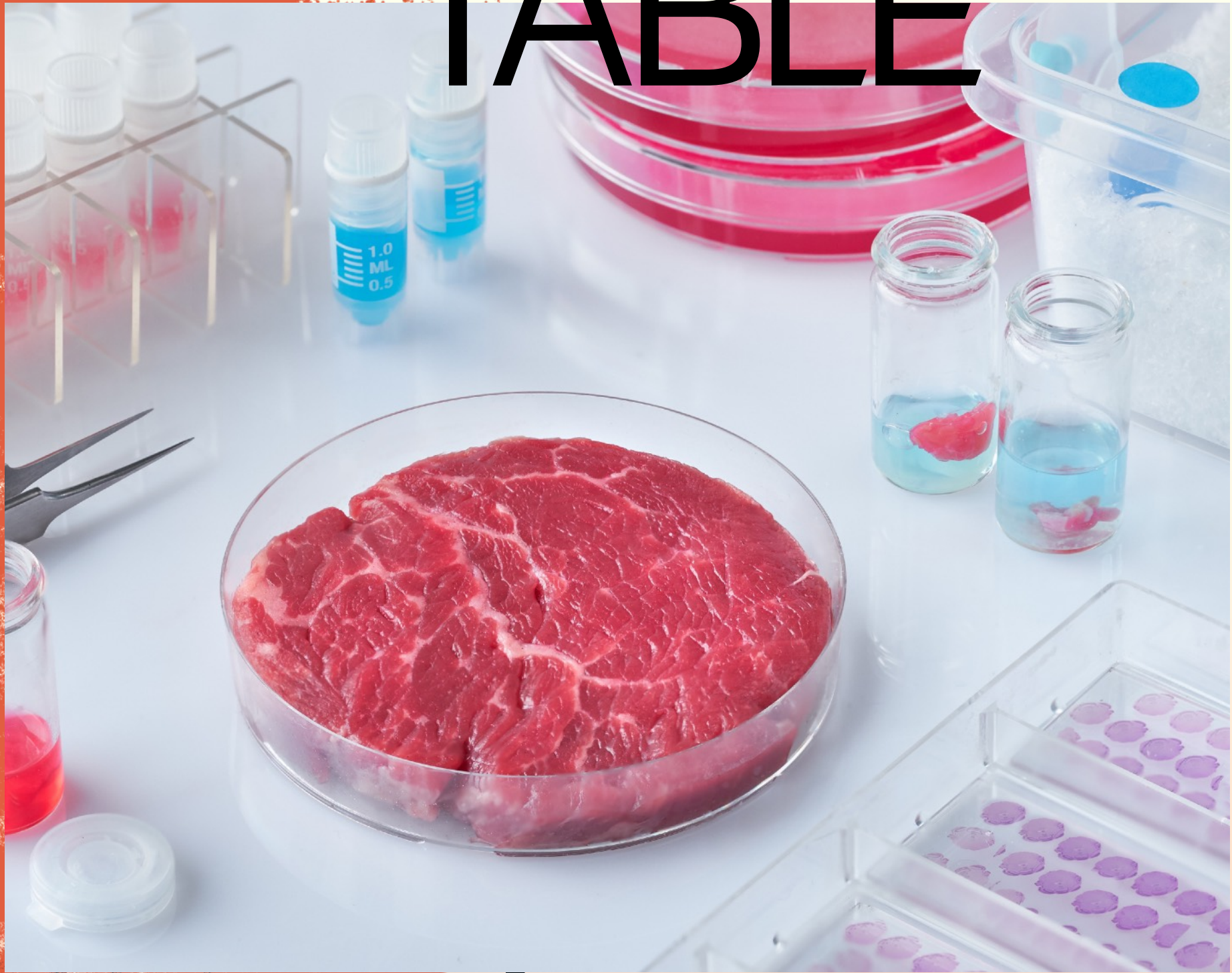
61% of consumers now believe that "science and technology are our best hope to address climate change," up five percentage points from 2019.<sup>26</sup>

→ **Compared to other categories, the public is most enthusiastic about using AI for food-related applications**

According to a 2023 survey, 48% of people would be "very" or "somewhat" interested in AI-generated recipes—the second highest ranking out of 37 different AI products and services. Interest in AI-generated grocery lists (42%) and AI-generated menu recommendations at restaurants (40%) also topped the list.<sup>27</sup>

WAY IN 1

# LAB-TO-TABLE



Food production is moving from the farm to the lab. With our current approach clearly unsustainable, lab-made foods are being positioned as a more humane, future-proof alternative. And while these animal-free products are attracting major attention from investors and governments, they're also generating their fair share of skepticism. Welcome to food's new ethical battleground.

The premise of lab-made meat is this: 100% real meat, without the need to raise or kill livestock—a process that's currently responsible for about 11%-17% of greenhouse gas emissions.<sup>28</sup> These lab-grown proteins are made by taking a small sample of animal stem cells, then replicating those cells in a petri dish until they form muscle fibers that resemble real meat.

## Setting the table for growth

While the market is still in its early stages, governments around the world are banking on lab-made meats as the key to a more ethical and sustainable food system. China included cultivated meat in their Five-Year Agricultural Plan for the first time ever last year. And Singapore—the food tech capital of Asia—is leading the charge as the only country where lab-grown meat products are legally sold to consumers. The US also recently declared lab-grown meat safe to eat, which could open the floodgates to a whole new food market.

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As more governments follow suit, the number of lab-grown meat companies will only multiply. And they're setting their sights way beyond just chicken and steak. French startup [GourmeY](#) is working on lab-grown foie gras, California-based [Wildtype](#) is making lab-made sushi-grade salmon, South Africa's [Mogale Meat Co.](#) is focusing on slaughter-free wildebeest, and Australian company [Vow Foods](#) is betting on cell-cultivated zebra. With such a wide and exotic range of offerings, it's clear that the lab-made food revolution will expand our palates in more ways than one.

**"There are more than 100 companies in the cell-cultivated meat space globally. By 2035, it is estimated that the industry will be worth \$1.99 billion"**

[Business Wire](#)<sup>29</sup>

## Cultivated dairy

While alt. meats have largely stolen the show, the shift to lab-grown doesn't stop there. The dairy industry is ripe for disruption, too, with milk, cheese, yogurt, and even ice cream now being made through precision fermentation—a process whereby sustainable protein ingredients are produced from microbes rather than traditional farms. And with big names like [Nestlé](#) investing in this new technology, we could very well see cultivated dairy products give plant-based alternatives a run for their money.

## Big questions loom

Despite the strong appetite from governments and businesses, consumer tastes may take some time to catch up. For one thing, many people will have a hard time overcoming the "ick factor" that's associated with lab-made meals—something that's not surprising considering how long we've put all-natural foods on a pedestal.

But concerns about taste and texture are far from the industry's biggest challenge. There are much larger ethical debates brewing in the background, including whether or not cultivated meat and dairy products can be considered [kosher and halal](#);

whether they're [vegan-approved](#); and whether the process is actually [greener](#) when you account for the amount of energy required. There's also the very interesting question of how these foods will impact cultural heritage. In Italy, for example, the government is making controversial moves to ban lab-made meat, [citing](#) the need to protect and preserve the country's prized Mediterranean diet.

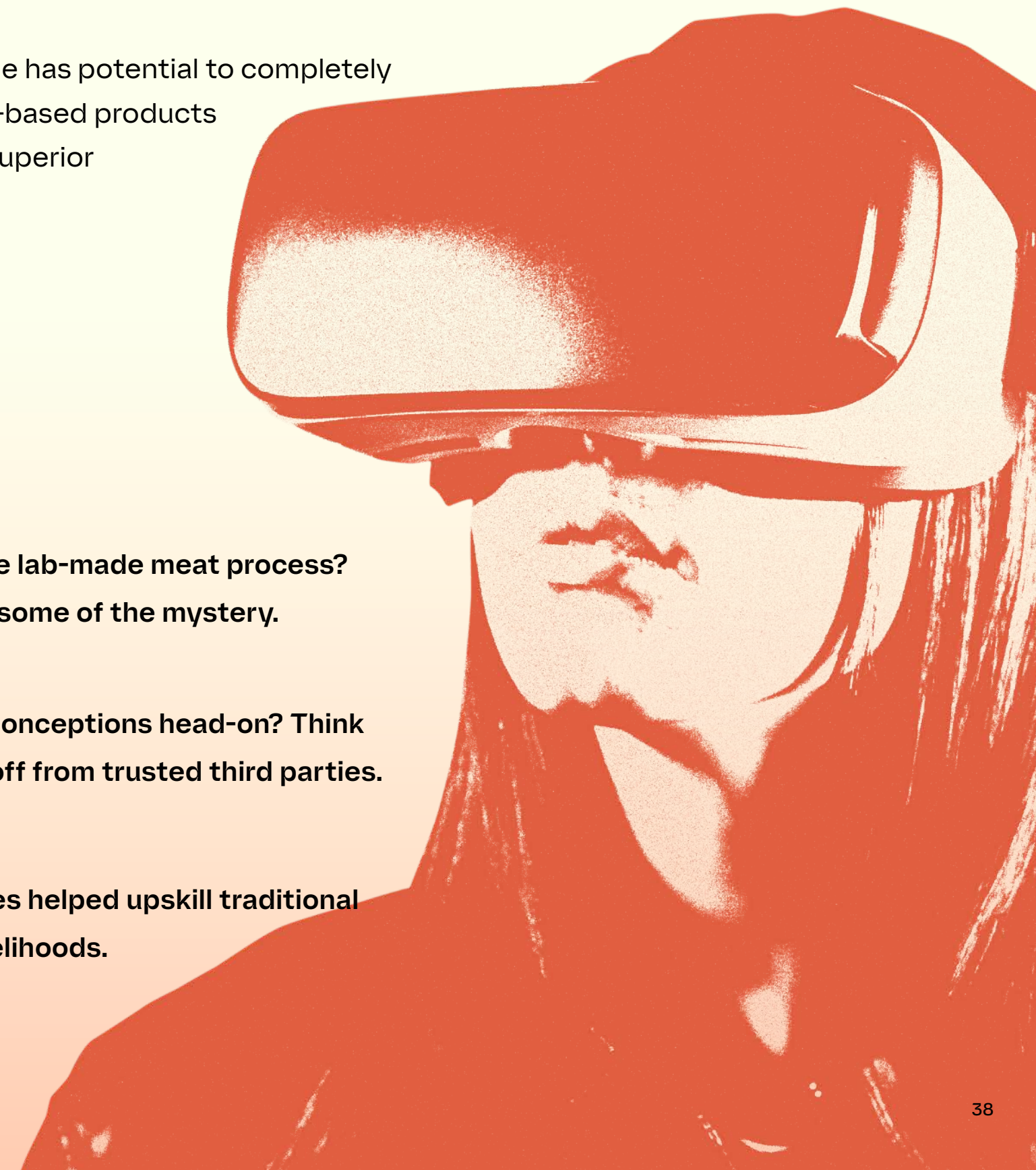
## Investing in education

For businesses aiming to squash the skepticism, investing in education may be their best bet. One recent study found that when provided with a description of precision fermentation, people's likeness to purchase products made through that process increased from [43% to 56%](#).<sup>26</sup> Essentially, the more we know, the less foreign and off-putting these foods seem. That's also why San Francisco lab-made meat startup UPSIDE Foods is offering [public tours](#) of their production facility. "For the first time, delicious and sustainable meat can be produced under one roof, in the middle of an urban community, and in full view of consumers," said CEO and founder Uma Valeti.

Though challenges remain, the shift to lab-made has potential to completely change what we mean by food. And with plant-based products [falling from favor](#), now could be the time for a superior alternative to swoop in. Let the battles begin.

## WHAT IF...

- **Companies used VR to walk people through the lab-made meat process? Increasing consumer acceptance by removing some of the mystery.**
- **Lab-made food companies addressed any misconceptions head-on? Think public lab tours, open Q&A sessions, and sign-off from trusted third parties.**
- **Governments and alternative protein companies helped upskill traditional farmers? Ensuring that they don't lose their livelihoods.**



WAY IN 2



# AI-ENHANCED CULINARY CREATIVITY

AI's influence on food is expanding. No longer limited to robotics and inventory management, new AI programs are taking on roles once thought to be reserved for culinary experts. As tech moves beyond the purely practical, our ideas of creativity, craft, and innovation will be challenged along the way.

When we talk about food, we're talking about so much more: the history, the emotion, the human touch. We romanticize the painstaking attention to detail and the slowness of each step, appreciating a dish even more if it was born from countless prior failed attempts. So when technology starts to interfere with that process, as we've seen with the rapid rise of generative AI tools over the past several months, some questions should be expected. But despite fears that "[AI is coming for your grandma's recipes](#)," that's not exactly the case.

Let's take recipe development as an example. Up until a few months ago, it could be safely assumed that every recipe was dreamt up and perfected by a real person. In fact, it is this very human element that makes recipes so precious to us—whether passed down from a family member or tied to a core memory. So what happens when AI steps in? According to *New York Times* cooking columnists, not much. After challenging ChatGPT to come up with a Thanksgiving menu fit to their personal tastes, the columnists [concluded](#) that while the recipes sounded plausible on paper, the end results lacked some serious soul. One taste-tester even called the AI-generated dishes "the recipe equivalent of hotel room art."

# AI-ENHANCED

## AI-enabled personalization

While AI probably won't replace your aunt's signature dish any time soon, it could still prove useful in other instances, like if you need some initial inspiration or are looking for ideas of what to make with the random ingredients left in your fridge. It might also lead to more personalized recipes and shopping lists. At least, that's the goal of Estonian startup [Yummy](#), which created an AI that develops and adapts recipes based on your unique tastes and dietary restrictions. For example, you could enter a prompt like "I want a varied vegetarian diet that fits my flavor preferences, exercise routine, and budget," and the Yummy platform would spit out a weekly meal plan made just for you, even including AI-generated images of what the dishes might look like.

## Speeding up product development

On the business side, there's also a strong case for using AI to speed up product development—an especially necessary tool considering the pace of today's food trends. A recipe can go viral today and be old news by next week, making traditional research methods much too slow. To help businesses keep up, Tastewise recently launched [TasteGPT](#), a new generative AI tool that analyzes real-time consumption patterns—from best-selling restaurant items to home cooking trends—and helps brands turn those insights into an infinite number of new product ideas.

A similar thing is happening with ingredient discovery. With the help of AI, businesses are now able to uncover natural ingredients and formulations that would otherwise take years to come up with. And nowhere is this more useful than in the case of plant-based products. Take, for instance, Chilean food-tech company NotCo, which uses a [proprietary AI program](#) to come up with plant-based alternatives for animal by-products—like figuring out that pineapple has molecules equivalent to dairy milk. Or, look to Bel Group, which is [leveraging](#) AI to make the next vegan versions of Babybel and Boursin cheese. Through this kind of predictive modeling, the transition to sustainable eats can be made much faster—something our future very well may depend on.

## AI-human partnerships

So, is AI killing culinary creativity? We believe it's quite the contrary. What's more true is that AI is changing the very nature of creativity, taking care of the grunt work so that people and businesses can dream even bigger. In the kitchen of the future, there's plenty of room for both tech-enabled efficiencies and all-natural human craft.

### WHAT IF..

- **Food tech companies called on citizen scientists to help train AI to discover more sustainable ingredients?**
- **Brands highlighted AI fails as a way to show off the care and craft that goes into making their products?**
- **Quick service restaurants ran an AI-generated recipe contest? Inviting people to push the boundaries of AI then giving the wildest creations a spot on their menu.**



## WAY IN 3

# OPTIMIZED WASTE



Technology is unlocking a smarter approach to waste. With about a third of food either lost or discarded each year, tracking and rerouting that surplus has become an industry in and of itself. In the shift toward circularity, we'll see excess food take on a whole new purpose and a much higher importance.

When it comes to waste, technology has unlocked some pretty impressive progress over the years. More grocery stores and restaurants are now using AI to better match supply and demand so that less food is wasted. And we even have dynamic pricing systems that automatically lower the price of supermarket items that are about to expire—giving them a greater chance of making it into someone's cart before being thrown out.

But while these innovations are certainly helping to prevent waste in the first place, the reality is that there will likely always be some surplus food that slips through the cracks—due to the unpredictable nature of the weather, consumer habits, and life in general. "We're always going to end up with surplus somewhere along the supply chain. We can get drastically better, 10x better, in moving that surplus, knowing what condition it is in, to the people who need it," says Emily Ma, head of Google's Food for Good program.

## Surplus for sale

Ma's point about "moving that surplus" is a big one. So much so, that it's fueling an entire industry around redistributing and reselling would-be waste. On the B2B side, companies like [Spoiler Alert](#) are creating advanced systems that allow retailers to identify products that aren't likely to sell and seamlessly move them to other markets or charities. On the consumer side, there are also a growing number of apps that allow people to save unsold foods from becoming trash—and save some money in the process. One global player to watch is [Too Good to Go](#). Through the app, people can browse offers from nearby stores and restaurants that are looking to offload some surplus, then reserve their "surprise bag" of heavily discounted goods for same-day pickup. Too Good to Go saved an impressive [1.13 million](#) meals from the waste bin after just two years of operation in Portugal alone.<sup>30</sup>

What would be even more impressive, though, is if rescuing surplus became the default approach to how we buy food. Imagine, for example, if the biggest food delivery apps automatically notified people when restaurants and stores in their area were selling their leftover goods. Or, if they featured these deals on their homepage rather than in a separate, hard-to-find section. By making waste-prevention the obvious choice, businesses can make a notable impact at scale.

## One company's trash is another company's treasure

If food can't be sold or donated in its current condition, there's another option: turning it into something else entirely. By 2032, the market for global products made from food waste is projected to be worth [\\$83.26 billion USD](#).<sup>31</sup> And with food waste now being turned into everything from shoes, to furniture, to renewable fuel, the potential for B2B partnerships is limitless. As the circular economy continues to take off, technology will play a crucial role in connecting the companies that have food waste with the companies that could make something from it.

## Involving individuals

We also can't forget about all the food that's wasted at home. In fact, this is where the biggest proportion of food ends up in the trash—inspiring smart solutions like [apps](#) that alert you when items are about to expire and [AI-powered compost bins](#) that automatically track your waste for you.

And while these innovations are exciting, they're just the start of a whole new way of thinking about our waste. In the future, people will treat their waste not as trash, but as a valuable resource that's actually worth something. Imagine, for example, if there were local upcycling centers where you could take your food waste and watch it be turned into something new. Or, if grocery stores bought back people's waste and redistributed it to companies that used it in their supply chain. How about an app that made it easy for neighbors to swap unused foods?

Whether donated, traded, or sold, food waste will increasingly be given a second and even third life—and technology will make it possible to do so as efficiently as possible.

## WHAT IF...



**Businesses set up rural farmers with the technology needed to sell their surplus crops?**



**Food delivery apps prioritized the promotion of leftover or soon-to-expire meals? Making this the default option rather than the less convenient choice.**



**Businesses started internally? Using their corporate cafeterias as a testing ground for food waste-reduction ideas.**





# CULTURAL SUBCURRENTS

The road to  
change isn't  
free from  
resistance.

## → FOOD UNDER REVIEW

As more food brands appeal to modern values, some conservatives are accusing companies of going “woke.” Whether it's Chick-fil-A taking heat for pursuing diversity, equity, and inclusion policies, or Cracker Barrel facing blowback for adding vegan sausage to its menus, food's embrace of ethics is exposing much larger cultural tensions.

## → BEYOND CONSUMPTION

Despite the more recent emphasis on growing, preparing, and sharing food, the pure joy of gulping down an indulgent meal lives on. From KFC's ode to the messy joys of eating takeout at home, to Burger King UK providing adult bibs with Uber Eats deliveries of its loaded fries — sloppy, shameless consumption will become an act of rebellion against intentional eating.

## → FOOD RX

While personalized nutrition companies are aiming to make healthy eating as precise as possible, others are opting for a much looser approach. Enter: intuitive eating. Known as the modern anti-diet movement, intuitive eating is about throwing out the rulebook and simply eating whatever feels right in the moment.

## → TECH'S KITCHEN

Not everyone is on board for the food tech revolution. With cultivated foods set to disrupt agriculture as we know it, some governments and organizations are making major moves to protect tradition. Italy's recent ban on lab-made foods is just one example of the fight to preserve cultural heritage, even if it means halting innovation.

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# EDGES SHAPING THE FUTURE OF FOOD

## ARTIFICIAL CREATIVITY

Creativity is undergoing an AI revolution. Giant leaps in the progression and availability of generative AI tools are driving a shift from purely logical, task-oriented applications to more artful, previously impossible outputs. As AI pushes further into creative industries, culture wars around ownership, value, and definitions of “real” creativity will ensue. Say goodbye to the creative process as you know it.

## BODY DEBATES

Our bodies are officially up for discussion. As conversations around reproductive rights, collective well-being, and population planning escalate, once-personal decisions will move to the center of very public debates. It’s individual freedom vs. social responsibility, and everyone wants to have their say in deciding what’s right.

## CIRCULAR AFTERMARKETS

At the intersection of sustainability, scarcity, and hype culture lies a booming aftermarket economy. Old products are being recycled, reused, repaired, and resold, while new products are being created with end-of-life options built in. From modular tech to food waste fashion, the shift to circularity is unlocking ample opportunities for post-sale profits.

## CONNECTION QUEST

We’re simultaneously more connected and more isolated than ever before. With our world no longer built to facilitate face-to-face interactions, businesses are stepping in to fill the void with new social spaces, community concepts, and apps for intentional companionship. The connection economy is booming, and our collective well-being is at stake.

## CONSCIOUS CONVENIENCE

An economy built on “me,” “more,” and “now” is turning a new page. As consumers wake up to the fact that one-click commands come at a cost, they’ll start thinking twice before sacrificing sustainability for speed, or workers’ rights for savings. The convenience economy is growing a conscience.

## DATA RUSH

The days of data free-for-alls are coming to a close. As regulation tightens and power shifts in favor of users, we’ll see the end of vague privacy policies and the start of a more formalized data exchange economy. One where data is assigned an indisputable value. And where users own their data from the start.

## GAP COLLAPSE

The fight against inequality is growing more nuanced. No longer just a wealth gap—the climate gap, health gap, education gap, and digital divide are exposing the very real consequences of rising inequality. And human rights are at stake. In the race to rebalance the scales, unlocking access is the next big market opportunity.

## HEALTH HEDONISM

A once-sterile healthcare industry is taking cues from the pleasurable parts of wellness, ushering in a more holistic and hyper-personalized approach. As wellness fuses with everything from beauty, to entertainment, to fashion, everyday rituals will get a self-care makeover. Who says the journey to better health can’t be enjoyable?

# EDGES SHAPING THE FUTURE OF FOOD

## INCLUSIVE BY DESIGN

Inclusivity isn't a checkbox, it's a form of design thinking. As expectations around inclusivity skyrocket, hyper-critical consumers will sniff out tokenism and expose empty promises. Genuine inclusion requires an entirely new blueprint—building systems, laws, spaces, products, and experiences to be accessible from the bottom up. A fairer future awaits.

## LAB-MADE WORLD

Beef, blood, building materials: the future is being grown in a lab. While "all-natural" was once thought to be better for people and the planet, our current environmental reality calls for a different approach. One that begins with science. As resources run out and supply chains fall under scrutiny, "lab-made" will go from sterile and apologetic to responsible and aspirational.

## MIND MAINTENANCE

Once-invisible mental health struggles are moving center stage. As the taboo is broken, mental healthcare will go from reactive to proactive, from a nice-to-have to a need-to-have. Mind maintenance is our new common priority, and we're practicing it daily.

## NEXT-GEN NATURALISTS

With global upheaval on the horizon, self-sufficiency is survival. The fragility of our planet and the economy is becoming impossible to ignore—forcing us to realize that the systems we've come to depend on are highly vulnerable. Now, with nature as our teacher and ancient practices as our inspiration, we're ditching our destructive ways and placing new value on forgotten skills.

## ODD-VSSEYS

A world exhausted by rationality is finding delight in the discomfort zone. With so few roads left untraveled and questions left unanswered, alternate realities and out-of-this-world adventures will feed our hunger for escapism. It's time to revive our sense of wonder.

## ROOTS REVIVAL

Globalization's fall from grace is allowing us to rediscover our roots. While being worldly was once a point of pride, we're now turning inward and getting in touch with our local and national heritage—gaining newfound appreciation for the people, land, and traditions that came before us. To know who we are, we must first understand our history.

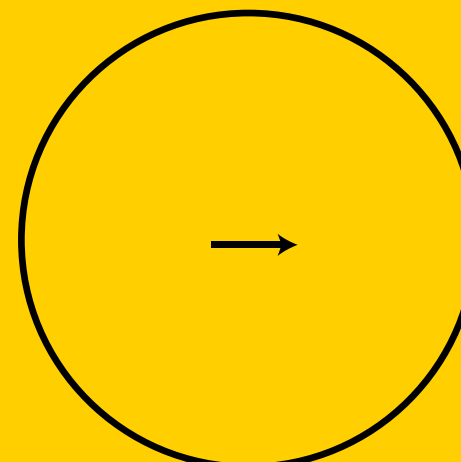
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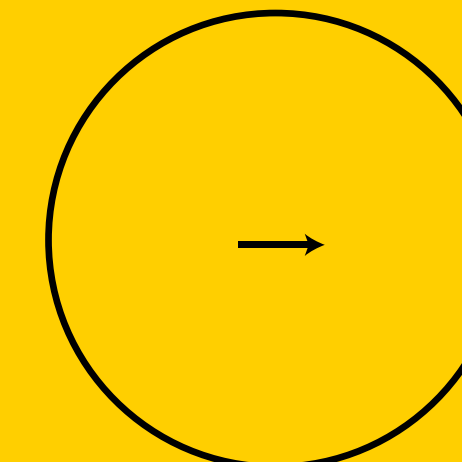
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