



DELPHI STUDY

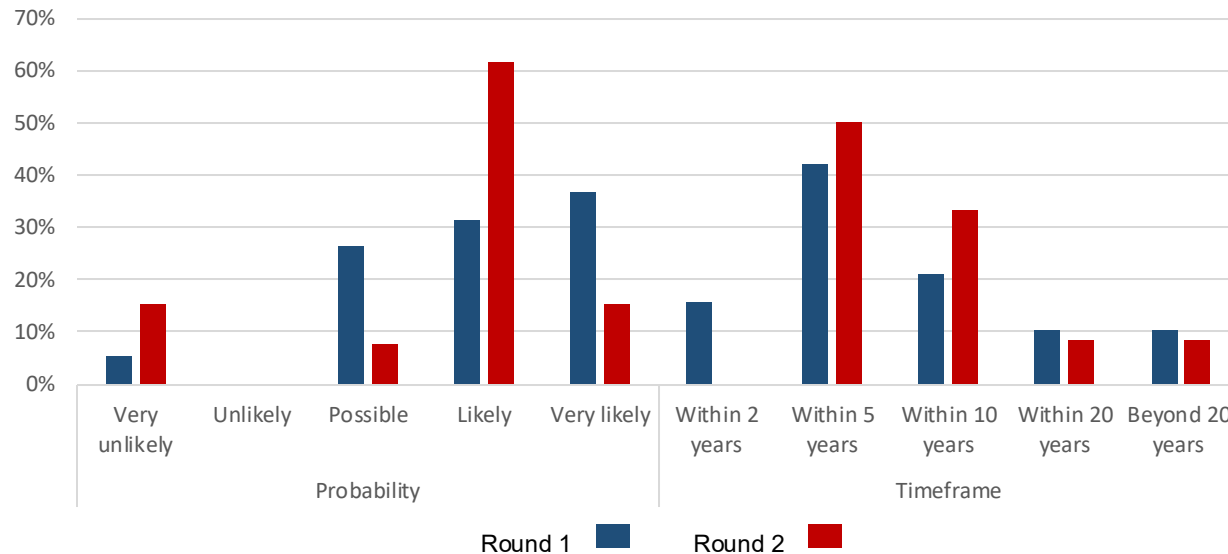
FUTURE OF WELLBEING AND NUTRITION



Make an impact

STATEMENT 1 - STRONG CONSENSUS

Wearable health technology provides real-time dietary and health advice and is (through AI-driven platforms) the main source of consumer nutrition choice.



Dimension	Consensus
Probability (R1)	Likely
Probability (R2)	Likely
Timeframe (R1)	Within 5 years
Timeframe (R2)	Within 5 years

Probability

Very unlikely : “The first part of the sentence is very likely. But it’s the second part that I believe is very unlikely. It may be for a few consumers (those with health issues or an above average in health). For the majority it will not determine the main food choices.”.

Possible : “A small part of the population might already prove this statement to be true. However, for the larger part of the population it is not likely, and price, place and convenience might stay the key criteria in nutrition choices.”

Likely : “The technology is almost there, with a bit more AI and extreme personalization it will be feasible. The Apple watch already brings personalized analysis. Consumers already for a big part consult Yuka or the equivalent to make choices. If the reco. becomes personalized, it will be a simple switch. If the advice given is a brand level and not nutrient level, there can be resistance, hence likely and not more..”

Very Likely : “Wearables technologies are already used for personalized health, and this will only grown. As the devices become more sophisticated, integration of real-time dietary advice is a natural progression in their evolution.”

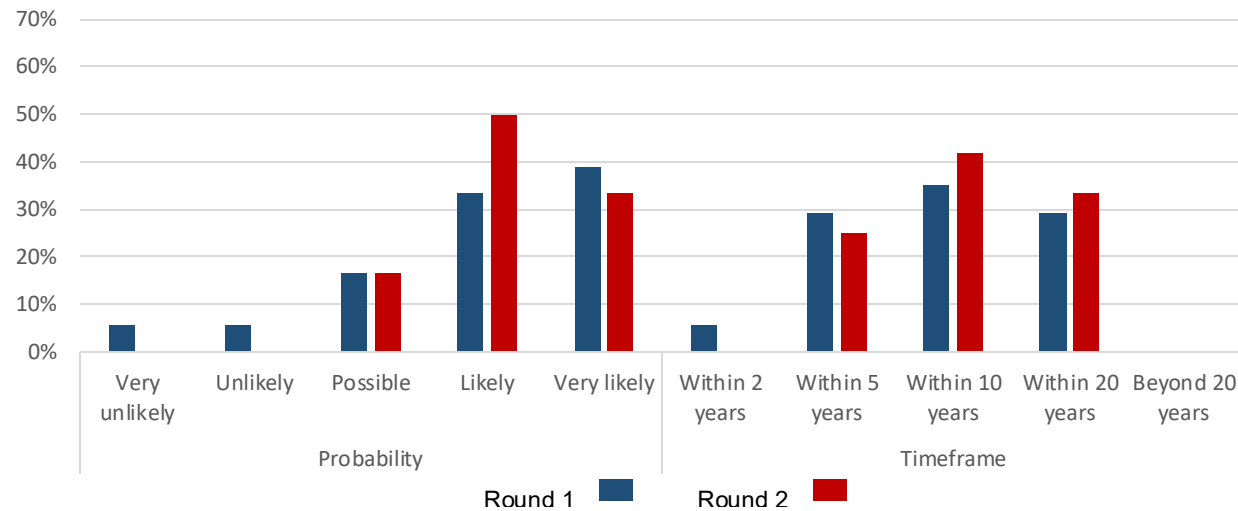
Timeframe

Within 2 years : “I believe for the majority of consumers the choice will be based on price, place and convenience however for the wealth and techy consumers the use of wearable technologies to inform their choices is already possible and will further mature in a short time frame.

Within 10 years : “The technology is there, but consumers are not ready.”.

STATEMENT 2 – STRONG CONSENSUS

95% of all food and beverage products in developed countries are captured by a digital platform that makes nutrition and environmental impact information available to individuals and app developers.



Dimension	Consensus
Probability (R1)	Likely
Probability (R2)	Likely
Timeframe (R1)	Within 10 years
Timeframe (R2)	Within 10 years

Probability

Very unlikely : “The trend for local products and direct from producer sourcing makes it totally unlikely to reach 95%. It would be likely for goods industrially produced. And even then , there would be resistance from industrialists to be so transparent.”

Possible : “Willingness to share real data is not big”.

Likely : “Labelling schemes and transparency laws are already accelerating the availability of nutrition and environmental footprint information. Still 95% might be too high as a threshold to reach.”

Very likely : “These platforms already exist. What needs to happen is that they are connected and made accessible”..

Timeframe

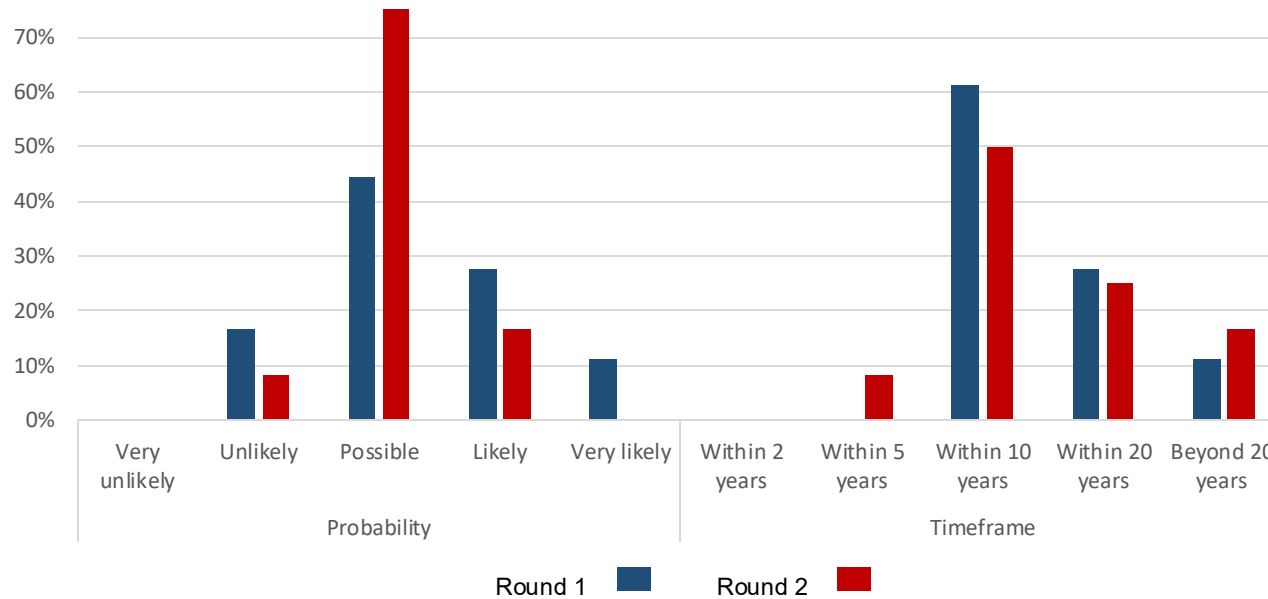
Within 5 years : “Transparency laws and digitalization can make this possible in the next 5 years” or “Policy makers are already pushing towards this.”..

Within 10 years : “Not sure about various stakeholders' interest in this capacity

Within 20 years : “The agreement within the EU on how to measure environmental and nutritional impact may take some time to standardized. Initially, its likely that information will be available for a limited number of products....”

STATEMENT 3 – STRONG CONSENSUS

The global market share of locally sourced food has double compared to 2024, driven by consumer demand for sustainability and traceability.



Dimension	Consensus
Probability (R1)	Possible
Probability (R2)	Possible
Timeframe (R1)	Within 10 years
Timeframe (R2)	Within 10 years

Probability

Unlikely : " Market share for local food can increase, but not driven by consumer demand for sustainability and traceability. We should not overestimate these as a driver for consumer choice. (p.s. please define locally sourced food. Is it my municipality, my country, the EU?)".

Possible : "From various articles on the net it seems the weight of locally sourced food is around 5-8%. Doubling is a big bet. There is a demand and a trend (trust in local production quality, awareness on carbon footprint), but there are also many constraints : low volume per producer, logistics complexity, price. External factors also have a very high influence : global inflation, food scandals, regulations..."

Likely : "The dependence on the global food markets to balance demand and supply of good and bad harvests, and changes in consumer preferences will remain high, but doubling of locally produced food could be possible."

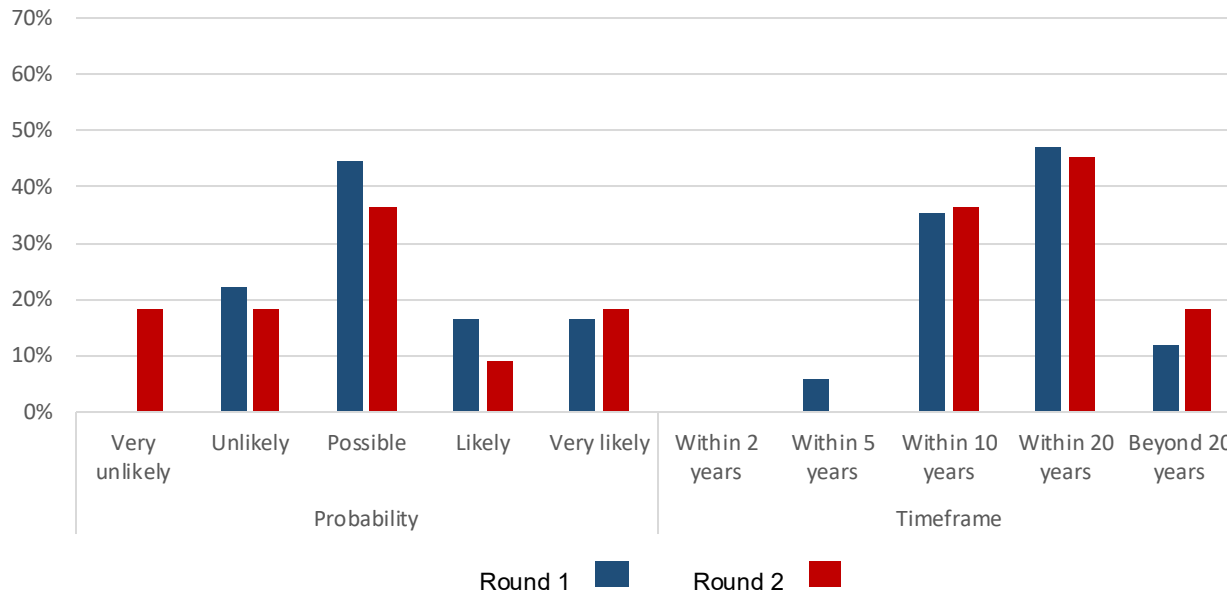
Timeframe

Within 10 years : "Adapting supply chains takes time for retailers and also for food producers, 10y seems possible." or "I think it is more a desire than a real behaviour in consumers".

Within 20 years : "Production capabilities need time to adjust, and behaviors change slowly. EXCEPT if there is a major external factor like Covid coming in".

STATEMENT 4 – STRONG CONSENSUS

Precision agriculture has increased crop yields by 50% compared to 2024, while reducing fresh water and fertilizer use.



Dimension	Consensus
Probability (R1)	Possible
Probability (R2)	Possible
Timeframe (R1)	Within 20 years
Timeframe (R2)	Within 20 years

Probability

Unlikely : “Most production comes from intensive agriculture where crop yields are insanely high at the cost of soil health and high-water use. Precision agriculture will help reduce water and fertilizer use but is unlikely to double yields. More probable in small cultures, so it may also depend on countries.”

Possible : “It will be influenced by many external non-controllable events linked to the climate change.”

Likely : “Who will finance CAPEX and who will own and invoice the output? Or “Yields have been improved already with precision agriculture (some [sources](#) mention 20% improvement since 1980 for wheat) and further improvement will likely be marginal and not even close to 50% improvement without additional factors, such as bioengineered crops.

Very Likely : “Humans will not survive without this capability”.

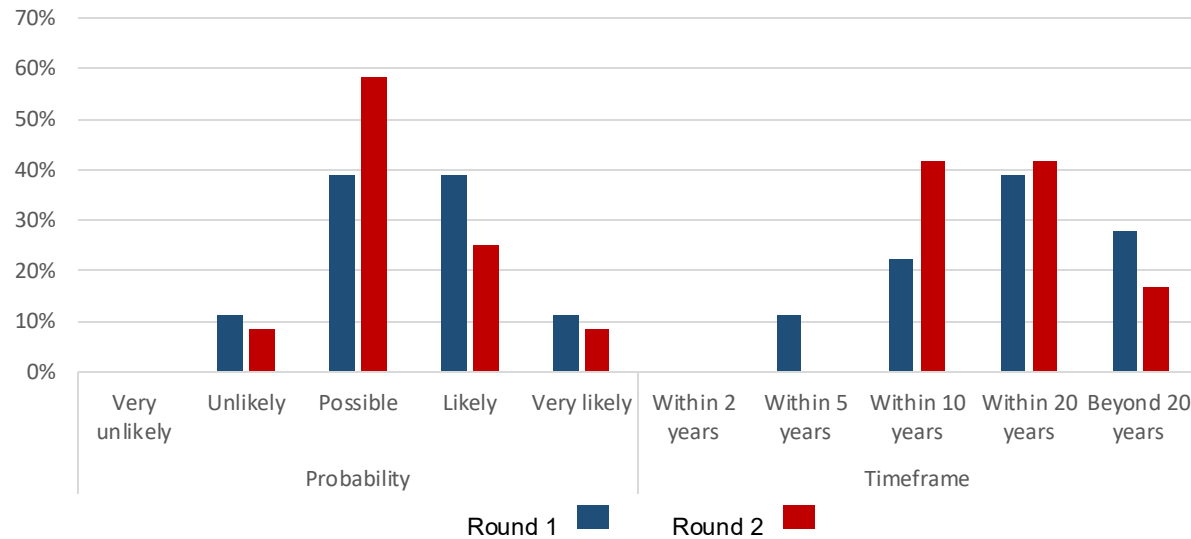
Timeframe

Within 10 years : “I believe within 10 years we have a surplus of energy available, which can be used to grow food in greenhouses in places where we can now not grow food. “ or “Nevertheless, I think its widespread adoption and achieving a 50% increase would take some time.”

Within 20 years : “Agriculture is conservative and takes much time to adapt if at all.” or “ needs time to master the settings, but the AI will certainly help with connected farms” or “From US perspective: requires generational change in farming or significant payback to producer”.

STATEMENT 5 – DISSENSUS ON TIMEFRAME

Insurance companies and national health care systems have applied pressure and introduced support schemes to drive healthy nutrition, reducing food-related health cost by 25% compared to 2024 levels



Dimension	Consensus
Probability (R1)	Tie : Possible/Likely
Probability (R2)	Possible
Timeframe (R1)	Within 20 years
Timeframe (R2)	Tie : Within 10/20 years

Probability

Unlikely : “Maybe in EU and other universal healthcare systems where it is already regulated, but very doubtful in other places where healthcare is a mixed system or no nationwide healthcare system (US particularly in mind)”.

Possible : “The pressure is not in all markets applied. A reduction of health care cost takes time to take effect, and an aging population would also drive the trend to higher health care cost, so the prospect looks optimistic.”

Likely : ” This is the governments objective also, 20-30 years and not easy to put into place (constraints like cost of healthy food, food preferences, food advertisements). And the definition of healthy food which is not easy to define, and experts talk about healthy diet and not food (global vision, diversity, portions size...). But the pression will increase.”

Very Likely : ”Health costs increase and with the aging of the population there is a pressure to increase prevention to reduce them, all the more so as the private sector will gradually take a higher share of health care.”

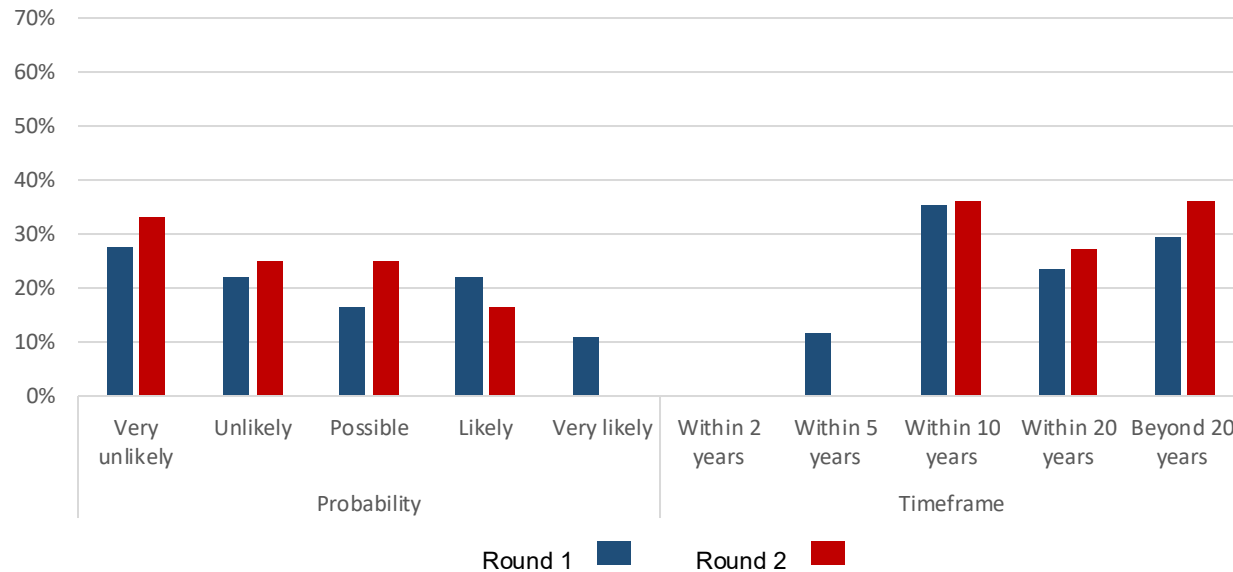
Timeframe

Within 10 years : “In my opinion, achieving a 25% reduction in food-related health costs would be very difficult and would take a while, since it will require systemic changes.” or “Prevention schemes can be implemented quickly. But their full effect will take a while.”

Within 20 years : “Behaviour changes through education (to reach 25%) take a generation.”

STATEMENT 6 – DISSENSUS ON TIMEFRAME

Functional foods catering to specific health conditions make up 50% of the processed food market.



Dimension	Consensus
Probability (R1)	Possible
Probability (R2)	Unlikely
Timeframe (R1)	Within 10 years
Timeframe (R2)	Tie : Within 10 years / Beyond 20 years

Probability

Very unlikely : “50% is way too ambitious.” or “Both functional food and specific health conditions are subjective. My perspective was to perceive specific health conditions as illnesses and functional food as the nutrition with active ingredients helping to alleviate symptoms or the condition itself.”

Unlikely : “Covering 50% of the processed food market is highly ambitious”.

Possible : “That share looks to high to me. That would imply that the market is shifting completely to some form of personalization, which would disrupt the current operating models that are tuned to provide to mass markets.” or “My concern is related to the accessibility, particularly regarding how many people can afford functional foods.”.

Likely : “Though the functional foods market is growing, reaching 50% of the processed food market would be a significant leap, which would likely requiring regulatory changes and substantial shifts in consumer behavior..’

Very Likely : “This is already beginning to happen with the rising use of GLP-1s, at least one monstrous manufacturer is producing foods for that particular target of consumer.”

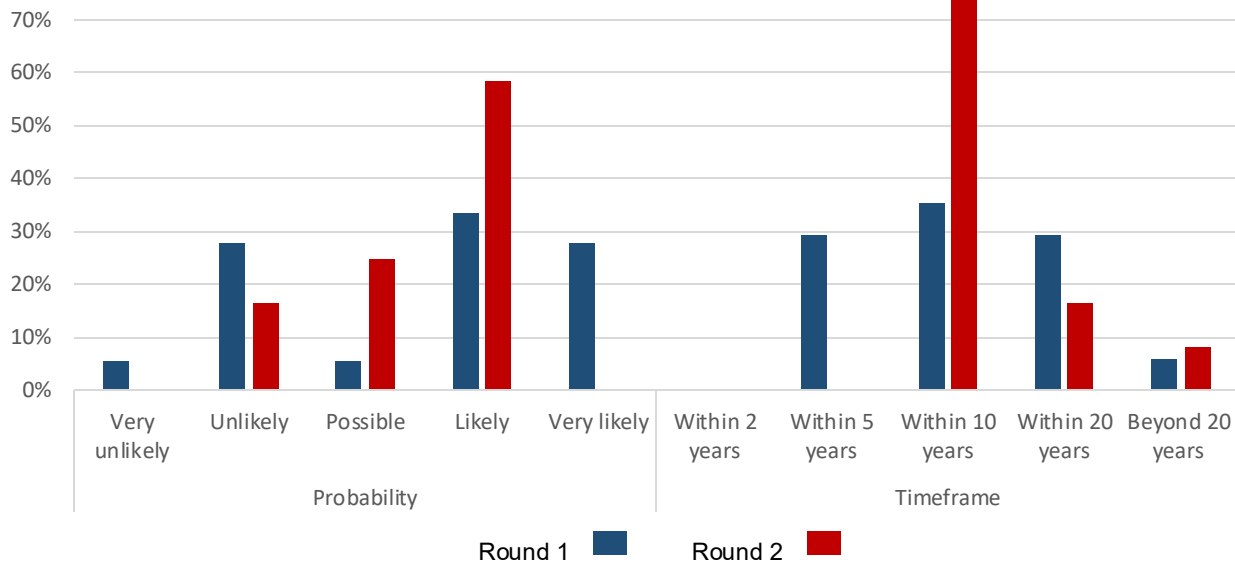
Timeframe

Within 10 years : “Will be developed for certainly health issues but not become personalized until much later”.

Within 20 years : “Achieving 50% would take a very long time”.

STATEMENT 7 – CONSENSUS

The use of blockchain technology to ensure a digital trail and enable food traceability from farm to fork are standard practice for 80% the total market volume.



Dimension	Consensus
Probability (R1)	Tie : Possible/Likely
Probability (R2)	Possible
Timeframe (R1)	Within 10 years
Timeframe (R2)	Within 10 years

Probability

Very unlikely : “It is already some by some but there are many obstacles : the number of intermediaries who need to fill data in (in activities where there is no administrative staff and already too much to be done in this area), the standardization of data, the willingness of consumers to pay extra for this service in the end, which they will not consult nor fully understand. + the 80% target supposes that it covers 100% save local sourcing.

Unlikely : “The technology is available, but deploying it on 80% of all products would be an incredible ambitious objective

Likely : “Blockchain is already used for food traceability in some advanced nations. This will only continue to grow”.

Very Likely : “Is here to stay and consumers can be told a story even though that we are not including digitized quality” or “It is already possible and a requirement for impact measurements”.

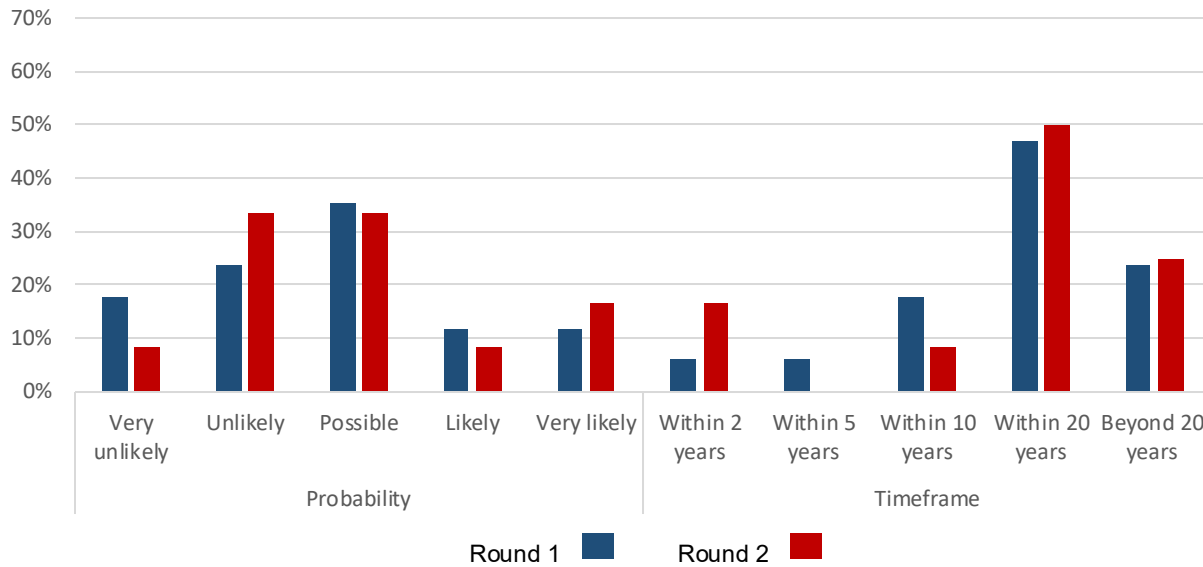
Timeframe

Within 10 years : “Achieving 80% globally is quite ambitious and would take some time, as the technology is still inaccessible to a large number of global population.” or “in the EU - not sure at worldwide”.

Within 20 years : “Business case needs to be proven, technology needs advancement for commodity crops”.

STATEMENT 8 – STRONG CONSENSUS

The global consumption of plant-based meat alternatives has surpassed traditional meat consumption as the primary protein source.



Dimension	Consensus
Probability (R1)	Possible
Probability (R2)	Possible
Timeframe (R1)	Within 20 years
Timeframe (R2)	Within 20 years

Probability

Very Unlikely : “Consumers are willing to try but want foods that are tasty and are conscious that many plant-based alternatives significantly more processed than meat. However, consumers will experiment with plant-based alternatives and even ultimately consume less meat. I suspect it will take quite a bit of time before we reach this point on a global level. See results of our CHL France initiatives with Carrefour and METRO [Source 1](#) and [Source 2](#).”

Unlikely : “In recent report we see that plant-based meat alternatives have a hard time taking off because of taste and cost. To replace meat, plant-based PROTEIN alternatives (like milks) develop better. And vegetarian diets based on lentils, peas and cereals also”. or “This may happen in the developed countries, but the developing countries and much of the global south are adding the use of animal proteins due to the rising income levels.

Possible : “ Plant-based meat alternatives are gaining popularity, but surpassing traditional meat consumption would need to overcome cultural and economic challenges, which is difficult”..

Very Likely : “Here under plant-based I assume current processing technologies and not precision fermentation, that can turn plant-based mass (sugar, starch) to animal proteins..

Timeframe

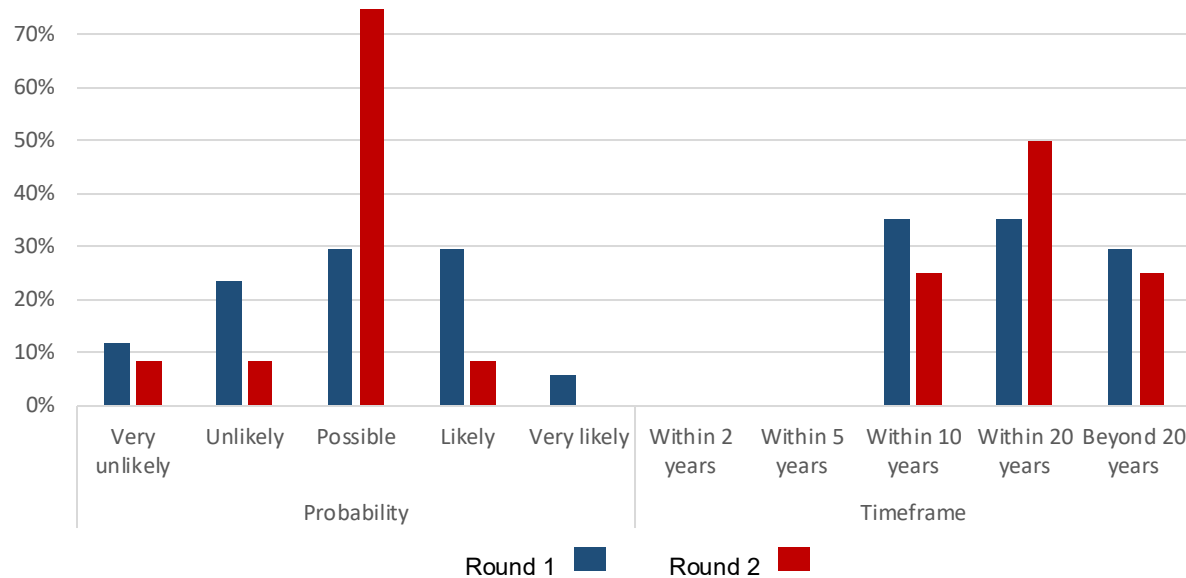
Within 2 years : “Already the case”.

Within 10 years : “The situation is very different between countries.”

Within 20 years : “As surpassing traditional meat consumption globally would require a significant shift; This will likely take a lot of time.”

STATEMENT 9 – CONSENSUS

50% of processed food contains ingredients of novel organism species, such as algae, halophytes, insects and jellyfish.



Dimension	Consensus
Probability (R1)	Possible
Probability (R2)	Possible
Timeframe (R1)	Tie : Within 10 years / Within 20 years
Timeframe (R2)	Within 20 years

Probability

Very Unlikely: “Alternative natural proteins will be beaten by food as a software technologies.”

Possible : “Alternative proteins and novel ingredients are still in development phases, while they could possibly be used for processed food, reaching 50% would require significant efforts and investments..” or “It’s possible, price might be a driver for this. IF this ingredients are cheap and widely available”.

Likely : “There is a proliferation of new ingredients and small quantities could indeed enter the supply chain without much barriers.” or “A lot is done in the Nordic countries. For example, vegetables are included in bread, bakery, etc. However, grasshoppers in bread did not find their buyer and were cancelled.”

Very Likely: “Thousands of new ingredients are coming on the market every year and this is real disruption”.

Timeframe

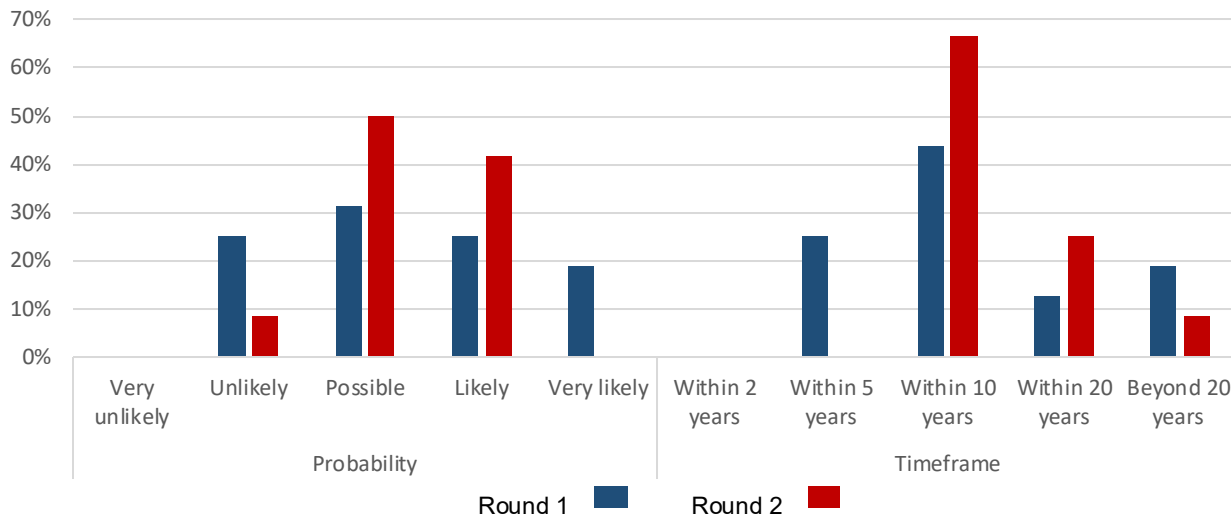
Within 10 years : “It would also take a lot of time for the technology to mature and upscale.” or

Within 10 years : “Scaling ingredients production takes CAPEX and time before prices are coming down. Hope earlier”

Within 10 years : “That could happen relatively quickly, but reformulation of existing products would be slow.”

STATEMENT 10 – STRONG CONSENSUS

Nutraceuticals, blending nutrition and pharmaceuticals to support mental health and well-being, have become a mainstream product category.



Dimension	Consensus
Probability (R1)	Possible
Probability (R2)	Possible
Timeframe (R1)	Within 10 years
Timeframe (R2)	Within 10 years

Probability

Unlikely : “Currently it looks unlikely as there is a lot of pushback from consumers, health professionals, academic studies warning of highly processed food and its negative consequences. But the tide might still shift.”

Possible : “One member built a strategic M&A approach, the portfolio is made up of future-fit brands that leverage the industry movement from pharmaceutical focused to lifestyle-led, science backed brands with devoted communities - 12bn in revenue globally (pg 31 of CGF Preventative Health Playbook). Consumer appetite is there and so is a business case.”

Possible : “Mainstream is subjective, so it is difficult to answer this confidently. But if we understand pharmaceuticals strictly as medicine, then it is quite unlikely nutraceuticals become mainstream any time soon (or at all).”

Likely : “Nutrition and pharmaceuticals are increasingly intersecting, and seeing substantial interest, especially for mental health. This will only continue to grow.”

Timeframe

Within 10 years : “While wide adoption is plausible, this depends on research advancement, which takes some time in the field of pharmaceuticals.” or “It could take up to 10 years for nutraceuticals to become fully mainstream because regulatory approvals and market adaptation”.

Within 20 years : “Development of these products are subject to long term research program”.



Make an impact

