

# Daymon

## INNOVATION REPORT

20<sup>TH</sup> EDITION – PART 2

### **SPECIAL EDITION:**

**THE NEW RULES OF HEALTH –  
PART 2**

*INTRODUCTION TO THE 9 KEY HEALTH  
DRIVERS*

*12 PRODUCT CONCEPTS*

*6 POINT OF SALES AND SHOPPER  
ENGAGEMENT CONCEPTS*



# EDITORIAL

Over the years, there has been a significant shift in the approach to health and wellbeing, moving from a reactive mindset to integrating a proactive and holistic approach. Previously the focus was primarily on treating illnesses and diseases as they occurred, with little emphasis on prevention. However, times are changing with a growing awareness of the importance of preventative care and the impact it can have on future health.

Consumers have different and evolving definitions of what it means to be healthy. Physically (me and my body), mentally (how do I feel) and environmentally (how I interact with my environment). This behavioural shift amongst consumers is driven by nine key drivers outlined in part 2 of the 20th edition of the Innovation Report. If financial uncertainty is still a reality for many, consumers are not pausing their quest for a healthier life, they are looking for affordable solutions. More than a challenge to overcome, this shift represents a major opportunity for the industry to be meaningful to their customers by delivering solutions that answer their needs.

In this edition of the Innovation Report, we explore the evolution of the health topic, and its' influence in this shift, and how the industry can adapt to meet consumer demands. The report is divided in 2 parts – part 1 explored the health topics, part 2 is focused on the 9 key health drivers which are influencing the new rules of health, illustrated with concepts.

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# THE KEY HEALTH DRIVERS

## INTRODUCTION

While our societies are going through challenging times, consumers' quest to live a long and healthy life remains highly relevant. To achieve this goal, the whole spectrum of health should be addressed, from physical, mental and environmental perspectives. For brands and retailers to remain meaningful, both should be aligned with this mindset by offering a comprehensive range of options that address the different dimensions of health. If they succeed in doing so, customers will have an easier time finding solutions that help them maintain a balanced routine and will see these brands and retailers as trusted allies on their personal journey towards their long and healthy life.

While those dimensions are more or less intertwined and can occur in simultaneous moments, the individual attitude toward health can have different temporal approaches. One more proactive and the other more reactive. Whilst the first might include having a balanced diet, a consistent exercise routine or regular health checkups, the latter will simply react to an issue when it has already happened, exposed to multiple degrees of success.

Thus, all those factors combined will significantly shape the way consumers behave and how they make their purchases in the health category.

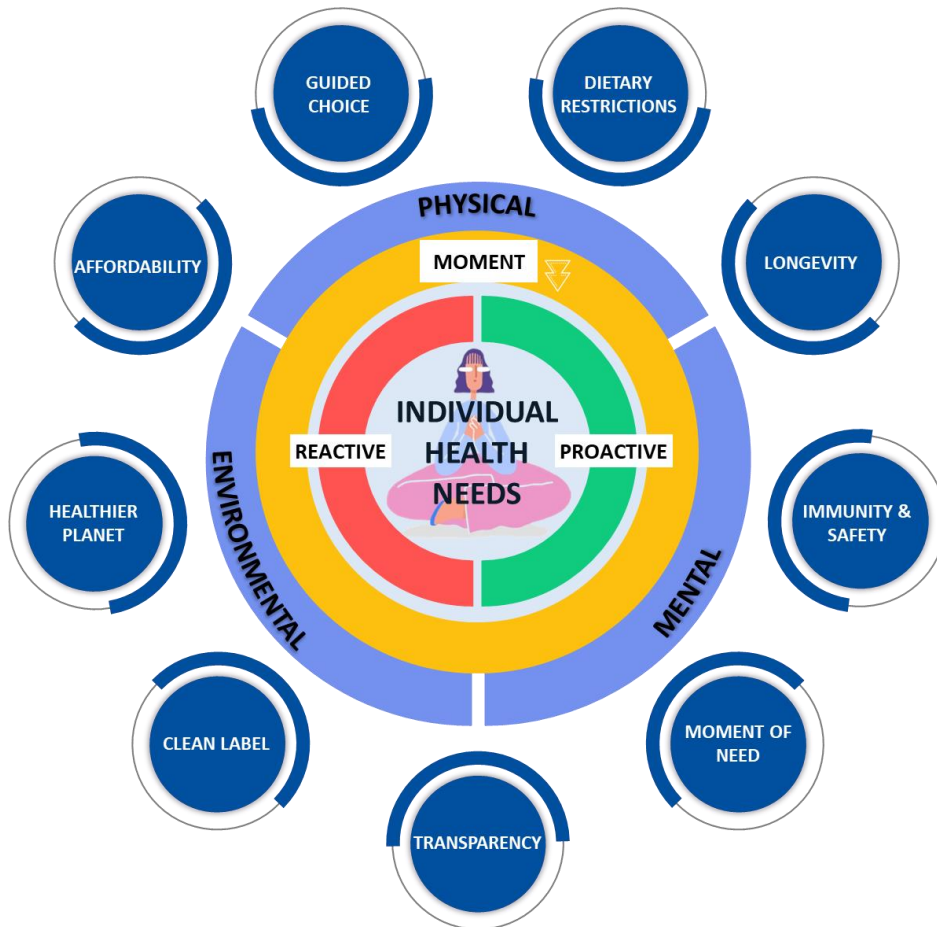


Source: Pexels

# THE KEY HEALTH DRIVERS

## INTRODUCTION

The different layers of health and the health topics (defined in the Innovation Report 20, part 1) are influenced by 9 major drivers, affecting the new rules of health and their implication for retail.



- 1. Dietary Restrictions:** Limitations of what people can eat
- 2. Longevity:** Need for quality of life when ageing
- 3. Immunity & Safety:** Building better health to face the future
- 4. Moment of Need:** Immediate health needs for energy, calming when looking to cope in this fast-paced modern world
- 5. Transparency:** Expectation for brands to participate in individual health journeys through responsible communication
- 6. Clean Label:** Desire for recognizable ingredients and natural less processed foods
- 7. Healthier Planet:** Changes in dietary choices as part of the broader topic of sustainability and consuming in a way that is better for the planet
- 8. Affordability:** In response to the rising cost of living, people are redefining the value of health
- 9. Guided Choice:** Guidance on choosing and preparing foods that best support their health needs

# THE KEY HEALTH DRIVERS

## 1. DIETARY RESTRICTIONS

### *Diets to counter disease*

Dietary patterns have evolved considerably over the last few decades, with globalisation and urbanisation leading to an increase in convenience foods, junk food, and dining out. This has resulted in fewer individuals growing or making their own food. With this global rise in "ultra-processed" foods and drinks, there has been an increase in less desirable nutritional attributes in the diet.

#### WHAT IS A HEALTHY DIET:



According to the WHO, a healthy diet helps to protect against malnutrition in all its forms, as well as noncommunicable diseases (NCDs), including diabetes, heart disease, stroke and cancer.

Thus, what we eat will have a decisive influence on how the body might suffer or not from those conditions and how it will respond to it.

Poor dietary choices such as high intake of processed foods, unhealthy fats, and added sugars can contribute to conditions like elevated blood pressure, elevated blood cholesterol, and insulin resistance. While some consumers take a preemptive approach and avoid specific ingredients to prevent future health issues, others just react to existing health issues when they arise.

The composition of healthy diet will vary depending on individual characteristics (e.g. age, gender, lifestyle, and degree of physical activity), cultural context, locally available foods, and dietary customs. However, its' the basic principles of what constitutes a healthy diet remain the same.

To address the impact of foods on health issues, various measures can be taken. These include reformulating food and drink products to reduce the content of salt, sugar, and unhealthy fats, limiting the marketing and promotion of unhealthy food and drink products, implementing front-of-pack nutrition labels, introducing taxes on sugar-sweetened beverages, providing subsidies for fruits and vegetables to encourage their consumption, and raising awareness of better nutrition through mass media campaigns.

# THE KEY HEALTH DRIVERS

## 1. DIETARY RESTRICTIONS

### Diets to counter disease

An example is the HFSS measures in the UK, which introduced new regulations on the promotion and placement of high fat, salt, and sugar (HFSS) products which came into force in 2022. The regulation targets the promotion of some foods and drinks which are 'less healthy'. As a result, retailers are looking to reformulate products, to ensure regulatory compliance and avoid any curbs on marketing activity.

Within this scope, Tesco has been an active voice on how to improve on their offer's value, health and sustainability factors. Lately, the retailer has been discussing with suppliers on how to make their healthy product category more affordable for customers.

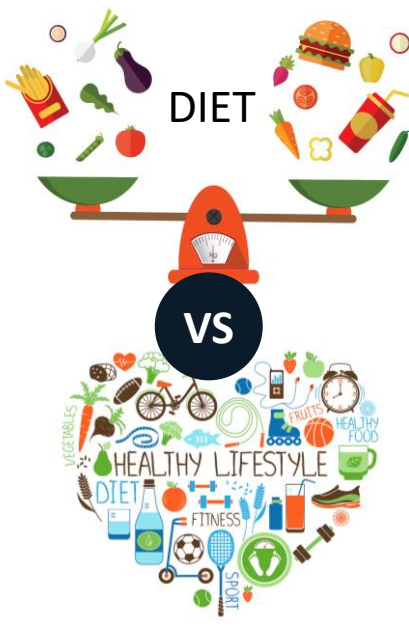


### THE PATH TO HOLISTIC WELLNESS

#### Holistic Wellness Begins with Nutrition: Diet vs Healthy Lifestyle

Diet and healthy lifestyle are often used interchangeably, yet they signify different things. A Diet typically refers to a specific eating plan followed for a particular purpose, such as weight loss, or managing a health condition. On the other hand, a healthy lifestyle encompasses a broader range of choices and habits that promote overall well-being.

At the core of both diet/healthy lifestyle lies the concept of Nutrition. Thus, a balanced Nutrition involves consuming a variety of foods from different food groups in appropriate proportions, ensuring that bodies receive all the nutrients they need to function optimally.



# THE KEY HEALTH DRIVERS

## 1. DIETARY RESTRICTIONS

### Allergens & Intolerances

In recent years, there has been an increase of allergies and food intolerances with more people becoming aware of their impact on health. While well-known allergens like gluten and lactose have established prevention regulations and treatments, it is crucial to keep track of other existing and emerging allergens when developing product formulas. This highlights the need for improved communication and labeling practices to ensure consumers are entirely aware of what they are buying. For instance, the US has passed on the FASTER Act, which has declared sesame a major food allergen. Additionally, as of January 2023, it became mandatory to label on all food products, adding to the existing eight major allergens.

#### WHAT IS THE DIFFERENCE BETWEEN FOOD ALLERGIES AND INTOLERANCES?

##### Food ALLERGIES

**Immune system's** response to a **protein** (recognized as aggressor)

Can be serious, leading to an anaphylactic shock

VS

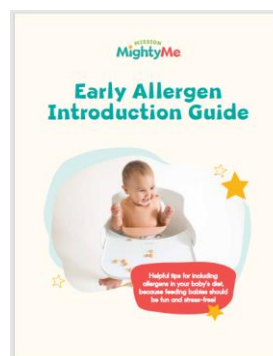
##### Food INTOLERANCES

**Digestive System's** adverse reactions (no immune system reaction)

Body cannot "break" part of the food (sugar, chemical, etc.)  
Abdominal discomfort

By providing comprehensive information about potential allergens, industry players can help consumers make informed choices and avoid products that may cause adverse reactions. This commitment to transparency can foster trust and loyalty among consumers with allergies and intolerances.

**Retail Example:** Mission MightyMe's Peanut Puffs for gradual introduction of food allergens to babies to help prevent allergies later in life. The LEAP Study, the basis for this product development, conducted by Mission MightyMe co-founder and worldwide food allergy prevention specialist Dr. Gideon Lack, demonstrated that most peanut allergies can be prevented if peanut foods are introduced in the first year and consumed consistently until age 5.



# THE KEY HEALTH DRIVERS

## 1. DIETARY RESTRICTIONS

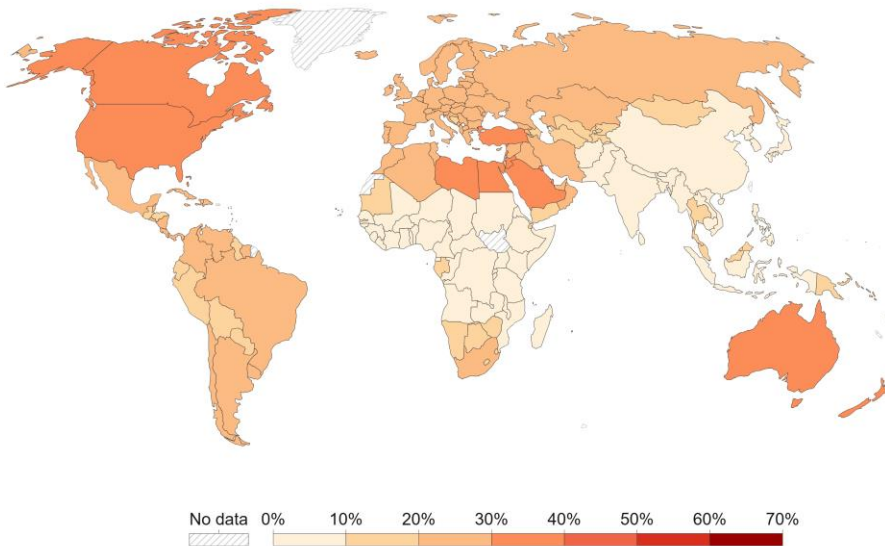
### Obesity/Overweight

Obesity is a global health concern that affects individuals of all ages. Being a disease, it can have a serious impact on health, leading to cardiovascular disease, type 2 diabetes, musculoskeletal diseases, and certain cancers, making it a crucial issue to tackle when it comes to health. The shift in diet culture towards overall well-being has had a significant impact on consumers' approach to weight loss and health maintenance. As a result, rather than focusing solely on weight loss, consumers more and more prioritize a healthy balance of indulgence and nutrition.

The latest global obesity results date from 2016, where countries with Age-standardized prevalence of obesity among adults (18+ years) as a percentage are shown:

#### Share of adults that are obese, 2016

Obesity is defined as having a body-mass index (BMI) equal to, or greater than, 30. BMI is a person's weight (in kilograms) divided by their height (in meters) squared.



**\$4.32 Trillion**

The estimated global economic impact of overweight and obesity in 2035.

**800 million**

People around the world are living with obesity, with a global estimate of **1.9 billion (1 in 4)** people by 2035.

**100% increase**

expected to increase by 100% between 2020 and 2035.

Obesity also impacts children, according to recent studies, the prevalence of obesity and overweight in children has reached alarming levels. 39 million children under the age of 5 were overweight or obese in 2020 and there is expected to be a 100% increase in childhood obesity between 2020 and 2035. These statistics highlight the urgent need to address this issue and implement effective strategies to reverse the trend.

# THE KEY HEALTH DRIVERS

## 2. LONGEVITY

### Generational Needs

The world's population is aging at an unprecedented pace, with the percentage of older individuals not only increasing but also accelerating in most parts of the world. As seen in the Identity microtrend: Diversified Aging, as the world median age of populations continues to increase, a diverse picture of older consumers is emerging. As individuals live longer, the main goal becomes keeping a robust health and the ability to be active and self-sufficient. Personal circumstances, such as a change in health condition, or disruptive societal events such as the covid-19 pandemic, changed people's priorities on those matters and boosted the importance to keep an improved health status when getting older.

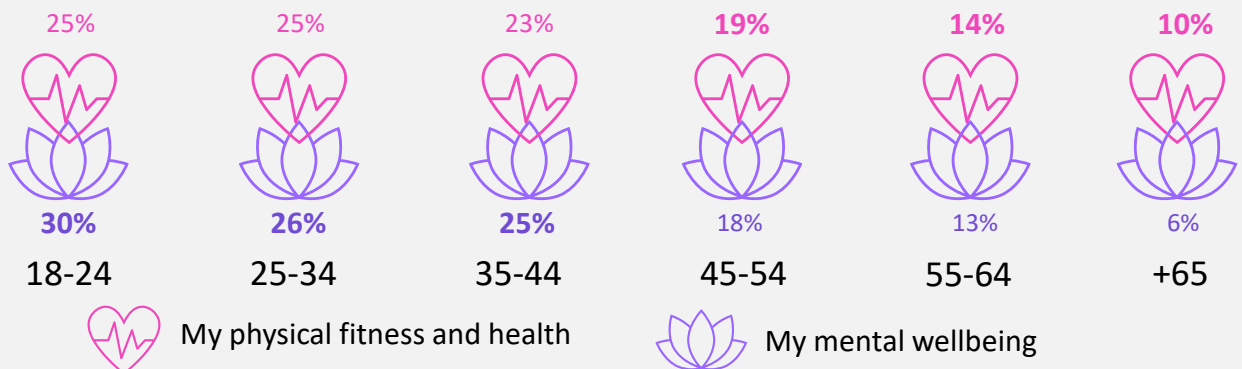


By 2030, **1 in 6** people in the world will be aged 60 years or over.

As a result, health is an important subject for all generations; however, the consequences for each generation differ due to age differences, with concerns such as stress, anxiety, and diet being more prevalent for younger generations, while other health problems such as high blood pressure are more prevalent for older generations. This is illustrated by Hartman research, which highlighted some changing perspectives on what health and wellness mean to them in the last year: Both Gen Z (63%) and Millennials (40%) are more likely to be triggered by stress and anxiety than older generations (28% Gen X and 23% Boomers). Ageing, on the other hand, is the key trigger for both Gen X (60%) and Boomers (90%), as they begin to face greater health challenges and aim for longevity.

#### How concerned are you about the following factors?

##### Extremely concerned



# THE KEY HEALTH DRIVERS

## 2. LONGEVITY

### Personalized Nutrition

The connection between what one consumes and one's health is complex. Everyone needs food to live, but consuming too little, too much, or the incorrect form of food can have negative effects on the body. Consumers tend to seek products/solutions that offer something relevant to them on their individual journey, while keeping overall quality of life as the main goal.

Such products include the increase of protein content, the introduction anti-inflammatory foods or even gut health improvement. Lifestyle eating and exercise plans help to support those individual goals, especially among people who want to feel good and fit and are commonly increasing the consumption of fruits, vegetables and healthy fats while reducing the amounts of processed foods and animal products. Maintaining a healthy diet, an active lifestyle, getting enough rest and making any necessary adjustments are all behaviours that align with the feel good and fit goals. The “B-Well” microtrend, “Evolving diets” illustrates this, where consumers are looking to optimize their diets to meet personalized health, lifestyle, and environmental goals, through specialized diets such as Keto, Paleo or intermittent fasting.

Moreover, this approach also extends to self-care and mental health, with new cutting-edge technology to make informed choices, as explained in the “B-Well” microtrend: “Quantified Health”. Wearable devices, AI technology, apps, and enhanced contactless services such as telehealth are providing elevated expertise and allowing consumers to be more self-sufficient and make informed choices. Artificial intelligence and digital applications further enhance this monitoring process, enabling individuals to understand the impact of their diet on their bodies. Technology has also revolutionized the way nutritionists provide counselling, supporting them with applications and social media handles. In the end, this whole digital transformation empowers consumers to take control of their health.



#### **Experience Example:**

MyFitnessPal is a smartphone app that incorporates gamification aspects to track activity and nutrition. The app includes features such as the option to manually input diet data or scan barcodes.

# THE KEY HEALTH DRIVERS

## 3. IMMUNITY & SAFETY

Consumers are becoming more aware of the impact of infectious illnesses on their health, leading to a greater concern with hygiene, cleanliness, and immunity. This is also reflected by the newly introduced B-Well microtrend Safety and Prevention, which echoes a heightened awareness of the need for personal safety to protect one's immune system and face the future with strength.



of Filipino consumers would like their diet to strengthen their immune system.

The COVID-19 pandemic served as a wake-up call to many, as they reassessed the impact of nutrition on their immune system and their capacity to face future health challenges. Hence, many people are now cutting on carbs, calories, fat, and sugar. In a similar fashion, retailers are acting more on external threats, responding with smarter hygiene, immunity, cleaning, and protection solutions. With a fortified immune system, people will more likely enjoy a longer, improved life.

Among the top Health and Wellness trends, Walgreens team is watching in 2023, keeping immune systems boosted is the first one. "If we can incorporate an immune-boosting ingredient into a traditional medication, supplement or remedy our customers are already taking, we will do it."



### Immunity claims show signs of growth in some categories:

The % of global drinking yogurt and liquid cultured milk sub-category launches with an immune health claim grew from **7%** in 2020 to **11%** in 2022.



# THE KEY HEALTH DRIVERS

## 4. MOMENT OF NEED: PRECISION

A healthy diet is a holistic topic, acting both on a preemptive or reactive level, but also encircling an immediate need, at a specific instant. It can be considered an extension of personalisation, not necessarily in terms of who I am as an individual but of what I need at that precise moment. This makes it more sizeable for the industry and retail than true personalisation and focusing on functional benefits such as Energy Boost, Focus, Calmness, etc.

In the current times of financial instability, people are feeling increasingly uncertain about their future. The ever-increasing cost of living is adding to the stress and anxiety experienced by many. Meanwhile, consumers are struggling to balance their hectic schedules and social lives with their energy and time demands, such as keeping up with social media and the overwhelming amount of information available online.

As the need for the moment becomes more pronounced and precision-driven in our fast-paced world, the need to provide products that offer consumers effective solutions to boost energy, combat stress, enhance mental well-being, and promote restful sleep become more relevant. By tapping into functional foods and drinks opportunities and exploring ingredients such as adaptogenic, and nootropic compounds, brands can offer consumers effective solutions that can support mental health, promote restful sleep and offer energy-boosting appeal. These compounds have the ability to help the body adapt to stressors, reduce anxiety, and enhance cognitive function.

**49%** of Italian consumers say that they are interested in the functional benefits of mental focus while 45% are interested in cognitive health (eg. Memory) from food/drink.

when asked “how do you see your lifestyle evolving over the next 3 months” **85%** stated that they will be “taking time out to rest and relax”, and **68%** stating that they will be “doing mindfulness activities or meditation”.

**Art & Culture Example:** Pokemon Sleep: Is a smartphone app that rewards you with Pokemon for getting enough sleep. The app works by tracking your sleep patterns and allows you to interact with Snorlax and other Pokemon that have similar sleep styles to you.



# THE KEY HEALTH DRIVERS

## 5. TRANSPARENCY

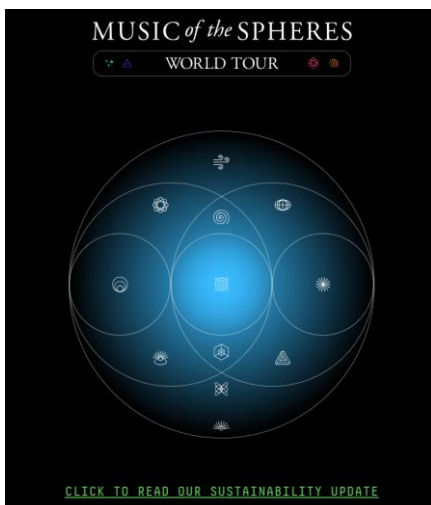
The general trend of consumers' willingness for transparency is impacting how products are communicated. The key here is to find a way to do it transparently, while keeping a clear, understandable tone to explain complex matters. This can be achieved through ingredients and nutrition information, complemented with clear product labels, a well-disclosed product supply chain or the inclusion of specific claims.



of shoppers consider transparency to be important, with transparency defined as providing detailed information such as what is in their food and how it was made.



Additionally, customers are increasingly concerned about the values of the brands they support. They want to align themselves with companies that share common values, something especially relevant among younger generations. The industry needs to tackle those concerns by sharing more about the product beyond what is compulsory, to build trust and loyalty by communicating their values and ethical practices on pack through proven certifications, while reiterating those values online through various communication platforms.



**Art & Culture Example:** Coldplay's Music of the Spheres tour (2022-2024) is raising sustainability standards for touring, promoting climate-change understanding among fans. The band pledged to make the tour climate-positive by combining emissions targets with funding conservation, climate tech, and community projects. A tour website shows radical transparency on sustainability goals and reports and a dedicated app is available to help concertgoers choose low-carbon transport options and rewards sustainable travel.

# THE KEY HEALTH DRIVERS

## 6. CLEAN LABEL

The food industry is constantly evolving to meet the demands and preferences of consumers. As evidenced in the B-Well microtrend De-Junking, as consumers become more informed about the impact of ingredients and production processes on their health, cleaner labels are becoming standard. It is a movement towards cleaner, simpler, and recognizable ingredient lists, a desire for clear and understandable product labels, and a transparent product supply chain, sustainability and specific claims.

People are becoming more conscious of the impact of their food choices on their overall health and are actively seeking out products that align with their goals. As a result, they are concerned about unrecognizable/undesirable ingredients and their presence in the products they buy and consume. Likewise, brands are reformulating product ranges to make products cleaner and are communicating these changes.

**“ In short, clean label is about finding real food ingredients in recipes where you would expect to find those ingredients. ”**

Emma Schofield, Associate Director, Global Food Science, Mintel

**68%**

of global consumers give a high to very high amount of attention to the ingredients used in the food and drinks they consume



**37%**

of global consumers closely read the nutrition labels of food and beverages



**Retail Example:** In the US, Southeastern Grocers has recently launched (July 2023) Know & Love, a range of affordable, clean-label products made with recognizable ingredients for the customer.

The range is planned to cover food & drink and household items and is expected to reach 1.000 SKUs.

# THE KEY HEALTH DRIVERS

## 7. HEALTHIER PLANET

There is a growing awareness that individual actions affect the whole world and vice versa and that these networks are often inherently fragile. As seen by the evolution of the One World trend to encompass the Conscious Consumption microtrend, where environmental worries are often the first step people take when talking about sustainability, this meaning is getting broader as people learn more and become more aware of their impact.

With personal values increasingly influencing purchasing decisions, the health of the planet is no longer just an outside factor but is entering the health spectrum. The notion of better for me and the planet consumption, where both consumers and brands are taking a higher level of responsibility regarding their ethical values, can be directly linked with health, and the lifestyle diets that have emerged.



79% of global consumers, when thinking about health, they think about community livability.

**“ The greatest threat to our planet is the belief that someone else will save it. ”**

Robert Swan  
Explorer

Thus, today's consumers are seeking to optimize their diets to meet personalized health, lifestyle, and environmental goals without sacrificing taste or quality to do so. They are achieving this through plant-centric, flexitarian, or vegetarian lifestyles and retailers are addressing this rapidly growing consumer demand through new assortments, lifestyle brands, and innovations.

Veganism and plant-based diets are becoming more popular as consumers look for ways to eat less animal-based products and have a less harmful impact on the environment. Recently, with a more nutritious and functional approach than before, these product solutions are seen as the fastest actionable ways to transform our food systems and to bend the curve on nature impacts in the aim to restore our planet. Such ways include the support of sustainable food systems, reduce greenhouse gas emissions, conserve water resources, and promote biodiversity.

# THE KEY HEALTH DRIVERS

## 7. HEALTHIER PLANET

### *Lifestyle Diets: Eco diets*

The concept behind Eco-friendly diets is that an individual's health is interlinked with the health of the planet. These diets are built around the idea of environmentally conscious consumption and aim to promote a more sustainable food system that supports the environment.

**Eating Climatarian:** Low carbon consumption where consumers look to reduce their burden on the planet but for example, swapping from beef and lamb to pork and poultry in everyday meals, cutting out meat one day a week, eating moderate amounts of sustainable fish, and being more conscious in the reduction of food waste.

**Reductarian:** Reductarianism is the commitment to consume fewer animal products, including but not limited to red meat, poultry, fish, dairy products, and eggs regardless of individual motivations. The diet is not an "all-or-nothing" diet, as it includes vegans, vegetarians, and anybody else who is committed to reducing their animal product consumption.

### *Lifestyle Diets: Plant-based diet*

The number of consumers who are concerned about sustainability and well-informed about the benefits of a plant-based diet has increased significantly. This has resulted in a growing demand for plant-based foods globally. The shift towards plant-based diets is driven by consumers' desire to improve their health and minimize the negative impact on the planet. This diet involves reducing the consumption of animal products rather than purely eliminating them entirely.

Plant-based diets can be a healthy alternative to animal-based diets if they are well-planned and balanced. There are now many plant-based alternatives to animal-based products that offer similar taste and texture. These alternatives are constantly evolving in terms of taste, variety, functionality, nutritional content, and environmental impact.

It is important to understand that just because a product is plant-based, it does not necessarily mean it is classified as "clean label". Many processed plant-based products require long lists of ingredients to meet the taste, texture, and nutritional expectations of mass-market consumers, when compared to more traditional products.



of global consumers, reduce meat consumption to positively impact the environment or lead a more sustainable life.

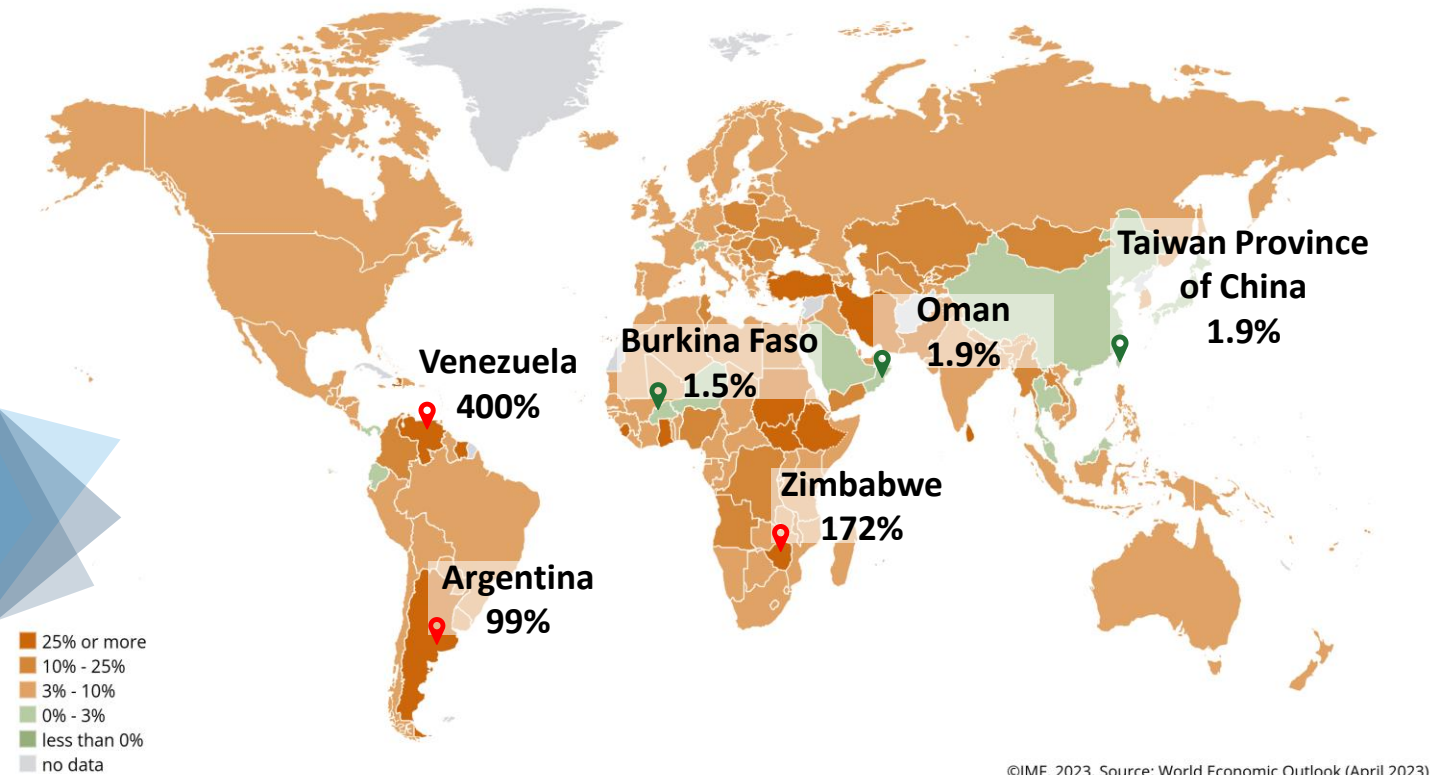
# THE KEY HEALTH DRIVERS

## 8. AFFORDABILITY

As global food prices continue to be a stress focus, due to such factors as geopolitical conflicts, workforce shortages, supply chain disruptions, energy costs, or climate risks, it is becoming increasingly challenging for consumers to afford healthy and nutritious options.

IMF Data Mapper ®

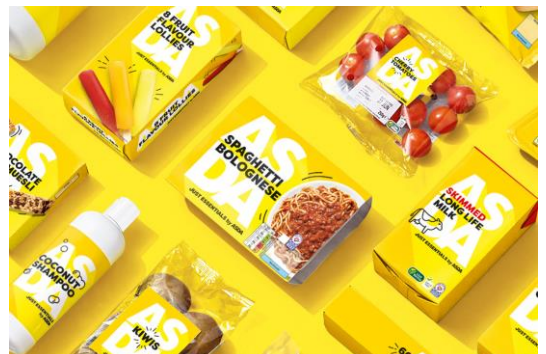
Inflation rate, average consumer prices (Annual percent change, 2023)



©IMF, 2023, Source: World Economic Outlook (April 2023)

According to the World Bank, global food prices have contributed significantly to consumer food inflation in recent years. In 2021 and 2022, food prices added 5 and 6 percentage points to consumer food inflation, respectively. At the start of 2023, it was estimated that food prices accounted for an additional 2 percentage points of inflation. This inflationary pressure makes it even more challenging for individuals and families to afford essential food items.

**Private Brand Example:** Asda in the UK launched 'Just Essentials' Private Brand collection as a reboot of its former 'Smart Price' range. It offers affordable food essentials for customers on a budget. The range is twice as large and includes healthy, nutritious food. Customers can browse recipes and add ingredients to their basket online and follow 'Good Living' instructional methods.



# THE KEY HEALTH DRIVERS

## 8. AFFORDABILITY

In the face of the cost-of-living crisis, consumers are reevaluating their priorities and redefining the concept of value when it comes to health. While price remains a primary concern, health and sustainability are also at the forefront of consumers' minds. People want to make informed choices that not only fit their budget but also support their overall well-being and the health of the planet. As a result, there is a need to find innovative and cost-conscious solutions to ensure that everyone can access and afford these essential food items.

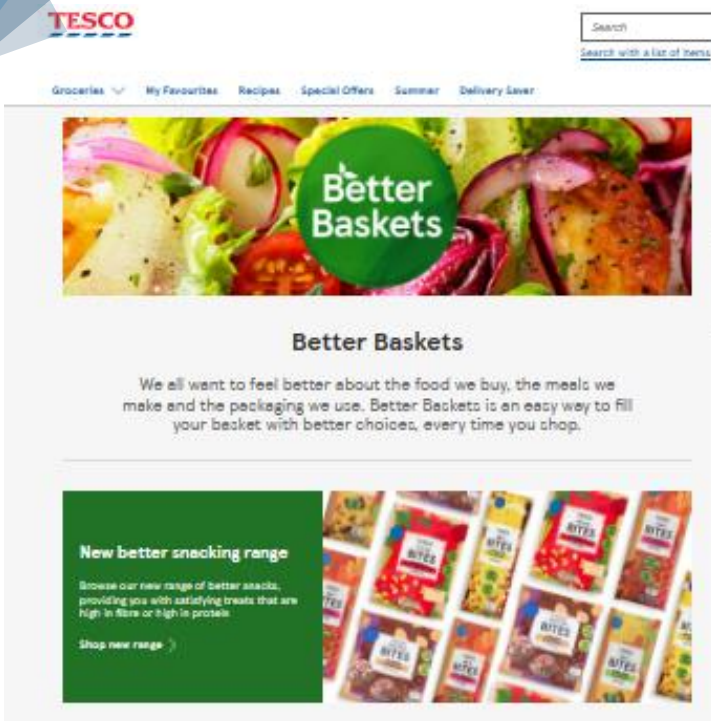
**54%**

of global consumers say that the impact of inflation on their household budget is extremely concerning, while **35%** were quite concerned



### Retail Example:

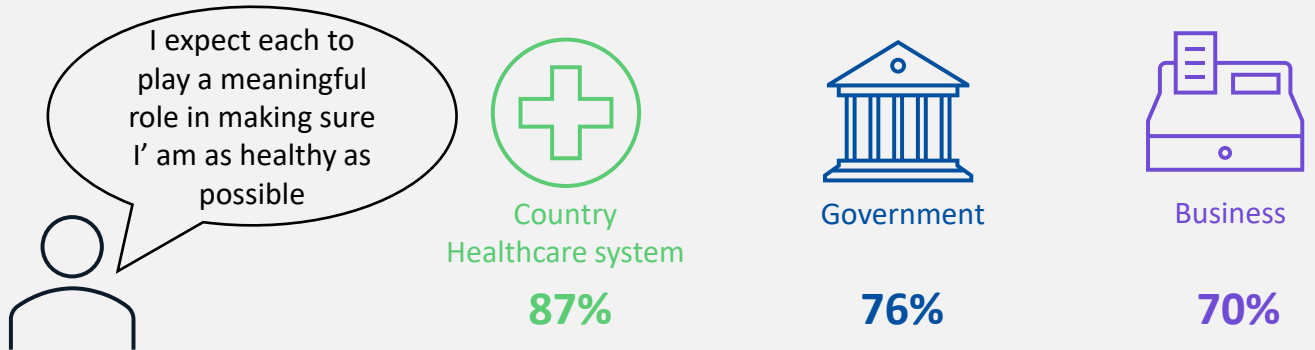
Tesco UK, for example, has launched a new **Better Baskets campaign** to assist consumers in shopping for a healthier and more sustainable basket **without sacrificing price**. Tesco's goal is to boost the percentage of healthy items sold to 65% by 2025.



# THE KEY HEALTH DRIVERS

## 9. GUIDED CHOICE

In such a complex era, consumers need to know how to choose the relevant information they have, in order to make sustained choices. Thus, they are expecting businesses and governments to be more active in influencing their health habits. According to the Edelman Trust Barometer 2023, global consumers are actively seeking out institutions that will play a meaningful role in keeping them healthy.



Beyond institutions, retailers can also adopt the role of health allies by guiding consumers to make better choices, an example being the Waitrose Health and Wellbeing page which offers a dedicated online space for customers to make guided choices.

### Legislation

Legislation plays a crucial role in shaping the health landscape. Governments and regulatory bodies worldwide are implementing policies to promote good health and well-being. These policies often focus on areas such as food labelling, nutritional guidelines, and the reduction of harmful ingredients.

This is reflected in the increasing demand for products that align with these regulations and promote overall well-being.



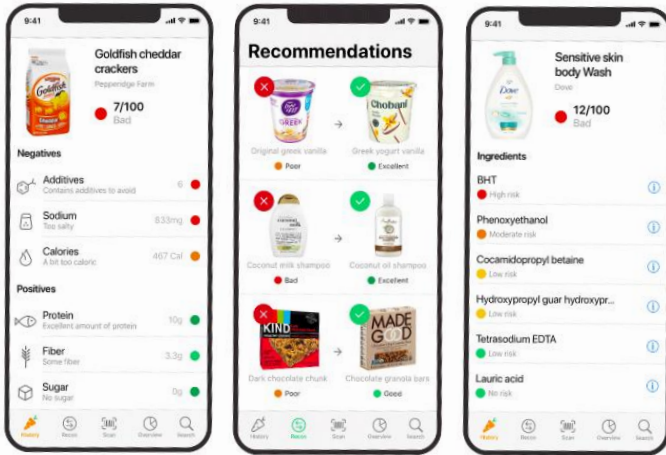
Ireland is leading the Way in Europe with Health Information on Alcohol Labels. This regulation will come into effect in May 2026 and will require information on the label as to the grams of alcohol, calorie content, and associated health risks, such as consumption risks when pregnant, risk of liver disease or cancers as well as a link to the HSE website (Ask About Alcohol) for further guided information for consumers.

# THE KEY HEALTH DRIVERS

## 9. GUIDED CHOICE

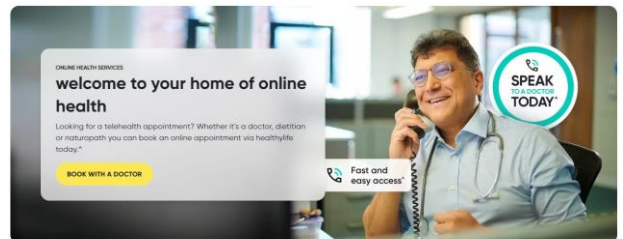
### Technology in shaping choices

Technology isn't just changing the way we communicate; it's also revolutionizing the way we consume. It has empowered individuals to gain insights into their nutritional needs and make informed choices accordingly. On one hand, consumers are actively networking to seek out health and nutrition advice while utilizing external tools like apps to keep them on track of their health goals. On the other, brands are monitoring online conversations and weighing in on topics where consumers need guided choice.



**Experience Example:** Yuka is a free mobile app that allows the user to scan the barcodes of food and personal care products, see and assess its' health impact. Each product is scanned and rated to give the consumer clear, understandable detail. Yuka also suggests comparable, healthier alternatives when products scanned have a negative impact.

**Retail Example:** Through the creation of an online platform for its subsidiary HealthyLife, Australian retail giant Woolworths offers a “one-stop-shop” healthcare solution promoting self-care for its customers. Australians may schedule a same-day, 15-minute virtual GP visit using this service, and any ensuing prescription will be filled and delivered to their house. They get access to additional services including a virtual session with a dietician or nutritionist for 30 minutes.



All telehealth

Speak to a doctor

Get an e-script

Medical certificates

Speak to a dietician

Speak to a naturopath

# THE KEY HEALTH DRIVERS

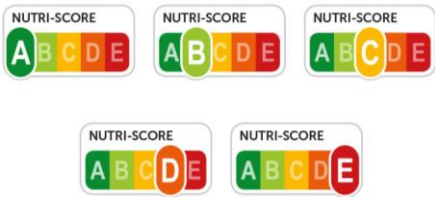
## 9. GUIDED CHOICE

### Nutritional Guidelines

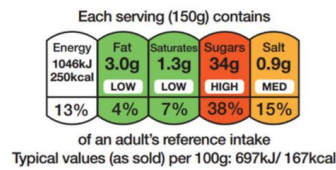
Nutritional guidelines serve as a blueprint for people who intend to adopt a healthier lifestyle. They provide evidence-based suggestions on the consumption of various food groups, portion sizes, and overall dietary patterns. Adhering to these guidelines can help individuals optimize their nutritional intake. In the 1980s, some governments initiated front-of-pack (FOP) nutrition labels. As global obesity became widespread and the increased availability of processed food emerged in the early 21st century, the number of FOP labeling initiatives grew.

Schemes can be divided into:

**'nutrient-specific' schemes**  
providing detailed nutritional information on specific nutrients.

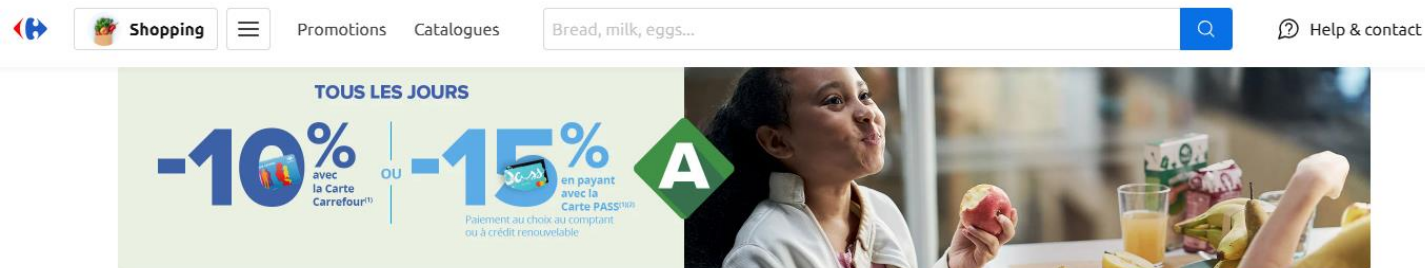


**'summary indicator' schemes** providing a synthetic appreciation of the product's overall nutritional quality/healthfulness



Customers are looking for trustworthy partners to help them to achieve their health needs, goals, and special dietary options. By offering a wide range of nutritious options and providing expert advice, retailers can position themselves as trusted partners in promoting healthy eating habits.

Albert Heijn was an early adopter of the Nutri-Score in-store and online. In 2019, they adopted front-of-pack labeling to make healthier dining more accessible to their consumers, and they continue to invest in the program's expansion. Carrefour, on the other hand, recently launched the Nutri-Score A premium rewards. This initiative offers 10 to 15% loyalty rewards on Carrefour Classic-branded products with a Nutri-Score of A to promote healthier food choices.

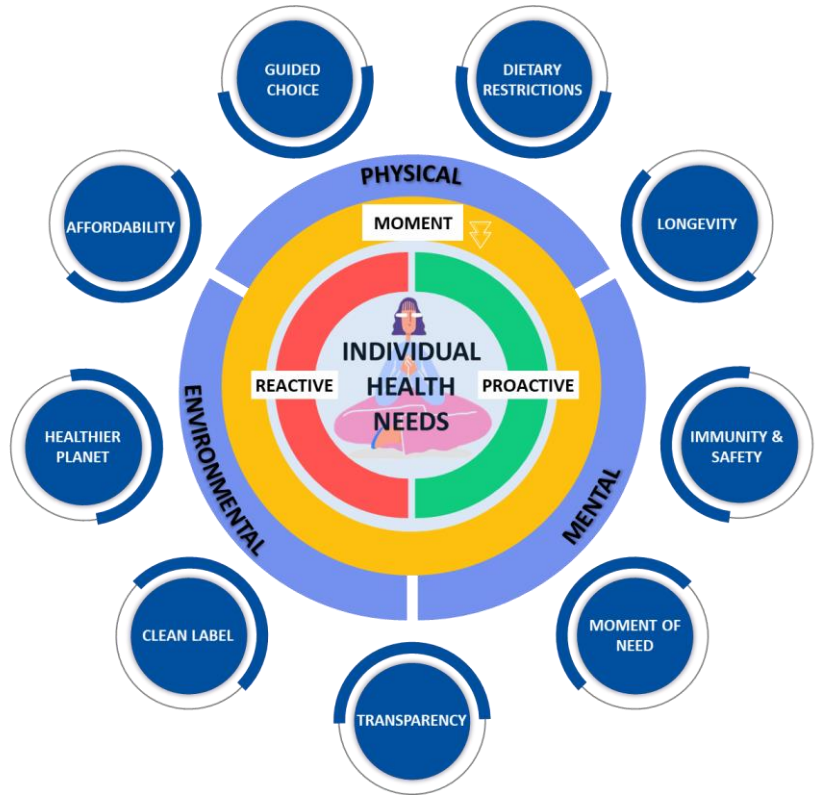




# CONCEPTS PER HEALTH DRIVER

# OVERVIEW OF THE 9 HEALTH DRIVERS

The different layers of health and the health topics (defined in the Innovation Report 20, part 1) are influenced by 9 major drivers, affecting the new rules of health and their implication for retail.



## DIETARY RESTRICTIONS

*Building better health to face the future.*

**42.5%**  
of global consumers closely read the nutrition labels of food and beverages



SUNFLOWER SEED MILK



ZERO SALT STOCKS



# LONGEVITY

Need for quality of life when aging.

42%

of global consumers are concerned about looking/feeling old



MENOPAUSE  
WELLNESS



WHEY PROTEIN FOR AGEING  
POPULATION



# IMMUNITY & SAFETY

Building better health to face the future.

41%

Of global consumers are concerned about exposure to germs and the general risk of infection in their own homes



CHAI CONCENTRATED  
TEAS



GUT-FRIENDLY SAVOURY  
SHARING SNACKS



## MOMENT OF NEED

Immediate health needs for energy, calming when looking to cope in this fast-paced modern world.

54%

of French consumers say that they are interested in the functional benefits of better sleep from food/drink



SLEEPING-AID NIGHT CEREALS



PLANT-BASED INDULGENT DESSERTS



## TRANSPARENCY

Expectation for brands to participate on individual health journeys through responsible communication.

31%

of global consumers state that the “Authenticity of brand/product” is essential when deciding on purchases

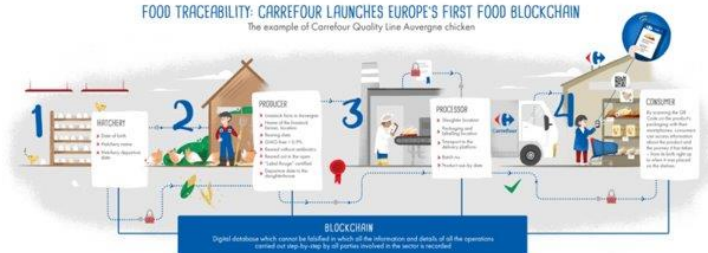


TOXICITY SCORES



FOOD TRACEABILITY: CARREFOUR LAUNCHES EUROPE'S FIRST FOOD BLOCKCHAIN

The example of Carrefour Quality Line Avoigère chicken



BLOCKCHAIN



# CLEAN LABEL

Desire for recognizable ingredients and natural less processed foods.

28%

of global consumer say that `simple ingredients` is an essential feature when deciding to make a purchase



MAGNESIUM DRY DEODORANT



PLANT-BASED, PLASTIC-FREE, BIODEGRADABLE GUM



# HEALTHIER PLANET

Changes in dietary choices as part of the broader topic of sustainability and consuming in a way that is better for the planet.

58%

of global consumers feel that they can make a difference to the world through their choices and actions



SMOKED SALMON ALTERNATIVES



POTATO MILK SMOOTHIES



## AFFORDABILITY

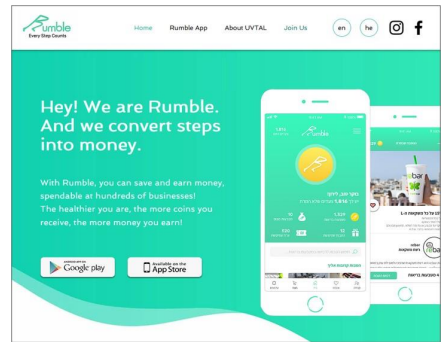
*In response to the rising cost of living, people are redefining the value of health.*

**61%**

of global consumers are confident about getting health diagnoses via automated digital diagnostic technology



TELE-NUTRITION



RUMBLE: THE APP THAT 'PAYS PEOPLE TO EXERCISE'



## GUIDED CHOICE

*Guidance on choosing and preparing foods that best support their health needs.*

**71%**

Of UK consumers trust that the NHS dietary guidelines (e.g. the Eatwell plate) are the best advice on healthy eating



LIVE-COOKING AND NUTRI-SCORE



KIDS HEALTHY EATING PROGRAMS







# FEATURED CONCEPTS

# SUNFLOWER SEED MILK

FEATURED IN 19th EDITION 



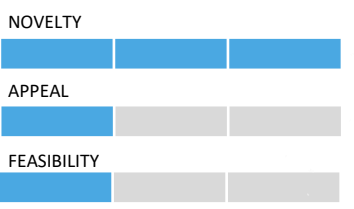
Sunflower Seed Milk is a fantastic product that is not only dairy-free, gluten-free, nut-free, and soy-free but is also produced in a more sustainable manner than other alternative types of milk.

The market for alternative and vegan products has been growing steadily, and consumers who are looking for better options for the environment can now find it in Sunflower Seed Milk. This is due to the fact that sunflowers are plants that require less water than others, such as almond for instance, a popular dairy alternative.

## DAYMON TRENDS

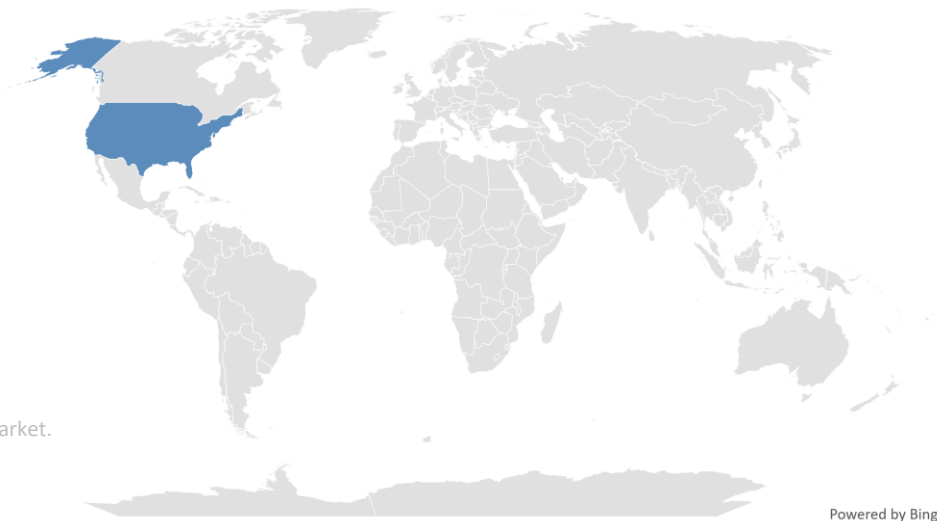


### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



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# ZERO SALT STOCKS

FEATURED IN 13th EDITION 

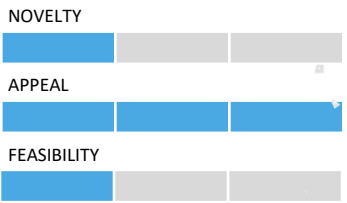


Excessive sodium levels in food have been a source of concern for many people due to potential health risks. Consumers are constantly on the lookout for healthier products as they become more aware of the diet changes they can make to improve their health. Zero Salt Stocks give consumers control over how much salt they consume. The Zero salt option is a healthier alternative to traditional stocks, which are known to contain high levels of salt, which is a source of concern for many. Despite the absence of salt, these stocks ensure that flavour and taste are not compromised.

## DAYMON TRENDS

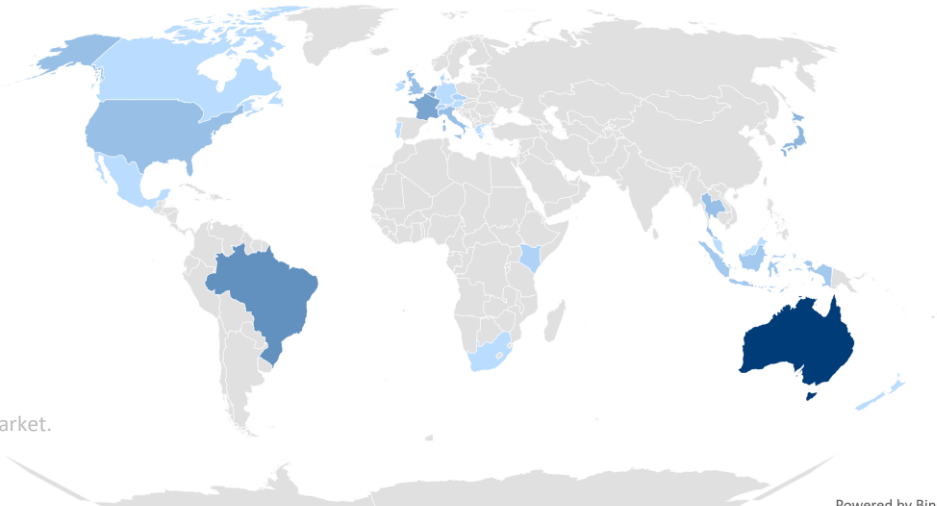


### KPIs\*



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Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



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# MENOPAUSE WELLNESS

FEATURED IN 16<sup>th</sup> EDITION 



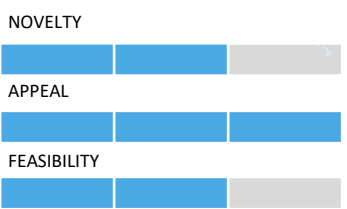
Menopause can be a challenging time in a woman’s life with her body undergoing changes that may affect her appearance and her overall well-being. As the world population rises, so does the number of women experiencing menopause, representing a sizeable opportunity for the industry.

With the growing knowledge around menopause, there is an opportunity to develop beauty and personal ranges that can answer specific needs linked to menopause (and post menopause), such as skin dryness or a reduction in skin firmness.

## DAYMON TRENDS

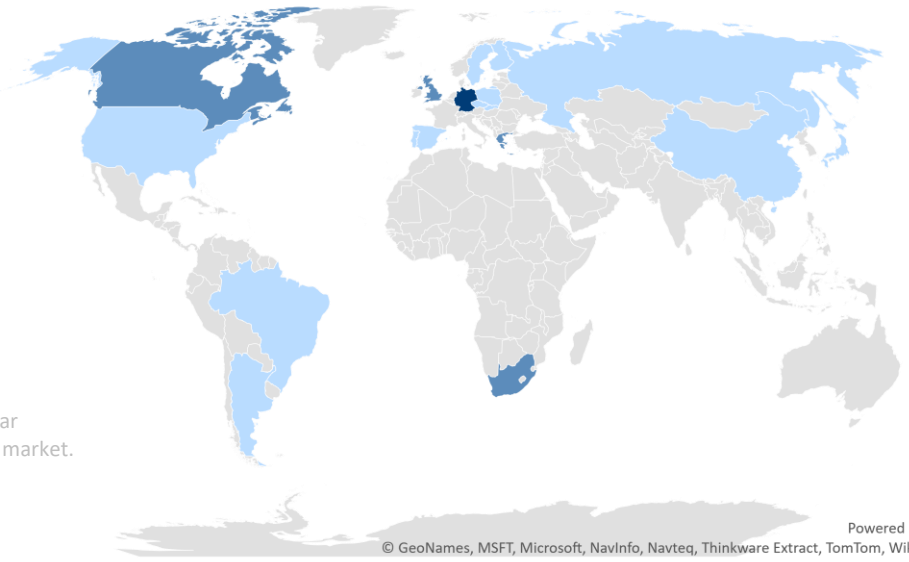


### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



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# WHEY PROTEIN FOR AGEING POPULATION

FEATURED IN 13<sup>th</sup> EDITION 



Whey protein is widely assumed to be a supplement for athletes looking to gain muscle mass, and it has been used for this purpose until new studies revealed its efficacy for the aging population.

Whey supplementation has been shown to help prevent muscle mass loss in the elderly, inhibit weight gain, and lower the risk factors for cardiovascular disease. Overall, it is said to help promote longevity. This creates the opportunity for players in this industry to develop whey protein supplements to recruit elderly consumers to the supplement category.

### DAYMON TRENDS

### INTERNATIONAL REACH



#### KPIs\*

NOVELTY



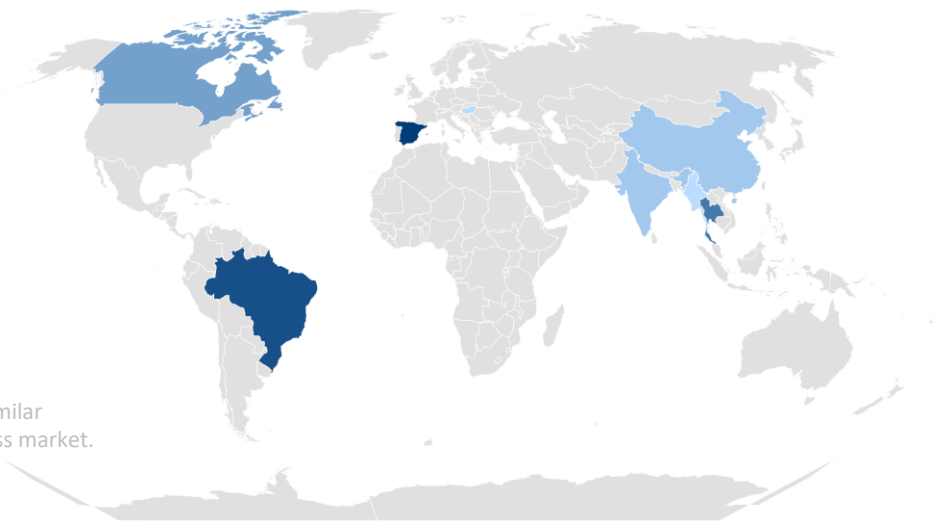
APPEAL



FEASIBILITY



\* KPI's score from Daymon Experts  
Novelty and Appeal KPI's based on similar concepts already observed in the mass market.



# CHAI CONCENTRATED TEAS



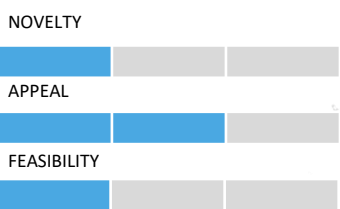
As consumers look towards more proactive choices in relation to their health, they are increasingly interested in products that provide more than just nutrition.

Tea serves many different purposes, and many ingredients from which tea can be made are inherently good for you. Chai tea is a combination of spices that have been used for centuries due to its broad variety of functional health benefits. These concentrated versions go a step further to offer consumers a simple and convenient solution to include in their daily routines and in their different dishes and drinks.

## DAYMON TRENDS

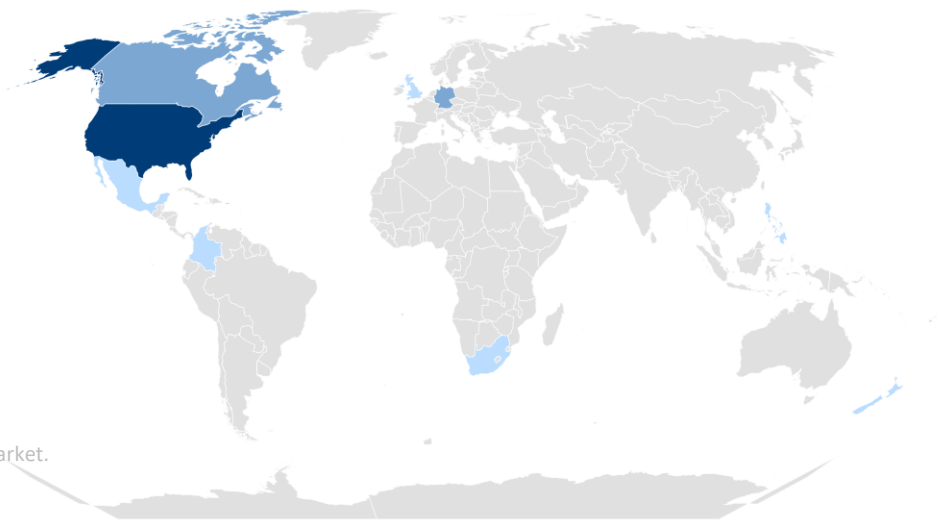


### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



# GUT-FRIENDLY SAVOURY SHARING SNACKS



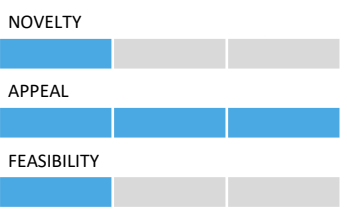
Gut health continues to be a focus across regions as the link between the gut and health is increasingly linked to supporting a healthy immune system. The digestive health claim is expanding its category reach in savoury snacks such as crisps, chips, puffs, and crackers, as evidenced in sharing and grab-and-go forms.

Savoury snacks present an opportunity to engage consumers looking for digestive health solutions for themselves and their families whilst still catering to their desire for indulgence.

## DAYMON TRENDS

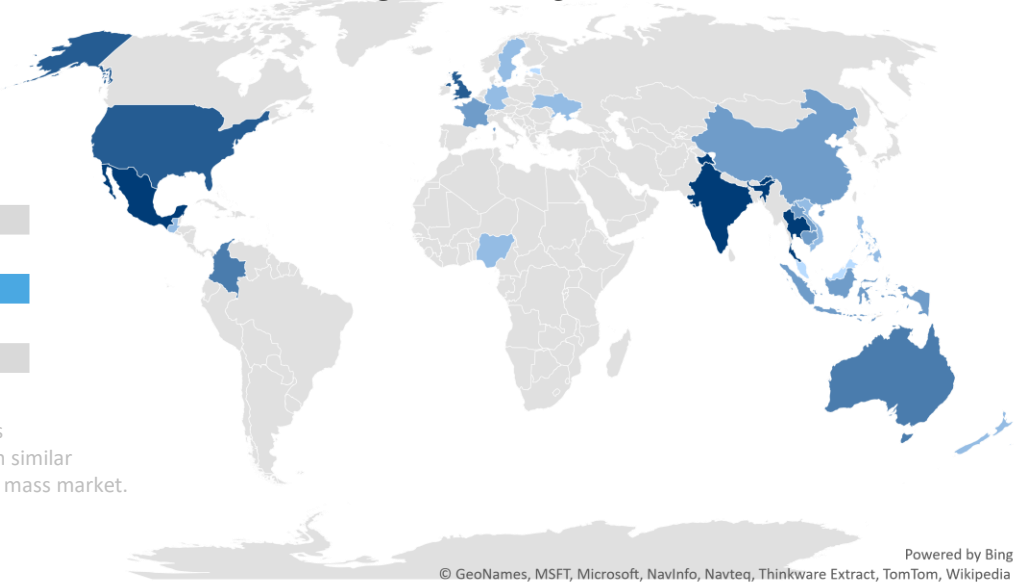


### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



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# SLEEPING-AID NIGHT CEREALS

FEATURED IN 19<sup>th</sup> EDITION 



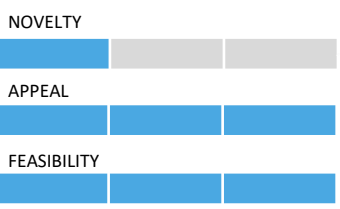
Many consumers make it a habit to eat something quick before bed to settle their tummies before a long night of sleeping.

In order to give individuals a different approach to aid in a better and more relaxing night's sleep, new cereal concepts with added herbal blends, vitamins, folic acid, and melatonin, among other features, can be developed. These cereals are a fantastic alternative that can be used to replace sleep aids as well as sate late-night snack desires.

## DAYMON TRENDS

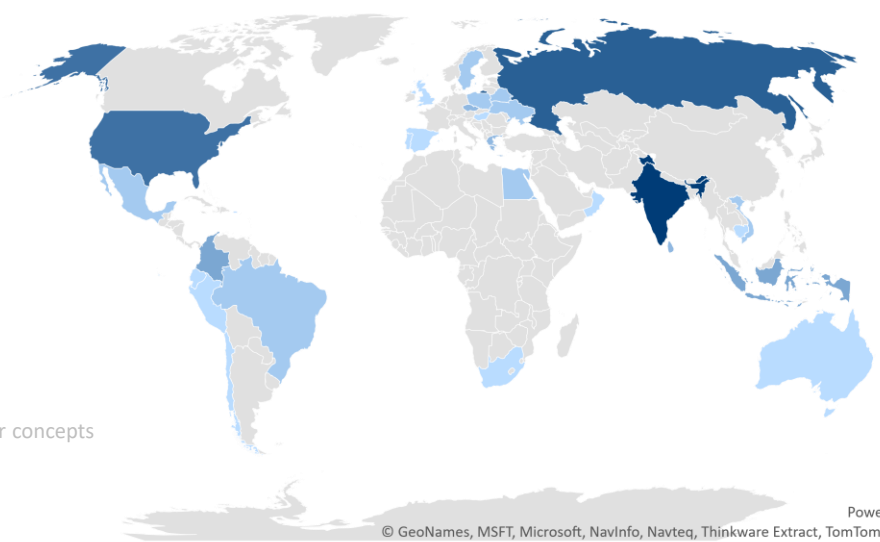


### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



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# PLANT-BASED INDULGENT DESSERTS

FEATURED IN 17<sup>th</sup> EDITION 



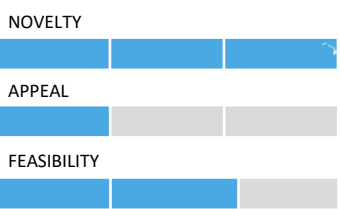
Plant-based diets are already widely recognized as a trend that is set to stay. This means that there are many opportunities to develop the trend beyond its core and develop new solutions that can satisfy the craving for healthier, indulgent options.

As plant-based desserts are already well established - such as soya-based chocolate desserts, there is room to mimic the premiumization of dairy-based desserts with multi-layered products that trigger several senses. It offers consumers a dessert that is healthy, ethical, and yet still indulgent.

## DAYMON TRENDS



### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



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## TOXICITY SCORES

FEATURED IN 13<sup>th</sup> EDITION 



In 2019, the idea of implementing a toxicity score was initially introduced with the Ménag' Score tool by the National Consumer Institute (NIC) in France. This initiative's goal was to draw attention to the toxicity of common household products since there are several thousand potentially toxic ingredients used in household products, and these lists are difficult for consumers to understand.

This led to the inclusion of the Toxi-Score in the National Environmental Health Plan 2021-2025 (FR). The proposed Toxi-score project is inspired by the Nutri-Score, allowing consumers to easily recognize the level of toxicity between household products. It categorizes products on a scorecard from A to E, with A being the safest and E being the most hazardous.

This initiative provides consumers with a better understanding of which products and ingredients are safe for the environment and for them. This is an opportunity for brands to participate in educating consumers so they can make better decisions. It also encourages businesses to rethink their formulas and use greener ingredients to lower toxicity.

### DAYMON TRENDS

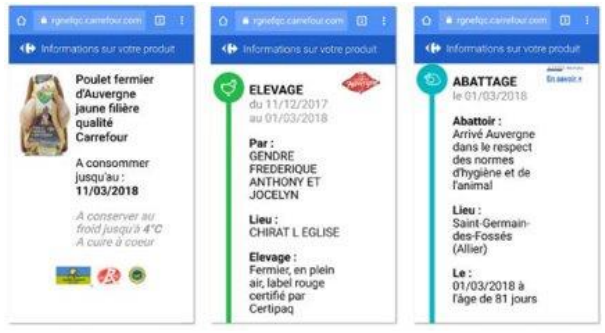


# CARREFOUR BLOCKCHAIN

FEATURED IN 2<sup>nd</sup> EDITION



FOOD TRACEABILITY: CARREFOUR LAUNCHES EUROPE'S FIRST FOOD BLOCKCHAIN  
The example of Carrefour Quality Line Auvergne chicken



After Walmart's move to Blockchain in 2016 with IBM, Carrefour was the first European retailer to use Blockchain technology to ensure product traceability.

The retailer said Blockchain 'is a secure digital database that cannot be falsified in which all information sent by its users is stored'. The use of Blockchain technology is to create a safer, more sustainable system but also to save time, remove costs, reduce risk, and, ultimately, increase trust in products.

The Product label carries a QR code that gives access to all the information on the hatchery, the producer, and the processor. In 2022, the goal was to apply this technology to all Filière Qualité Carrefour (FQC) food products including nearly 60 Carrefour-branded sectors and more than 1,000 product references and plans to have its exclusive brand of textiles be sustainable and traceable by 2030.

In 2021, P&G and Walgreens, adopted CuBE, an anti-counterfeit solution to prevent coupon fraud using blockchain to verify coupon authenticity at POS.

## DAYMON TRENDS



# MAGNESIUM DRY DEODORANT

FEATURED IN 16th EDITION 

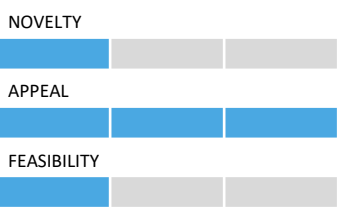


Deodorants containing antiperspirant ingredients answer the needs of those who seek to control perspiration and combat odours. Aluminum is an ingredient in antiperspirants as it reduces perspiration, however, consumers are concerned about the fact that it can be absorbed into the body and the possible side effects this may have on their health. New deodorants with antiperspirant properties are emerging, containing magnesium and replacing aluminum. Magnesium is a mineral known for its importance in our bodies, such as supporting muscle and nerve functions.

## DAYMON TRENDS

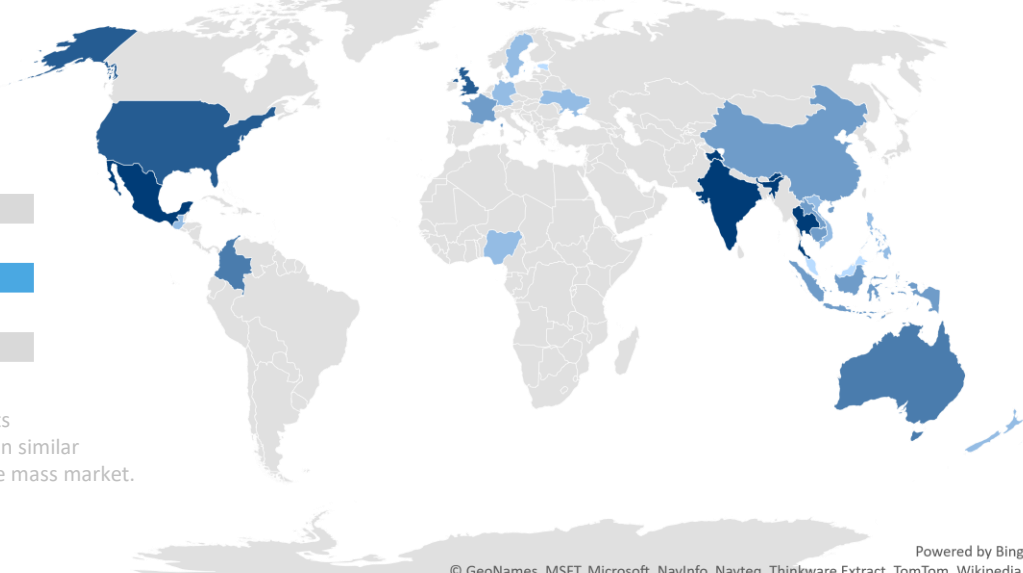


### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## INTERNATIONAL REACH



# PLANT-BASED, PLASTIC-FREE, BIODEGRADABLE GUM

FEATURED IN 13th EDITION 



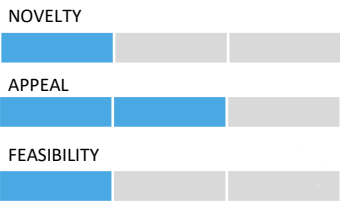
The quest to remove plastic from products and packaging has been ongoing for many categories, and we have recently seen that this movement is also occurring in the gum category.

Chewing gum is a one-time use and throw product that is known to contain plastic, to create the chewing gum's stretchy and sticky texture. There is the opportunity to capitalize on the plant-based trend to offer consumers a range of plastic-free and biodegradable chewing gum alternative that is better for their health and the environment.

## DAYMON TRENDS

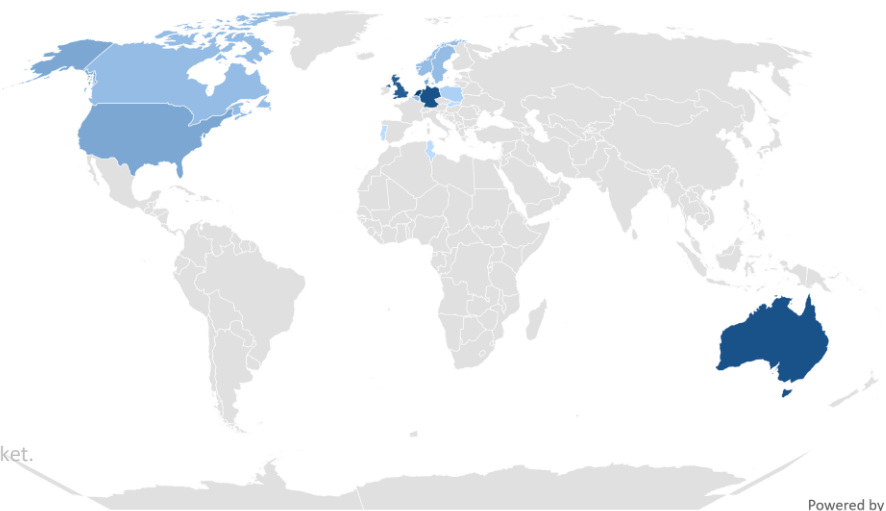


### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

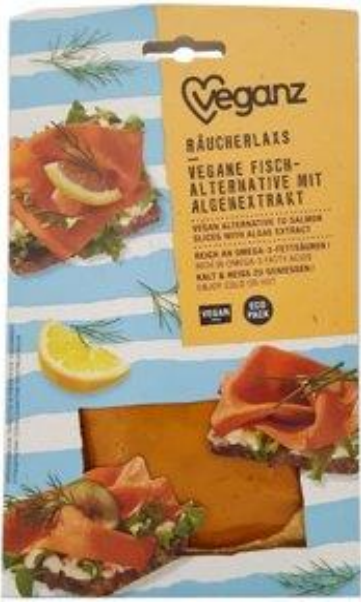
## INTERNATIONAL REACH



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# SMOKED SALMON ALTERNATIVES

FEATURED IN 17th EDITION 



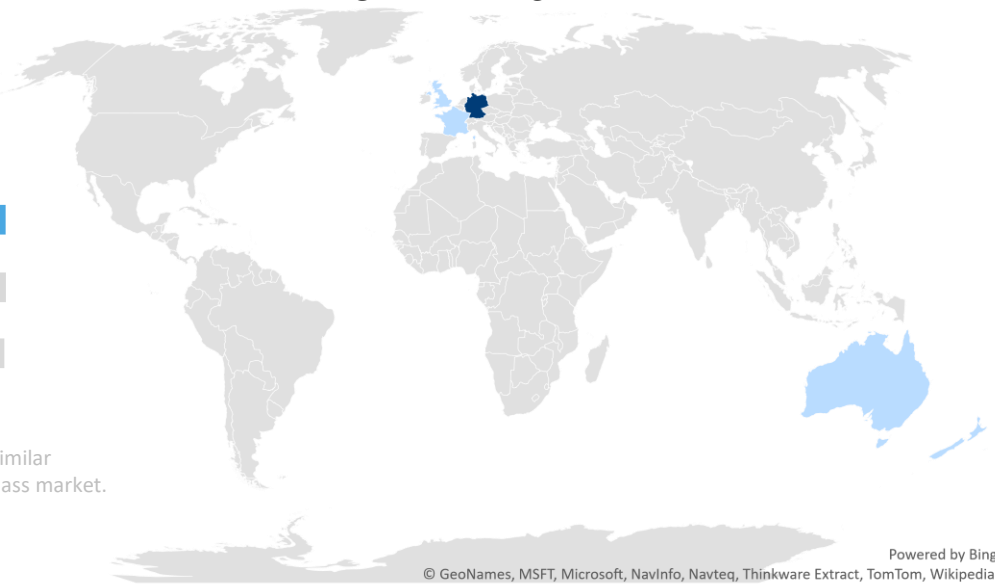
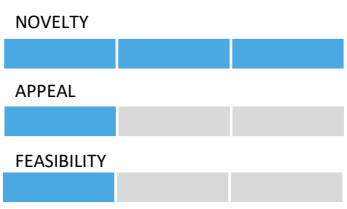
As consumers embrace more plant-based and flexitarian diets, many meat and fish alternatives have emerged to satisfy the cravings of those consumers who no longer consume meat and fish in the traditional sense but still want the meat or fish experience; not only in terms of nutritional content but also for the sensory experience. Following real meat alternatives, vegan and plant-based versions of smoked salmon have recently emerged, such as a soon-to-be-released product from Israeli startup company Simply Good - which uses algae spirulina to create an alternative smoked salmon where taste and texture are mimicked.

## DAYMON TRENDS

## INTERNATIONAL REACH



### KPIs\*



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

# POTATO MILK SMOOTHIES

FEATURED IN 19<sup>th</sup> EDITION 



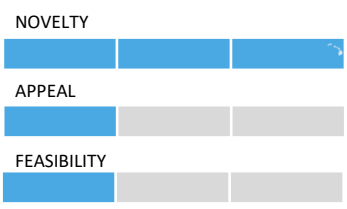
Due to its primary constituent, the potato - potato milk is a relatively new product on the market and was developed as a more environmentally friendly substitute for other plant-based beverages. Plant-based fruit smoothies can be made using potato milk as the foundation, giving the beverage's plant-based version a silky feel.

These beverages can make the perfect snack or breakfast for customers looking for plant-based and allergen-free goods because they provide numerous nutrients, including vitamins, minerals, fibre, and carbohydrates.

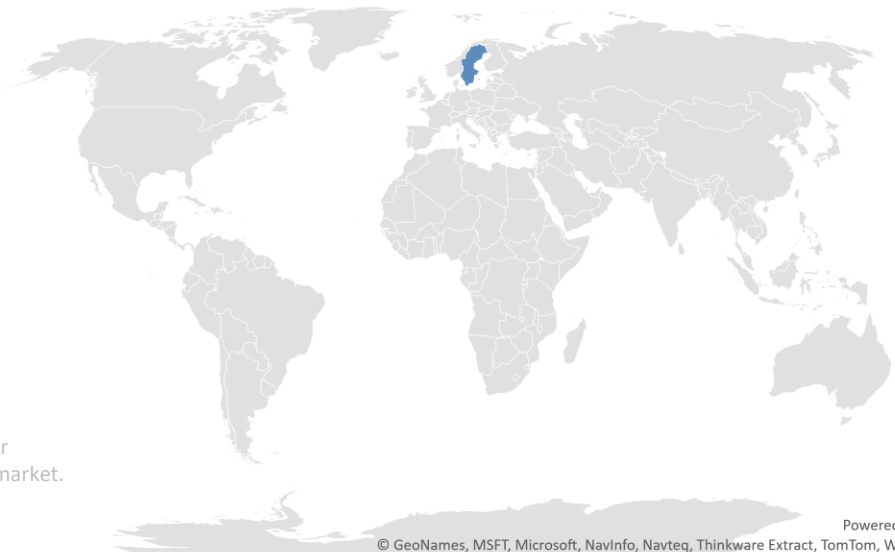
### DAYMON TRENDS



#### KPIs\*



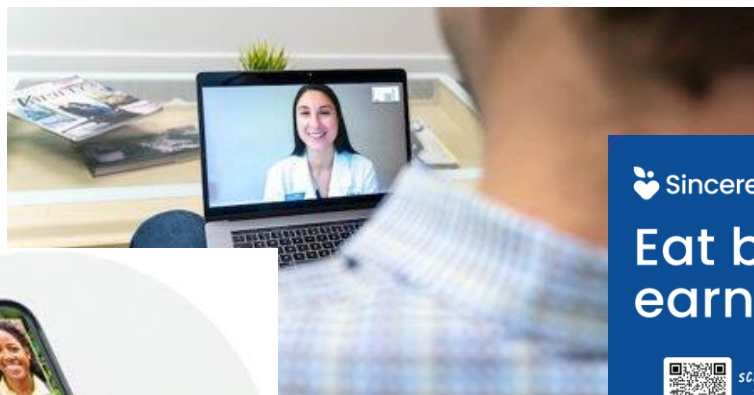
### INTERNATIONAL REACH



\*KPI scores from Daymon experts  
Novelty and Appeal KPIs based on similar concepts already observed in the mass market.

## TELE-NUTRITION

FEATURED IN 9<sup>th</sup> EDITION



Sincerely Health

### Eat better, earn rewards

SCAN TO GET STARTED!

- ✓ Get quick nutritional insights
- ✓ See if you're balancing all 5 food groups
- ✓ Earn rewards for eating more nourishing foods

**\$25 off groceries\* when you sign up**

\*Terms apply. Scan QR code for details.

**Nutrition Insights**

Last 30 days Last 7 days By Month

Balance your purchases with MyPlate.gov guidelines.

Food Group	Percentage
Protein	66%
Dairy	22%
Fruits	50%
Vegetables	110%
Grains	20%

Update my household details →

Item overview ⓘ

Basket items categorized as essential or occasional food & beverages.

The development of partnerships between retailers and nutritionists to offer tele-nutrition as a service to consumers, to help encourage a healthy lifestyle. This was seen by Kroger during the coronavirus crisis, in 2020 to help people, where participants received a complimentary virtual consultation via a two-way video chat with a registered dietitian. The sessions provide personalized support such as adjusting to tighter budgets or encountering reduced access to fresh or favourite foods. Dietitians may also address management of food-related health concerns. Kroger continues to provide Telenutrition and Virtual care appointments online.

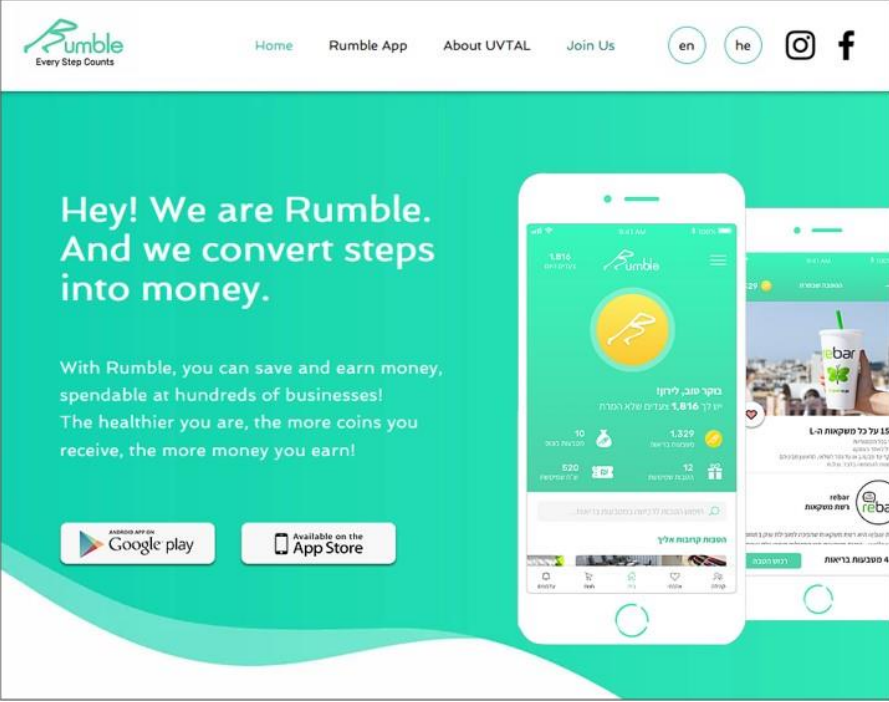
The new Albertsons *Sincerely Health* Platform Nutrition Insights continues the virtual health trend. This new feature provides USDA MyPlate-based nutrition advice on supermarket purchases. Encouraging healthier eating habits including cooking at home, limiting sugary sweets, and reducing fried food. Meeting MyPlate guidelines earns customers weekly and monthly prizes. Redeem points for supermarket coupons and discounts on fresh vegetables, seafood, and meat.

## DAYMON TRENDS



# RUMBLE: THE APP THAT 'PAYS PEOPLE TO EXERCISE'

FEATURED IN 19th EDITION 



A healthy lifestyle, keeping fit, and saving money are some of the top priorities for many people worldwide. The challenges are to find motivation and time to exercise.

To address these issues, some programs and activities have been developed, with Pokemon GO among the first to offer a gamified workout experience. Rumble is also a recent arrival in this area.

With the help of the software, Rumble users may earn tokens that can be used at restaurants, shops, and other establishments in exchange for taking steps. To enhance the consumer experience, these reward programs can even be integrated with loyalty initiatives.

## DAYMON TRENDS



## LIVE-COOKING AND NUTRI-SCORE

FEATURED IN 13<sup>th</sup> EDITION 



To meet the needs of consumers who want to enjoy a better diet, Carrefour is collaborating with five major FMCG companies (Barilla, Bel, Danone, Savencia, and Unilever) and their iconic brands to create balanced, gourmet recipes that are all rated 'A' or 'B' by Nutri-score.

Three live-cooking sessions were organized by the brands and their team of chefs for people to learn how to create specific recipes in real-time. The recipes showcased during the live sessions were made with products that are either sold by the brands or are Carrefour Private Brand products. Furthermore, to promote the preparation of healthier meals, most of the products were on special offer, so shoppers could prepare meals at an affordable price.

Through the live sessions, retailers were able to engage in initiatives to provide healthier and balanced diets for their consumers and be part of educating consumers on better purchasing behaviours. It is also a chance for retailers to strengthen their relationship with brands and consumers and create new channels of communication.

### DAYMON TRENDS



## KIDS HEALTHY EATING PROGRAMS

FEATURED IN 13<sup>th</sup> EDITION 



Across countries, retailers, among which Tesco, Kroger or Lidl, have been developing free fruits initiatives in store to encourage kids to have healthier eating habits; the aim is to acting upon kids obesity and overweight.

In 2019, Spartan Nash developed a full program to encourage healthy eating choices for children and reinforce its commitment to health and wellness in every aisle of its retail stores. The program is called Kids Crew program and is highly educational, designed to promote children's healthy eating and call attention to the importance of nutrition and active lifestyles to both the little ones and their parents. It provides in-store activities, including fresh fruits for kids and store tours, as well as online resources such a computer games, recipes among other activities.

The goal of Kids Crew is to introduce kids to healthy foods for them to understand the important role food plays in their everyday lives and discover as they grocery shop and cook meals at home.

As a part of the Kids Crew program, Spartan Nash has also teamed up with Field Trip Factory to offer supermarket tours for pre-K through sixth grade and special needs classes. Classes of between eight and 30 kids can take part in these Kids Crew supermarket tours.

### DAYMON TRENDS



# APPENDIX

# KPIs USER GUIDE



- All concepts are grouped per *Key Theme*. Next to each picture, there is a link that, when clicked, sends the reader directly to the concept's own page. There, more information about the concept is provided such as Daymon Trends, International Reach, and the Novelty, Appeal and Feasibility KPIs.
- On each concept page, the same link icon is available. When clicked, it will bring the reader back to the corresponding Key Theme.



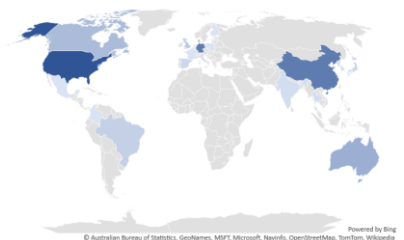
## DAYMON TRENDS



Each new concept answers to one or several Daymon trends. The Daymon trend assessment provides a framework for identifying business opportunities.

## INTERNATIONAL REACH

The International reach map refers to time and reach. It analyses the number of years per country with similar concepts, the darker the color implies similar concepts have been launched for longer than in other countries.



## NOVELTY

*Novelty KPI is to understand if the concept has been tested worldwide for several years or if it is recent. Each concept is screened for the last 5 years*

## APPEAL

*Appeal KPI refer the growth of manufacturers developing the given type of concept fore the last 5 years. The appeal is measured on the last 2 years.*

## FEASIBILITY

*Feasibility KPI is to understand the level of complexity to develop a similar concept with suppliers (either current supplier or new supplier)*

**Low Novelty** – the concept is being seen for several years, but with growing reach

**Low Appeal** – the share of new manufacturers developing the concept is low

**Low Feasibility** - the concept is technically complex to co-develop with a supplier. It can also be patented.

**Medium Novelty** – the concept is being seen for few years, growing reach

**Medium Appeal** – The share of new manufacturers developing the concept is between 30 and 60%

**Medium Feasibility** – the concept requires time to co-develop with a supplier.

**High Novelty** – the concept is being new (one year or less)

**High Appeal** – the number of manufacturers and share of new joiners is larger and growing (60% and more)

**High Feasibility** – not complex to develop as similar technologies are already used for other concepts

# 6 MEGA TRENDS SHAPING WHAT'S NEXT



Societies are transforming, driven by shifting demographics, economic pressures, technology, and a newfound outlook around embracing individual differences. This increasingly diverse population has varying and specific needs, resulting in changing expectations of products and retailers as well as new buying behavior.



Health and Wellness has become a mainstream desire, with evolving and varying definitions across consumers and lifestyles. Consumers have a wide range of wellness aspirations, from simply looking to extend beyond traditional routines to achieving an ideal state of holistic well-being. This pursuit is driving demand for total solutions that are tailored to specific lifestyles and unique health needs, without sacrificing overall quality expectations.



As global digital adoption and seamless integration quickly accelerate, the lines between the physical and digital continue to blur. Ease of use, desire for connection, and expectations of “anything, anytime, anywhere” will continue to evolve retail and propel innovation forward across products, services, formats, and experiences – while at the same time demanding awareness of the negative impact of technology.



With historically unprecedented population migration and advances in technology, humanity has become globally linked. Interconnectedness is influencing behaviors towards global environmental issues, social justice concerns, sustainability initiatives, and the desire for community both locally and beyond borders. There is a growing awareness that individual actions affect the whole world, and vice versa, and that these networks are often inherently fragile.



In an increasingly turbulent world, consumers are looking for ways to drive satisfaction and happiness in everyday life – both for themselves and those around them. As a result, demand for products, services and experiences that deliver enhanced engagement, simple joys and empowerment is becoming more pronounced.



The definition of value is evolving, and one size does not fit all. Consumers are assigning value across multiple dimensions based on their personal needs such as quality, transparency, budget, and accessibility to reach a balance. Addressing this balance is key as shoppers are becoming more selective and mindful in their spending.



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