



# MERCADO

Alimentación y salud



Malwine Steinbock  
**Food Republik** | *Strategy Director*





**Food Scouting**  
INNOVATION UPDATES

# Foco Salud 2025

Global Insights  
For Local Innovations

Sept. 2025





TRIPPIN' FLAVOR  
KILLER CRUNCH

# POPADELICS<sup>®</sup>

crunchy mushroom chips

trippin'  
truffle  
parm



gluten  
free

vegan  
V



NET WT 1.4 OZ (40g) ©

180  
CALORIES  
PER PKG



# TENDENCIAS EN SALUD

18 de Septiembre 2025

1.

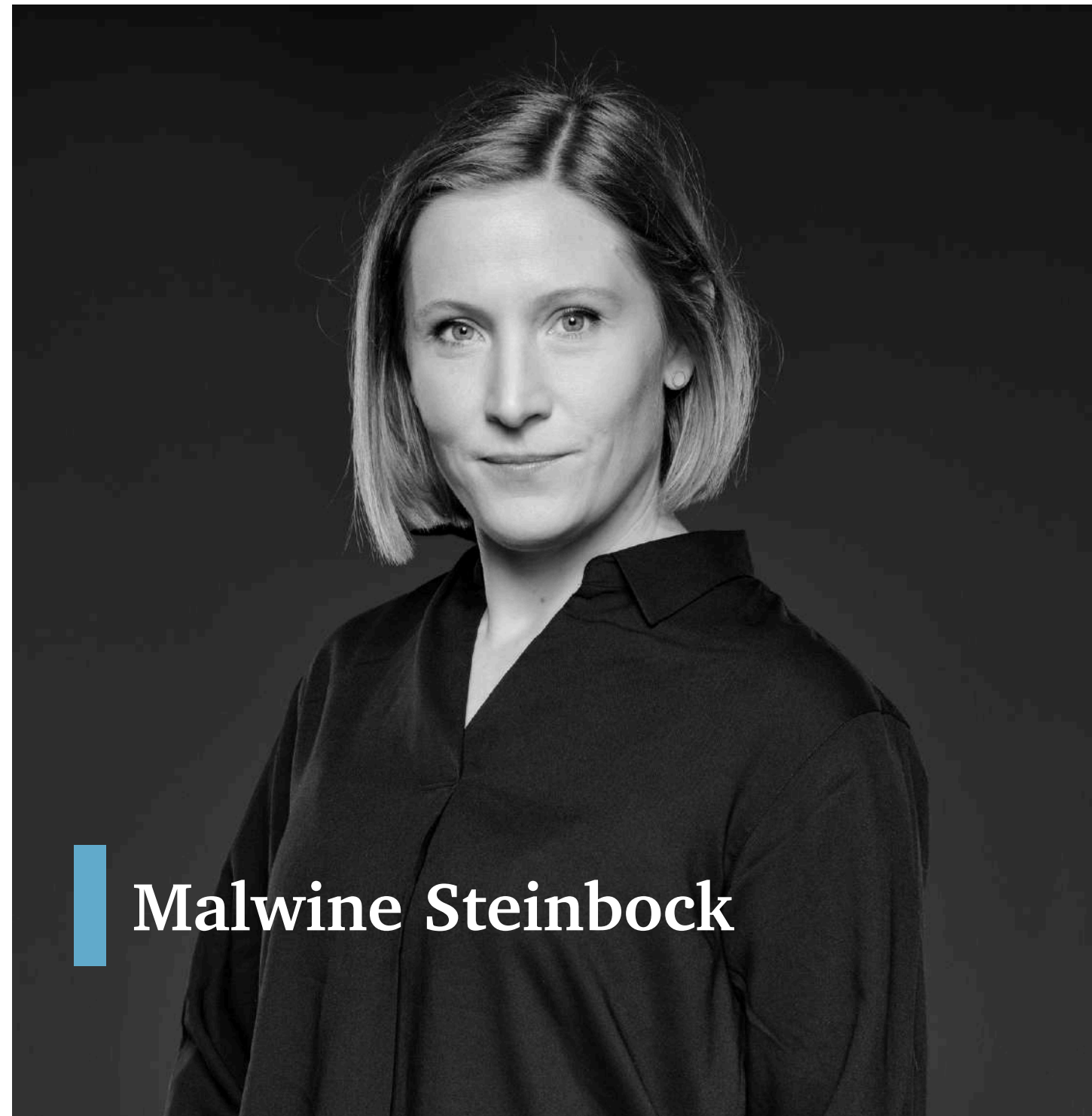
**Contexto  
y Método de análisis**

2.

**Demandas del consumidor  
& tendencias salud**

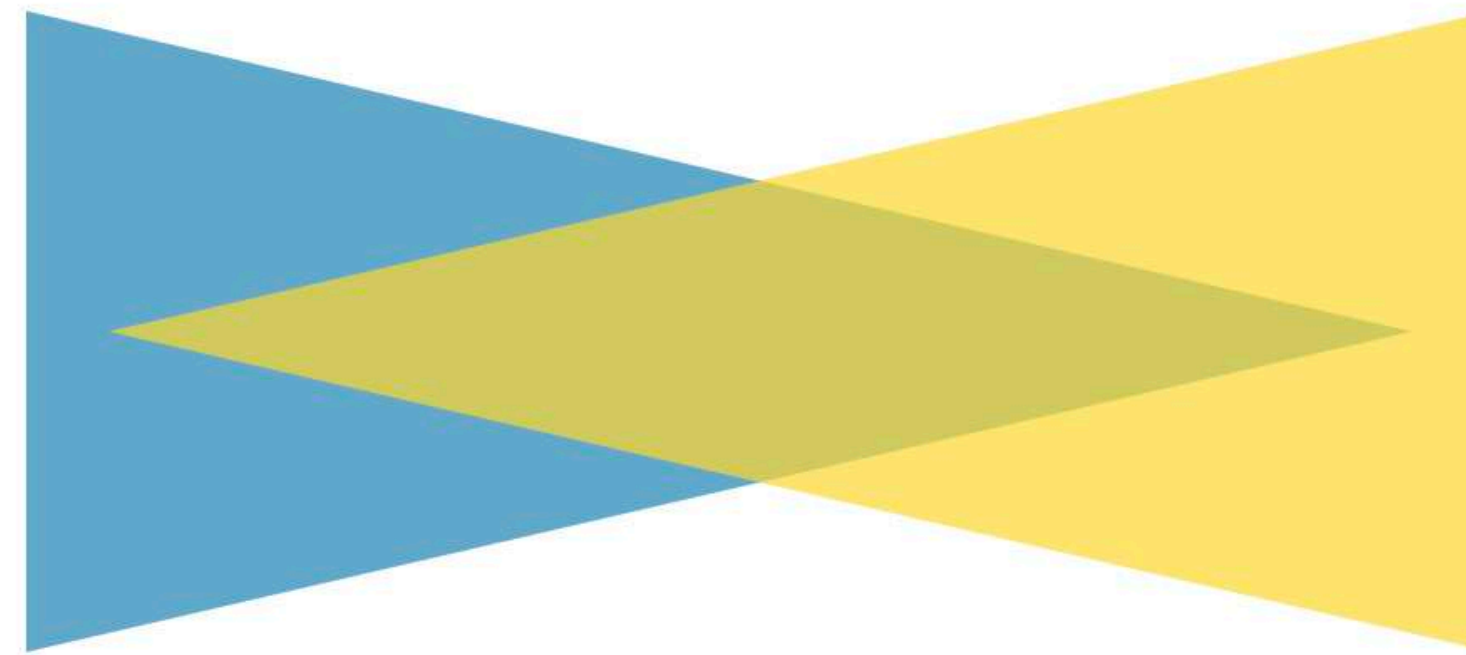
3.

**Casos y estrategias  
en 20+ categorías**



Malwine Steinbock

# Metodología Inspiración y Acción



Víctor Fortunado





# Transformación del Food System



Tensiones



Tendencias





# Challenges of the food system



FEEDING 10 BILLION



CLIMATE CHANGE



SUSTAINABLE PROTEIN



CONTAMINATION



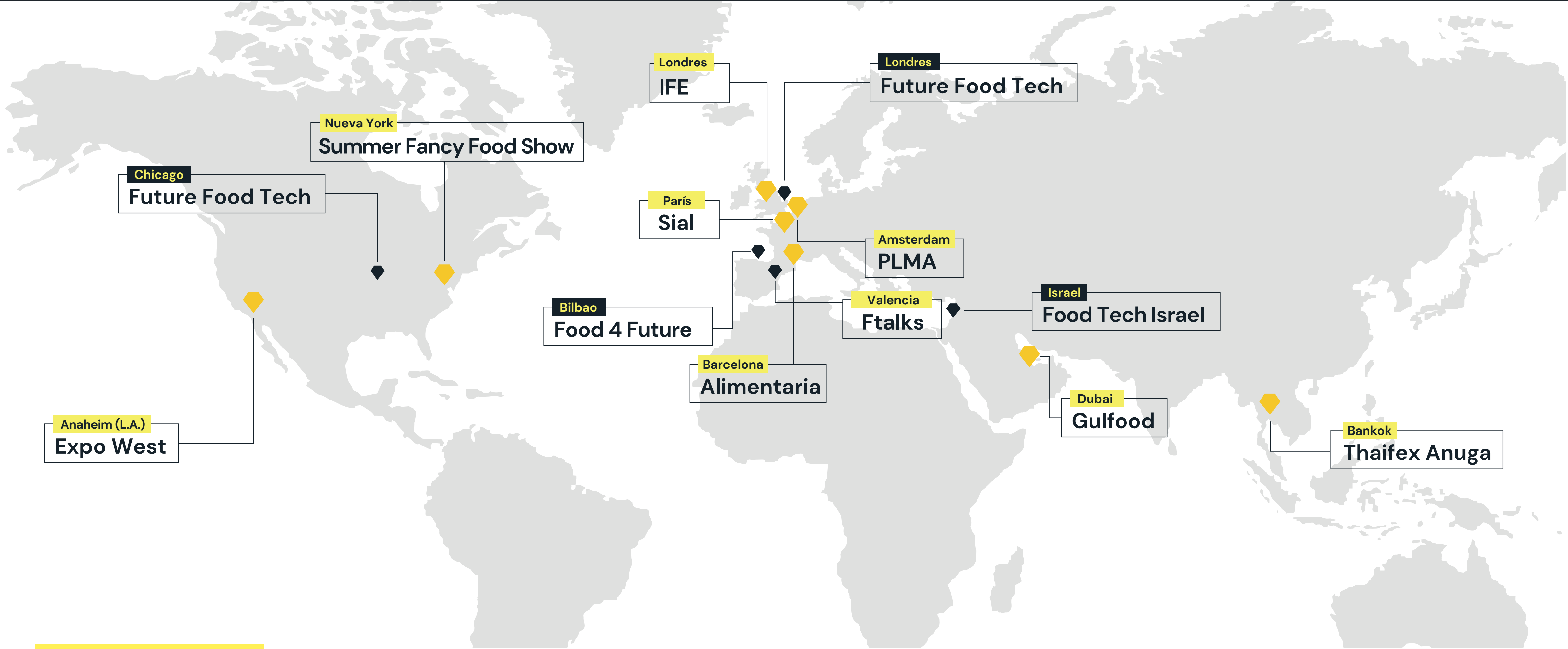
FOOD WASTE



DIET & DISEASE



# Where are the next opportunities in Food & FoodTech?



**Global Key Events**

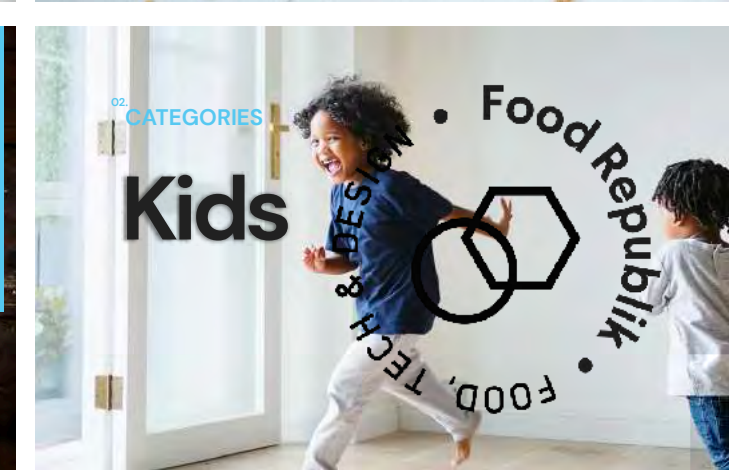
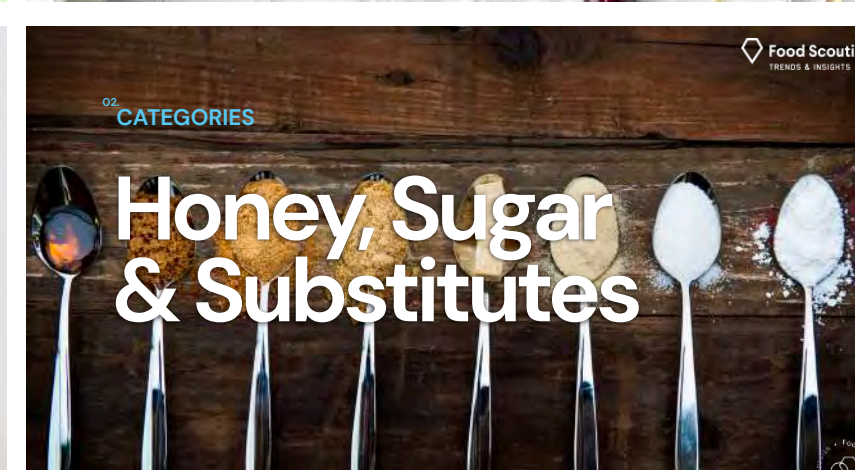
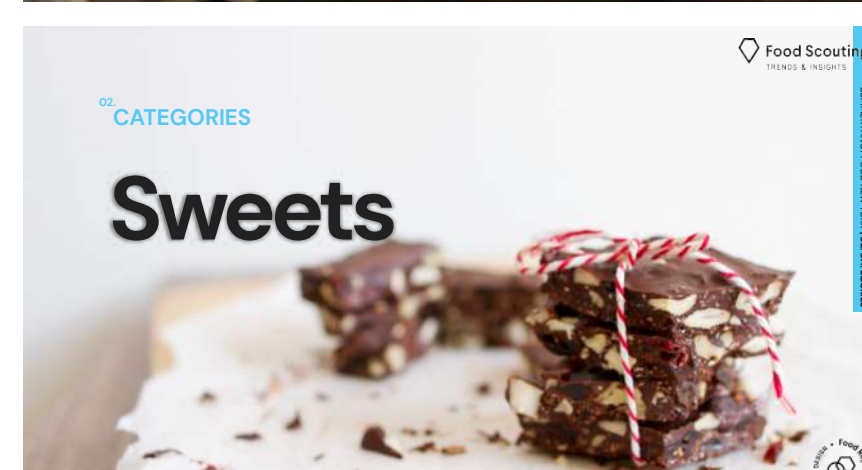
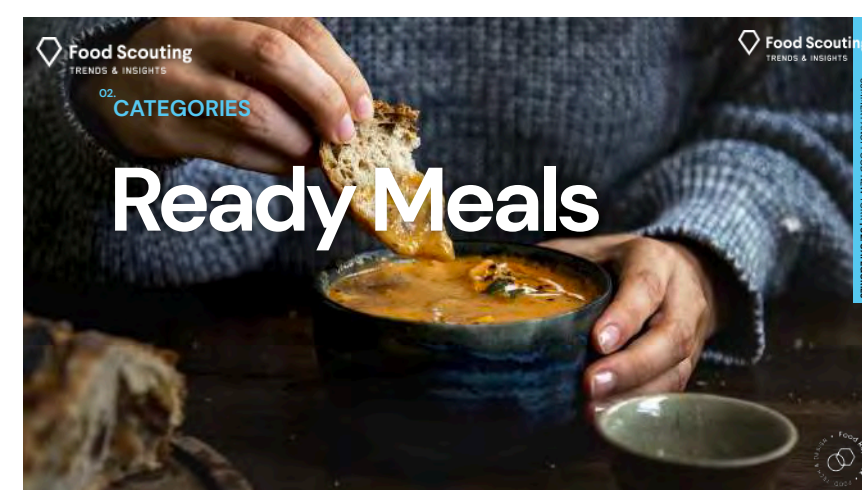
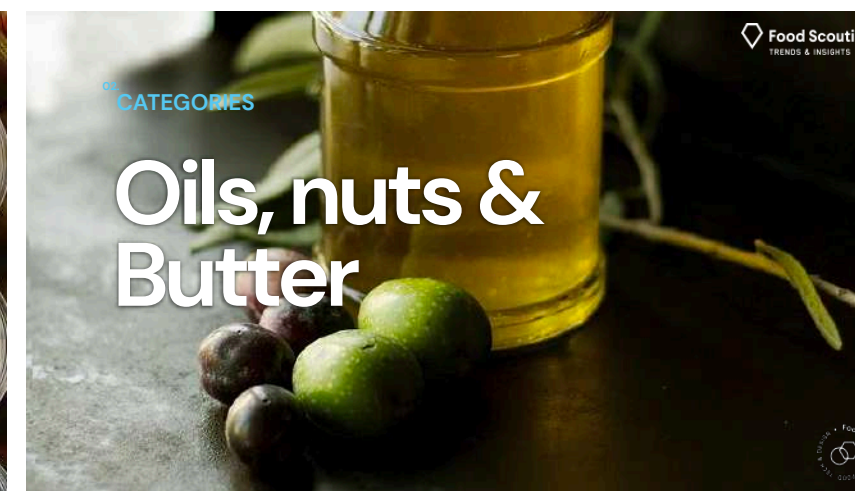
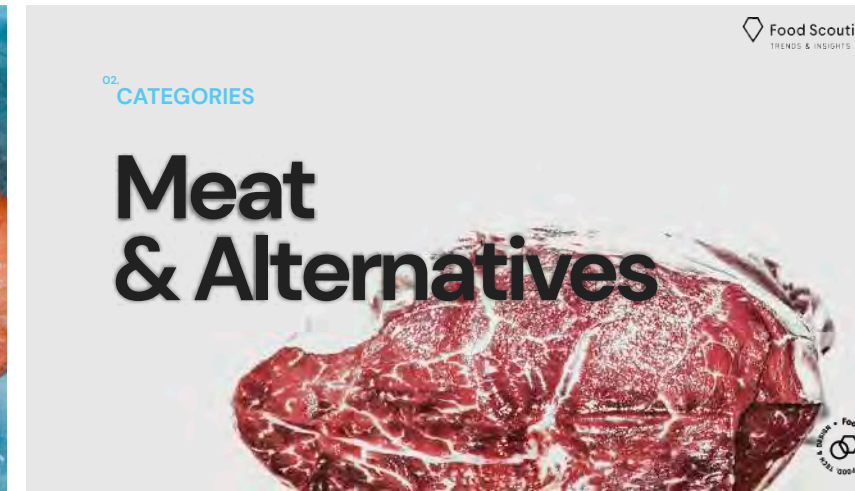
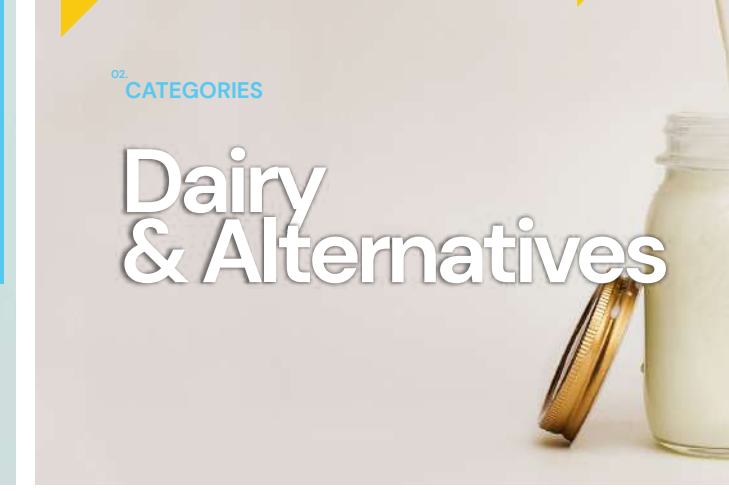
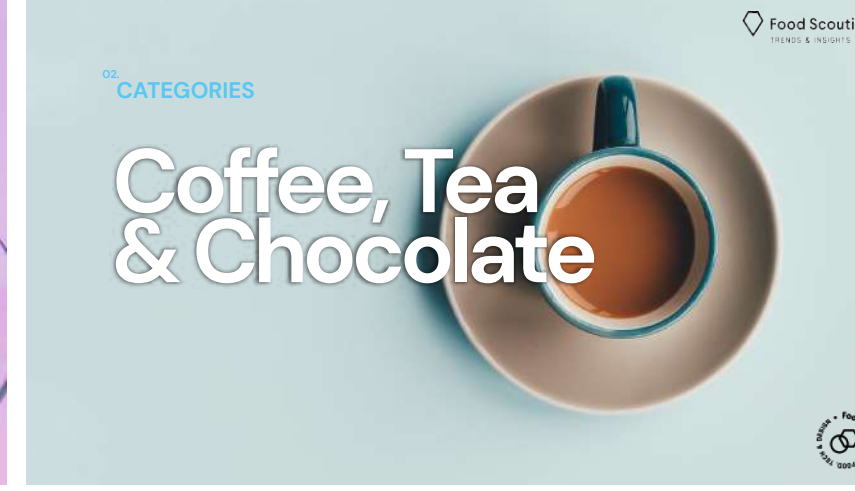




# Opportunities 20+ categories

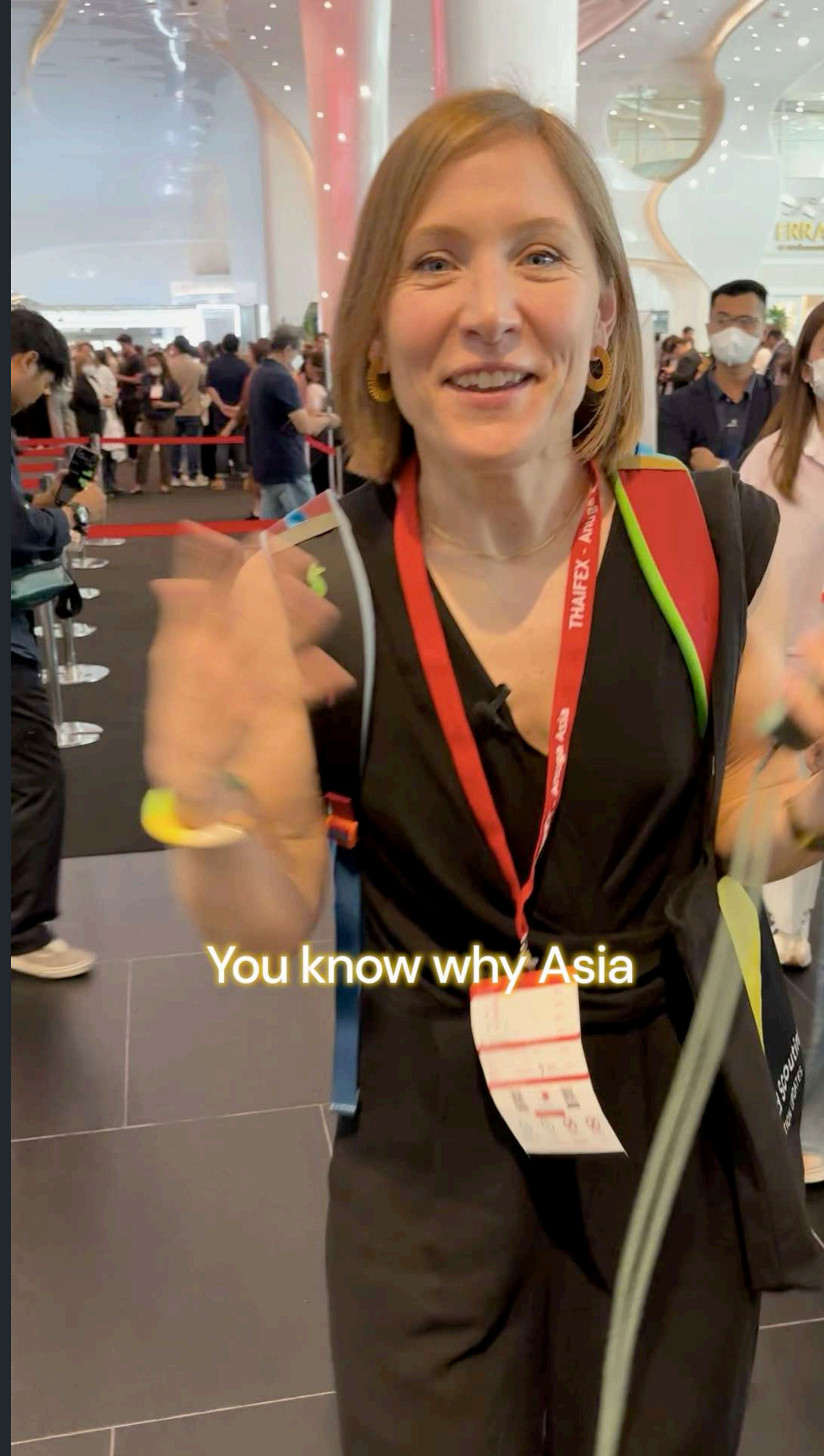
What's hot & new:

- ◆ **Products**
- ◆ **Ingredients & Flavors**
- ◆ **Consumer trends**
- ◆ **Technologies & Formulation**
- ◆ **Players & Startups**
- ◆ **Claims & Packs**









You know why Asia



**Food Scouting**  
TRENDS & INSIGHTS



# *Thaifex Anuga* Bangkok, 2025





02.

# Top Trends & Opportunities



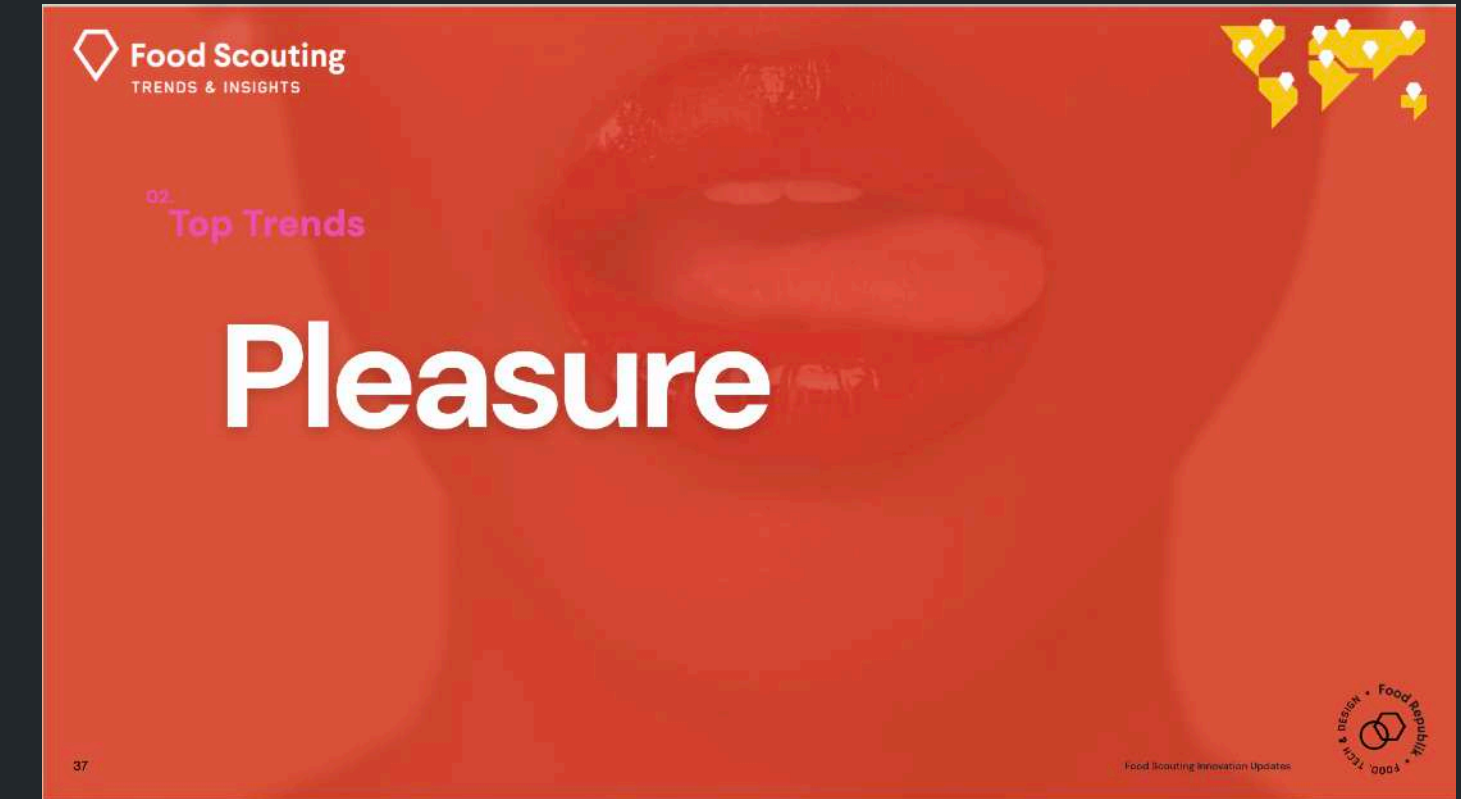
# Brand Building Model<sup>®</sup>

Dónde están las oportunidades





# Health vs. Pleasure in 2025





02.  
**Top Trends**

# Health





# 7 out of the 10 leading causes of death are diet and nutrition related.

**Cardiovascular disease** – leading cause of death

**Cancer** – 3.7m new cases in Europe every year – 2nd cause of death

**Dementia** – 1/3 will be affected – 3rd cause of death

**Obesity** – affecting +50% of population

**Diabetes Type 2** – 33m Europeans // approx. 10% of population

**Digestive Issues** – affect 50% of population



# Food as Medicine

## Personalized nutrition

**Disease prevention.** Create meal plans, personalized recommendation, personalized supplements, match ingredient to health needs and preferences.

**(Semi) Personalized Nutrition** Nutrition plans targeting age, gender, activity level and goals.

**Wearables & Test kits** Health trackers +15.5% CAGR, DNA, Microbiome, Blood tests, ... glucose meters

**Computer Vision** – 17% of Millennials and Gen-Z are tracking their diet daily





# Functional Nutrition winners: Energy & Gut health



<sup>1</sup>Question: What are the most important benefits you seek out from functional-nutrition foods and beverages or nutritional supplements? Respondents who answered "other" are not shown.  
Source: McKinsey Future of Wellness Survey, Nov 2024

McKinsey & Company





02.  
**Top Trends**

# Longevity





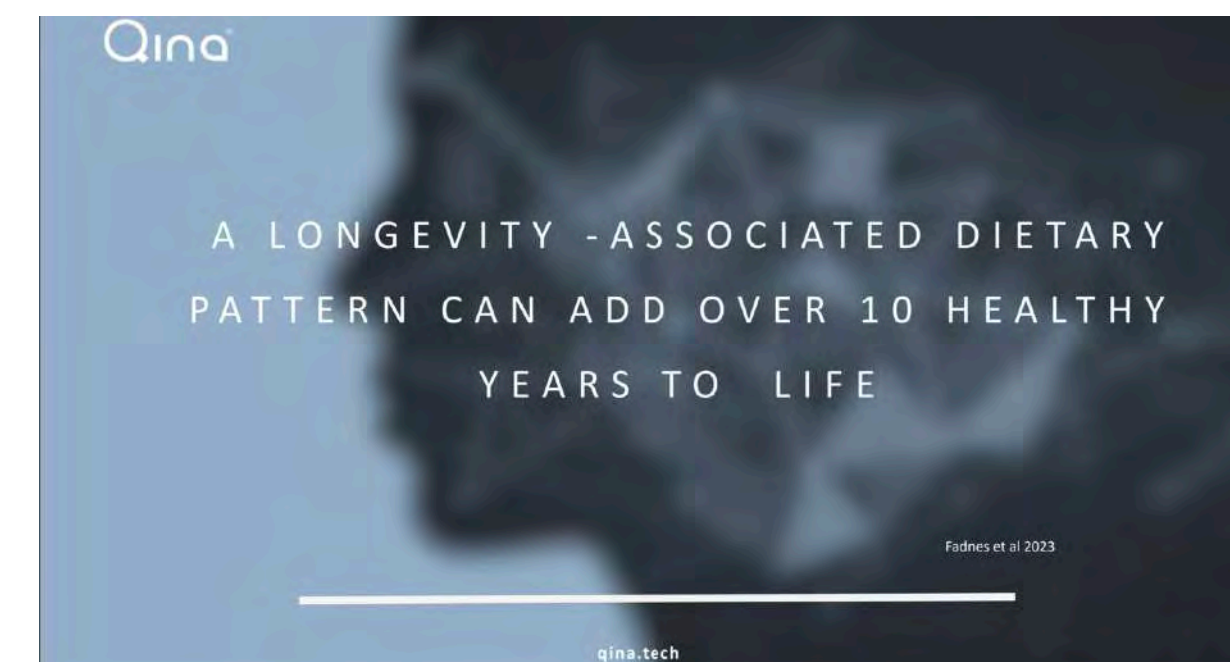
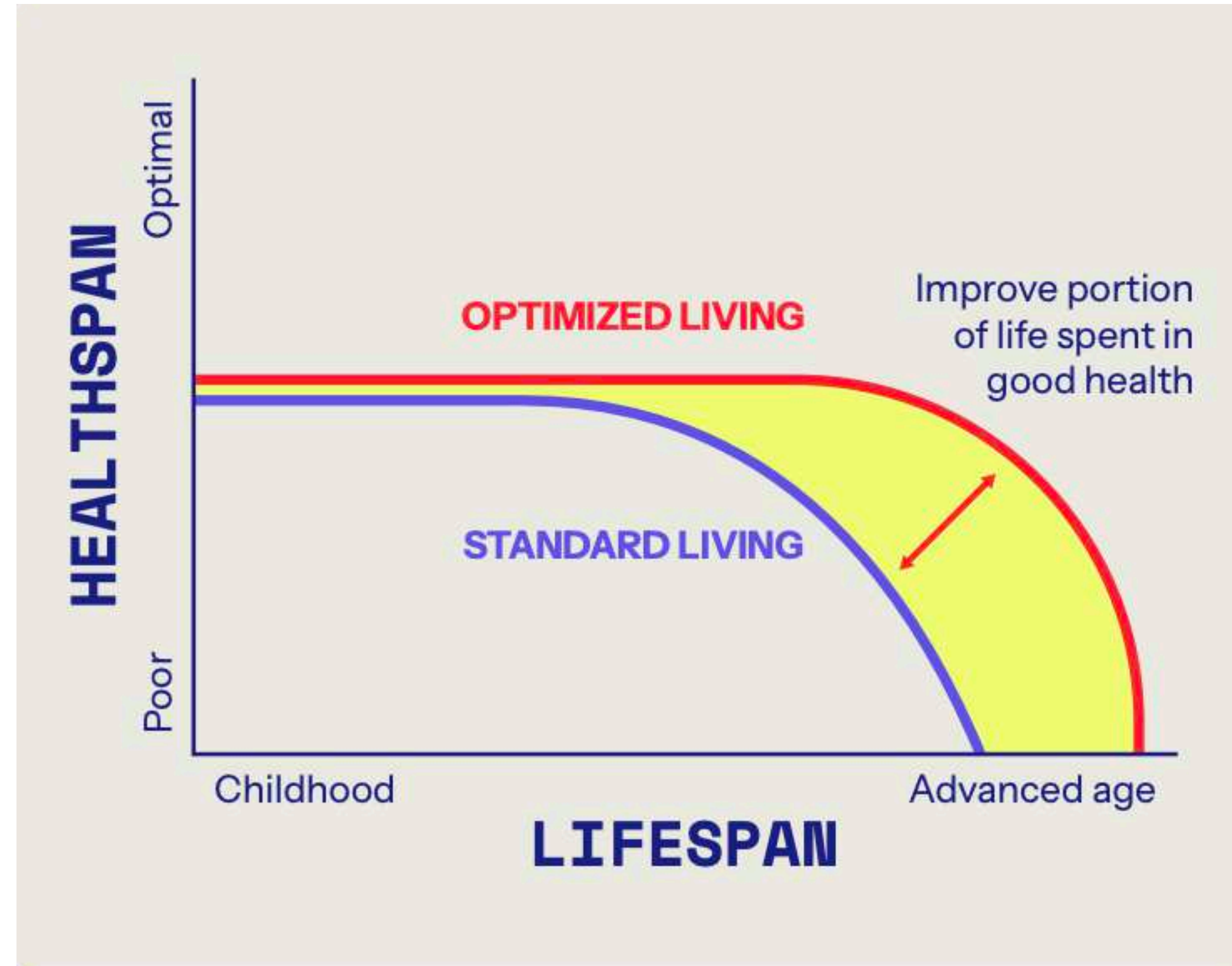
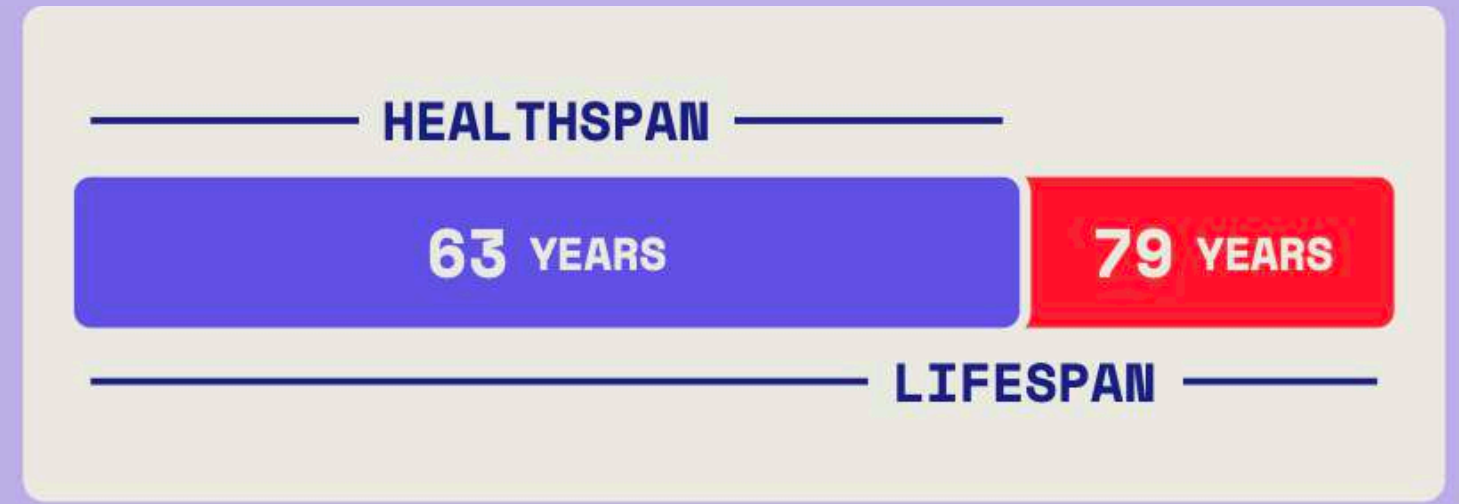
# #01

## Longevity

**Prevent disease & prevent aging through functional nutrition**

- ◆ 60% of global consumers prioritize healthy aging.
- ◆ Preserve one's independence, living a long life, preventing chronic disease and keeping energy
- ◆ Younger generations want energy, focus, and recovery, not just anti-aging.

### THE LONGEVITY CURVE IMPROVING HEALTHSPAN





02.  
**Top Trends**

# Targeted Nutrition





# #02

## Age Specific Nutrition

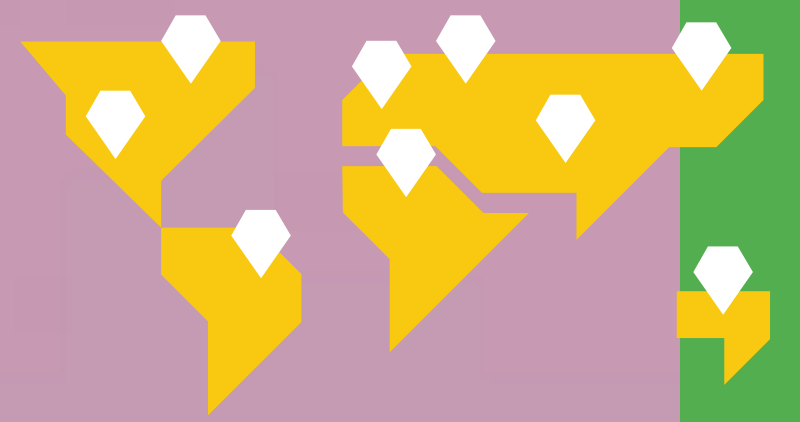
### Preventative Health & targeted nutrition

Health is no longer seen as a short-term goal but a **lifelong task** and nutrition plays a central role. We're seeing a growing wave of products designed to support the body's needs at different life stages, from early development to healthy aging.

Everyday staple foods are being reformulated with functional ingredients to meet the needs of an ageing population.

These **age-targeted foods** help consumers take a **preventive approach** to age-related health challenges by supporting **cognitive function, immunity, energy metabolism, and mobility**.





02. **Top Trends**

# Metabolic Health





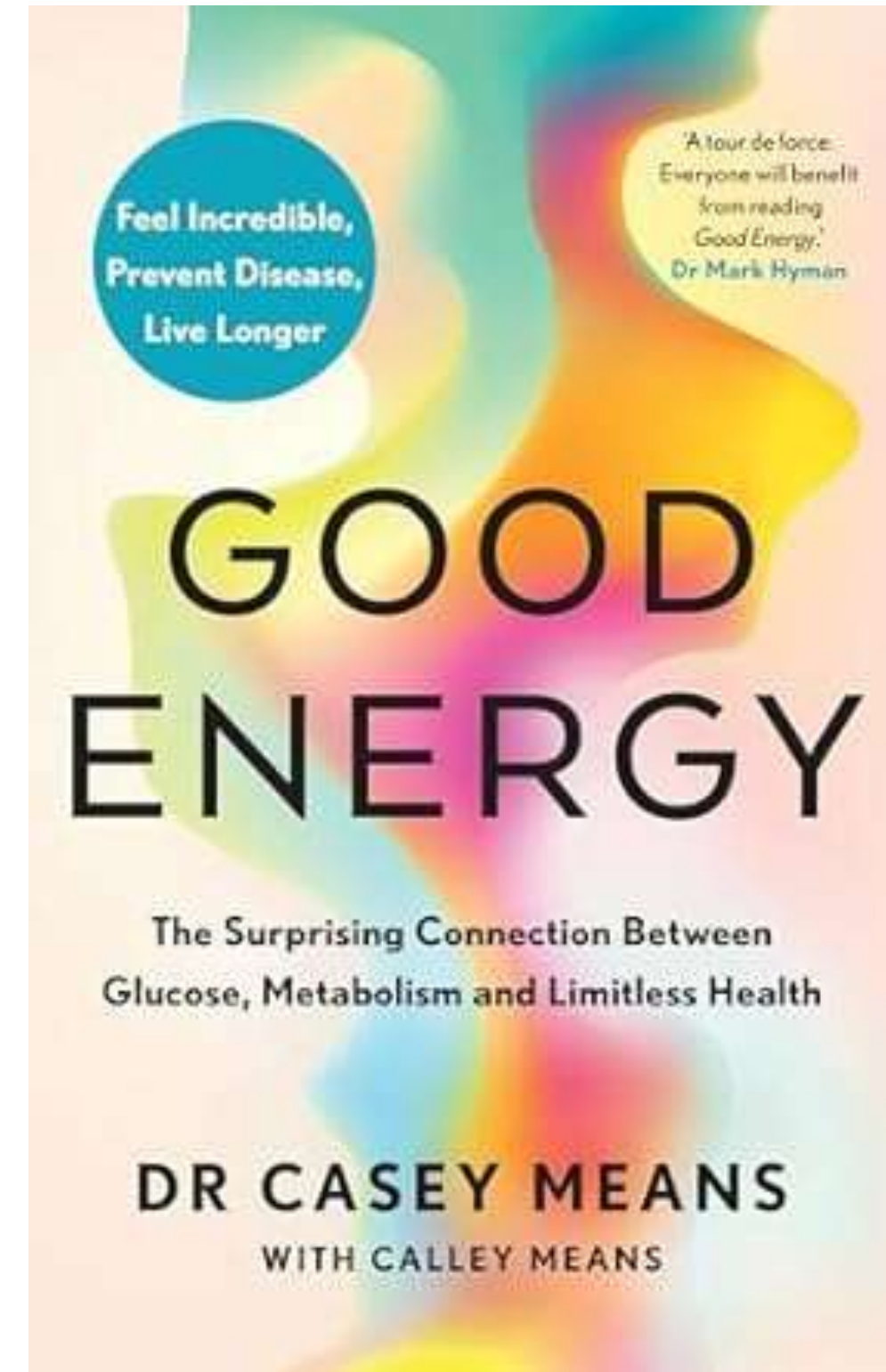
# #03

## Metabolic Health

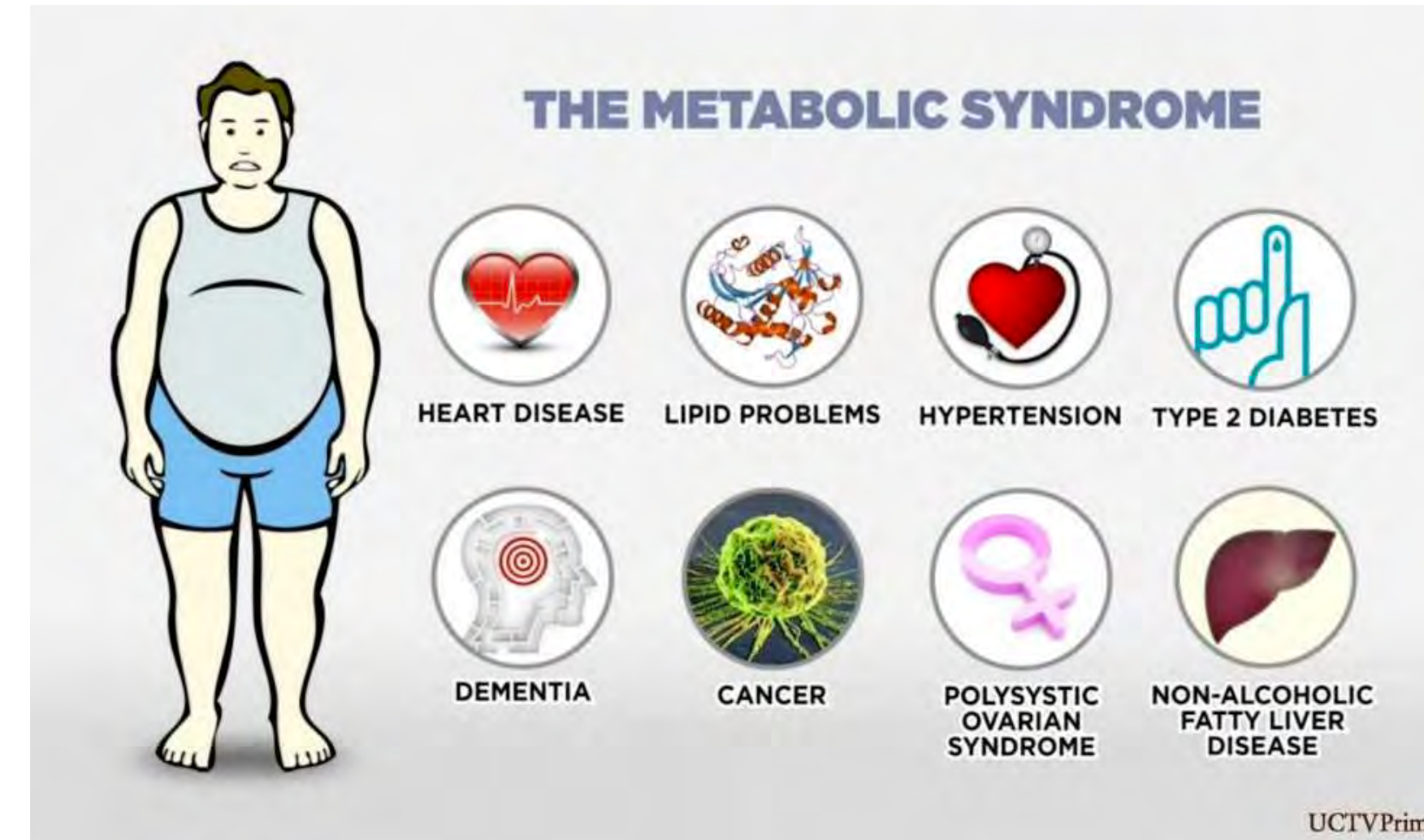
**Cellular health and energy metabolism as the base for overall health**

Most health conditions are symptoms of an underlying metabolic dysfunction.

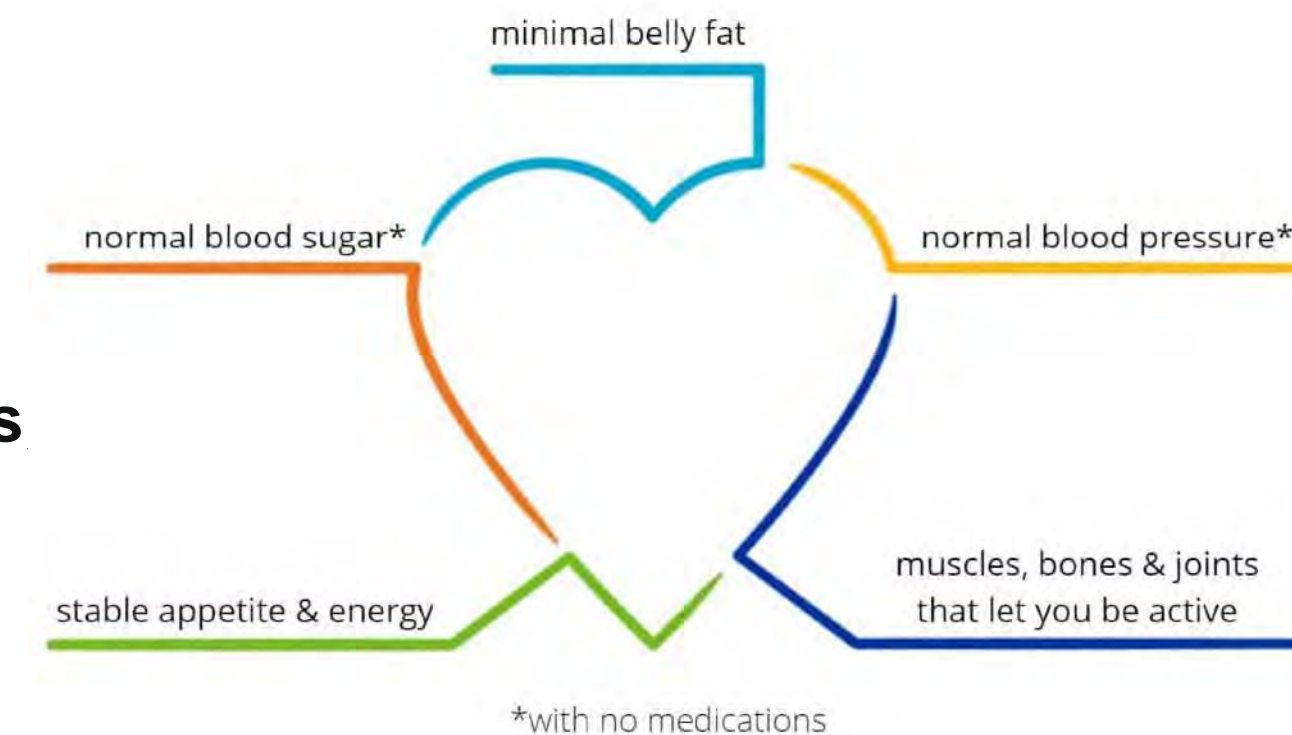
Cancer as a metabolic disease (Otto Warburg, 1920)



**The number 1 New York Times Bestseller: The groundbreaking connection between glucose levels metabolism, limitless health and longevity**



### What is metabolic health?





# #03

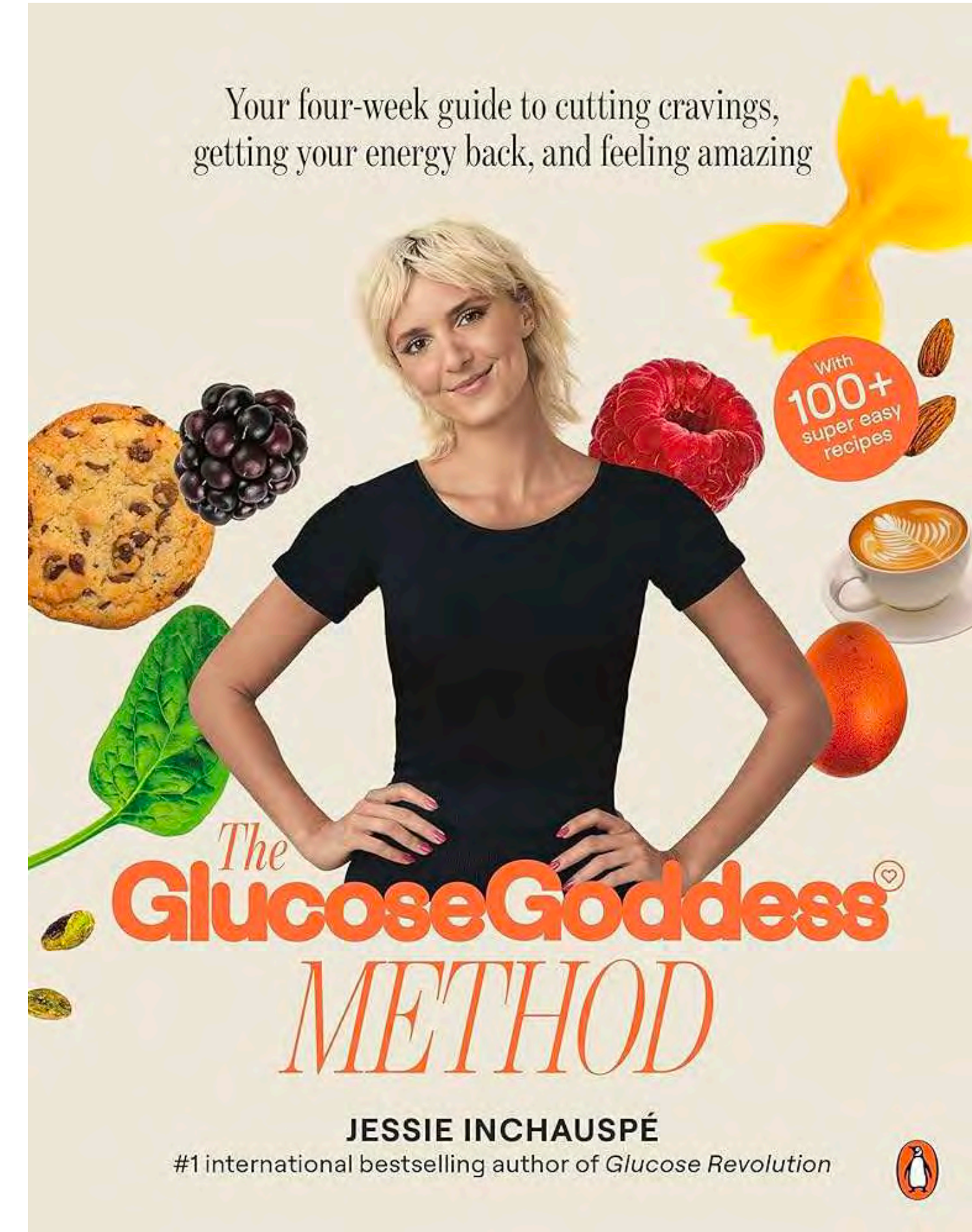
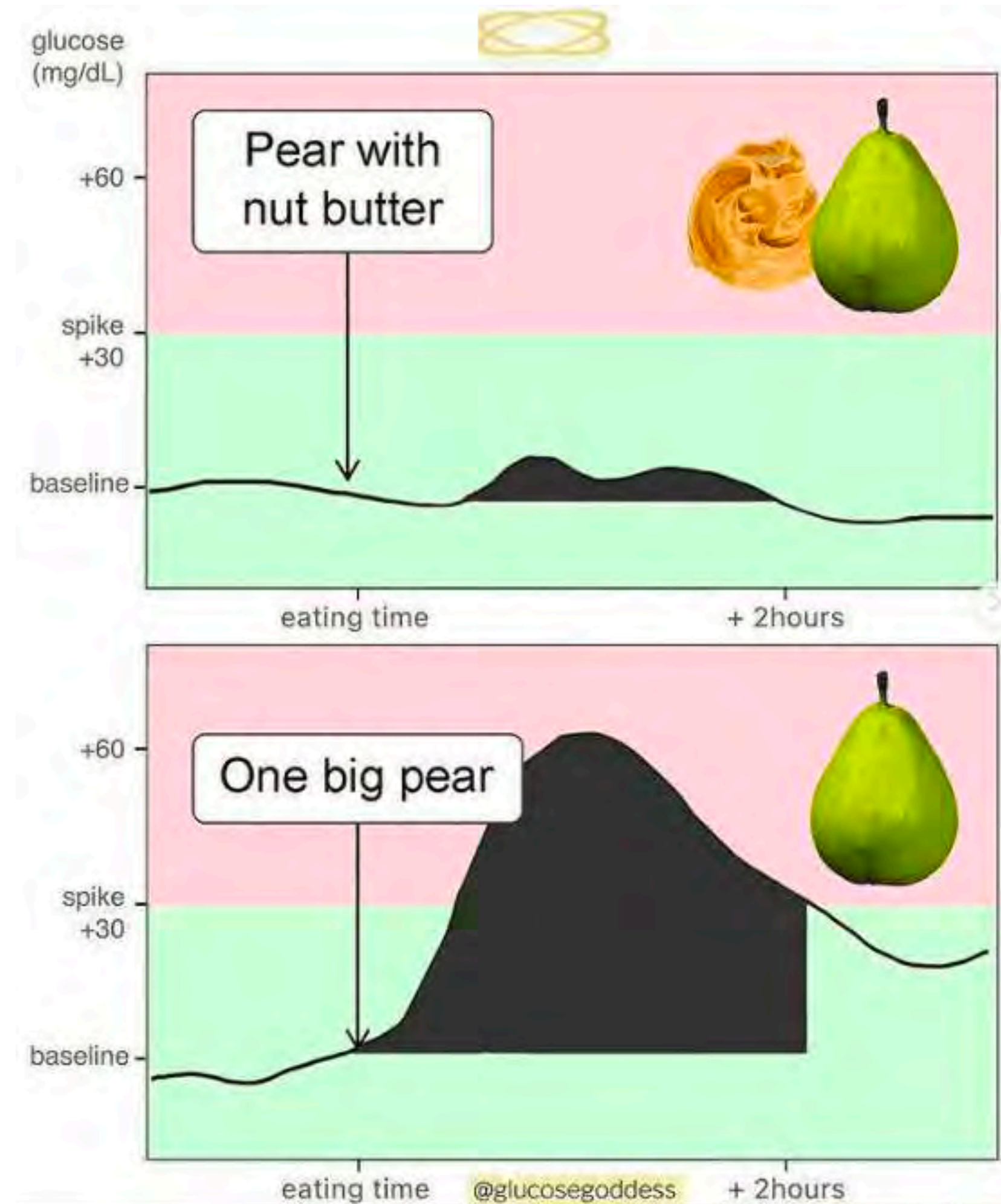
## Blood Sugar control

Of the most prevalent health conditions worldwide

The obesity epidemic is closely linked to diabetes and metabolic disease.

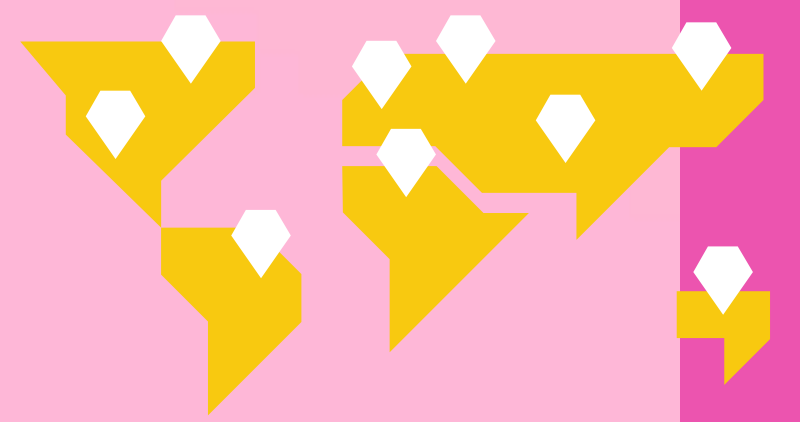
An estimated number of 30-40% of Europeans are pre diabetic (225-300m), 8,8% are diabetic (66m), which makes up **360m people, only in Europe.**

Low Carb, Keto and low GI products are and will be on the rise of the coming years to help consumers cope with overweight, physical and mental health problems.



IG: @Glucose Goddess





02.  
**Top Trends**

# Sugar & Salt reduction





# #04

## Sugar & Salt reduction solutions

Sugar & Salt reduction solutions for better nutritional profiles

- Clean Label
- Low sugar, low carb
- Low sodium
- Sweet Fibers
- Sweet Proteins



02.  
Top Trends

# Protein across the Shelf





# #05

## Protein

### Our bodies building stone

After water, proteins make up the second most abundant component of our bodies (~15–20%) which is directly related to our nutritional needs and daily protein intake.

Since proteins are constantly broken down and rebuilt, a steady intake of high-quality protein sources (like meat, fish, eggs, dairy, legumes, nuts, and soy) is essential to maintain muscle, repair tissues, and support overall health.

This means we must consume enough protein daily to replace what is lost – and the recommendations for the daily intake of protein is increasing – from 0,8g per kg to 2g per kg bodyweight.



Building a ton of protein in here!!  
 Baby is about 50% protein at birth  
 (excluding water)

- ◆ **42% of consumers globally** consider protein to be the most important ingredient (Innova)
- ◆ **Nearly 80%** of consumers believe eating more plant-based proteins will “help me age better” (ADM)
- ◆ **61%** of consumers **increased protein** (Cargill’s 2025 Protein Profile)





# #05

## Protein Across the Shelf

Consumer's favorite macronutrient for health credentials

Protein has evolved from niche sports nutrition to mainstream grocery aisles, with innovative brands adding high-quality proteins to everyday foods like bread, chips, dairy and snacks

High protein diets are popular because consumers perceive protein-rich foods as healthy due to their association with muscle building, satiety, overall well-being and weight management/ loss.





# #05

## Protein+

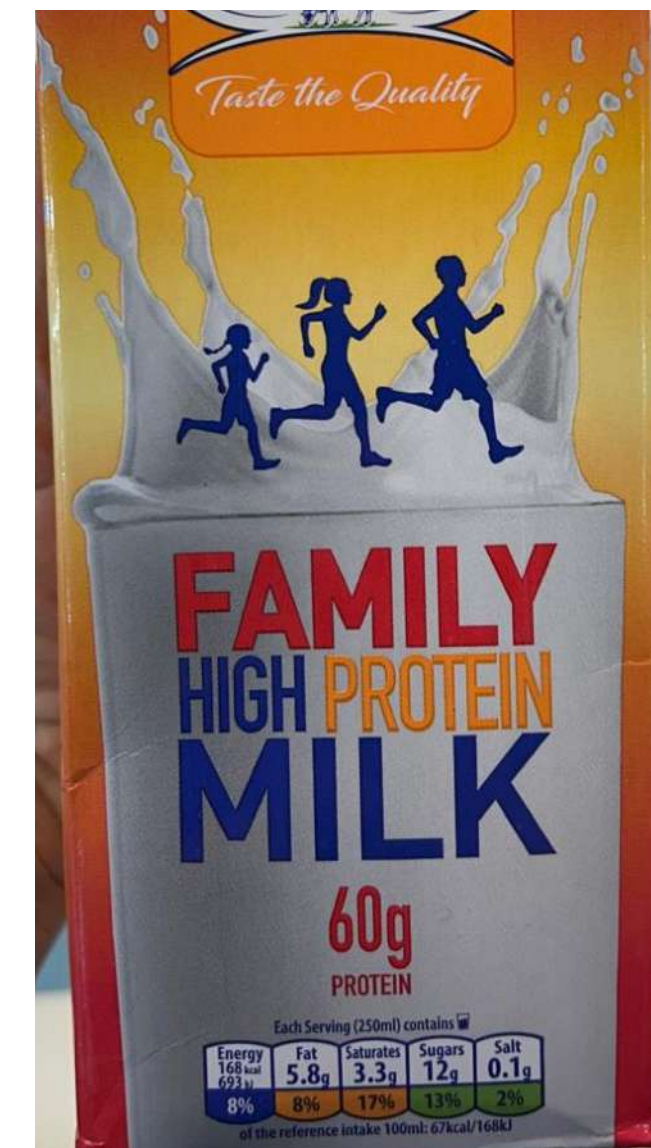
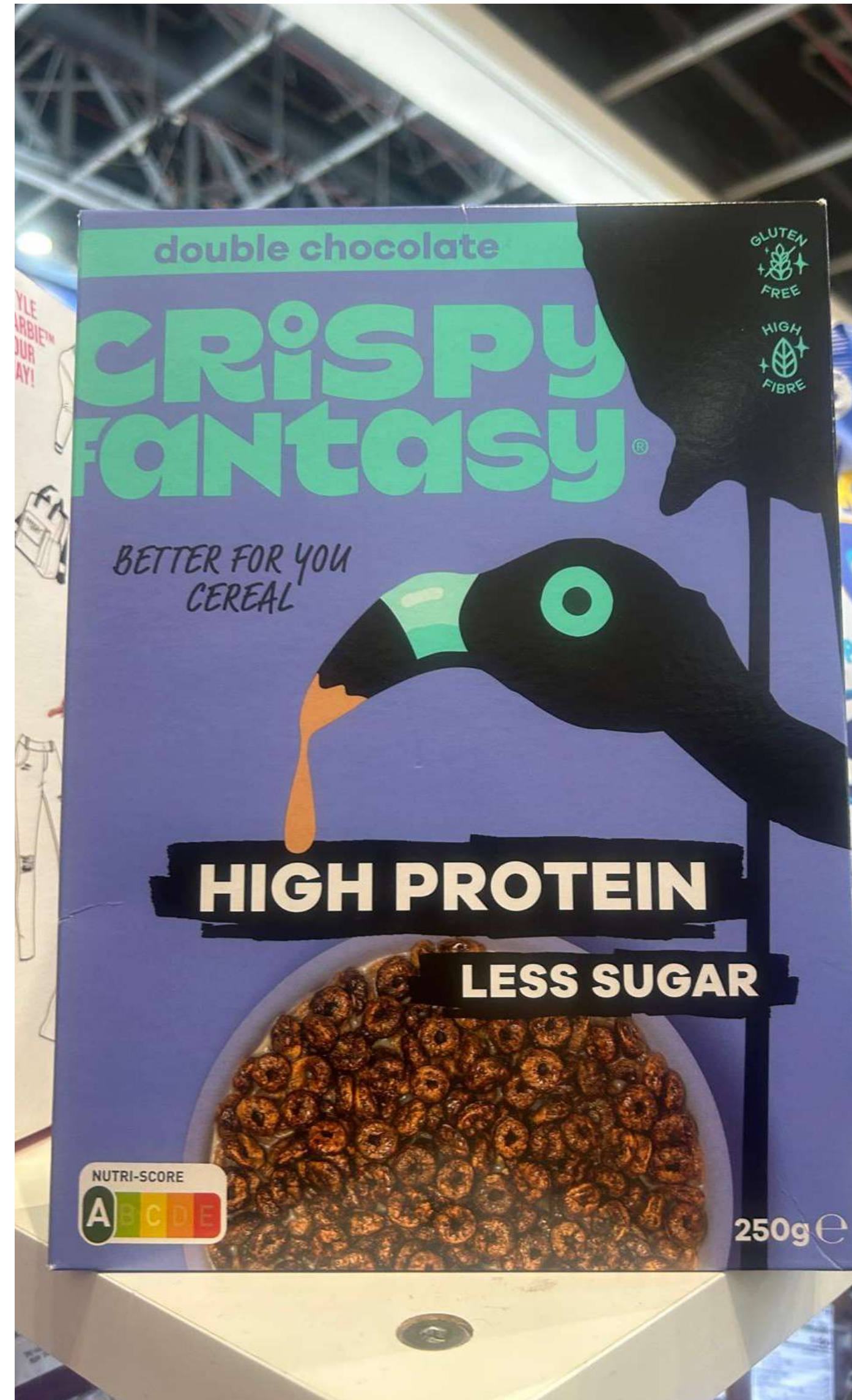
### How to win the protein battle?

Protein is the trending macronutrient in 2025 but protein alone is not enough to create a differentiated product.

In order to appeal to conscious consumers looking closely at labels, innovations are focused on adding extra nutrients or other beneficial components like **vitamins, minerals, or other wellness-oriented features** to enhance their appeal and functionality.

Quality, taste and bioavailability, i.e. through BCAAs starts to play a role.

**Frequent + claims:** gluten free, low sugar, low carb, fiber, Omega 3, BCAAs





02.  
**Top Trends**

# Beauty





# #06

## Beauty

Collagen, Hyaluronic Acid and fiber

Beauty is expressed by the skin, hair & Nails, so cosmetic ingredients like Collagen and hyaluronic Acid are main ingredients in Europe

In Asia, beauty is seen more holistically and starts in the gut with fiber.

Also filling konjac beverages are targeting consumers to feel full longer with a beverage.





02.  
**Top Trends**

# Gut Health 2.0





# #07

## Gut Health

### Gut-brain axis and connection to mental health

50% of the population suffer from digestive disorders, we need to feed our microbiome for optimal health

- ◆ Better digestion & absorption of nutrients
- ◆ Less bloating & more regularity
- ◆ Stronger Immune System



Probiotic drinks market is expected to reach \$23.4 billion in 2031, growing at CAGR 6.6% (2022-2030)



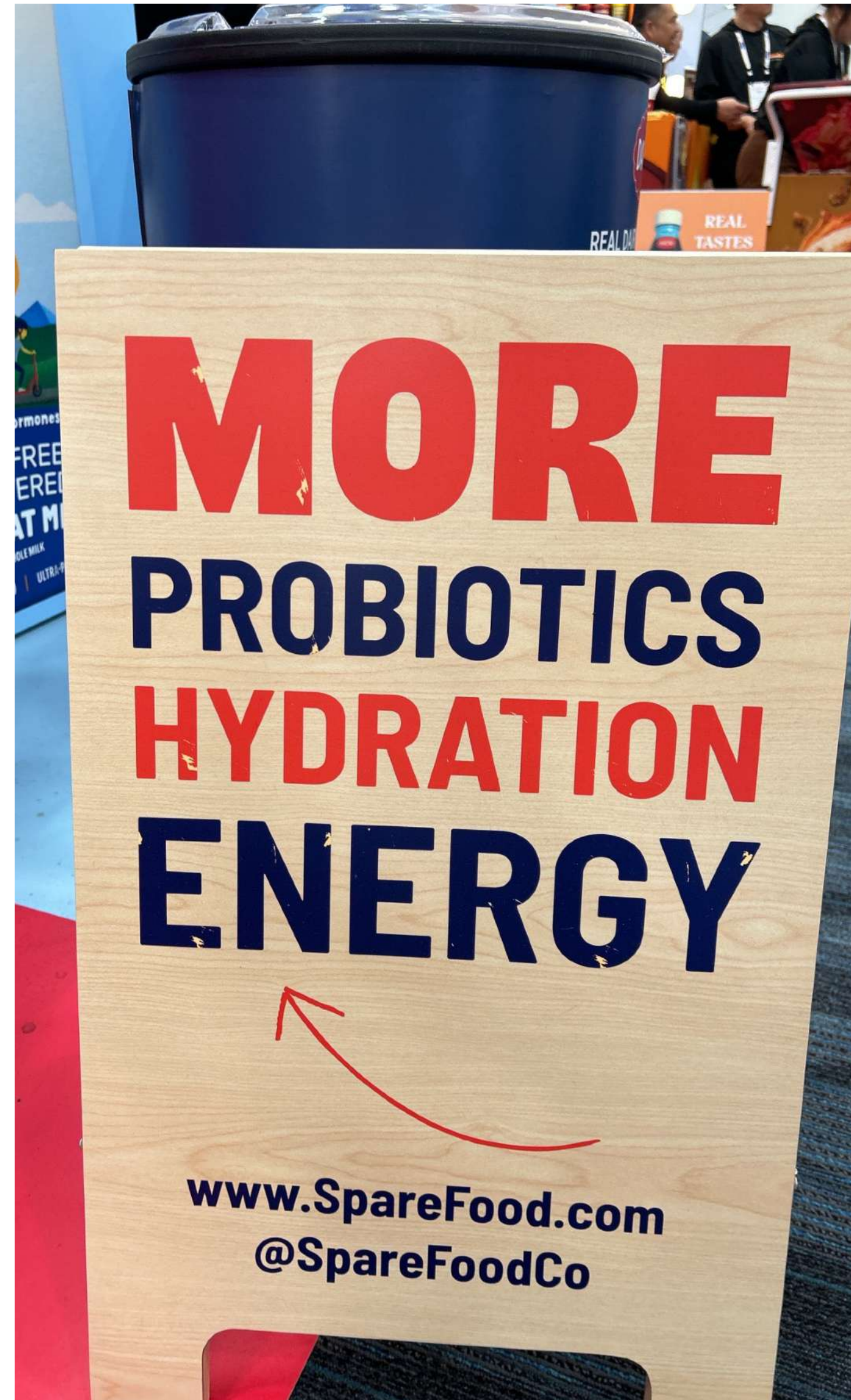
# #07

## Gut Health 2.0

### Health starts in the gut

Modern lifestyle factors (poor diet, antibiotics, stress and poor sleep, lack to exposure to nature) reduce microbial diversity – causing short term digestive issues (40-50% of population) and long term effects like inflammation, obesity, diabetes, allergies, autoimmune and mood disorders.

Diversity and quantity of good microbes matters – ingredients range from pro, pre, postbiotics to fibers and resistant starches, minerals.





02.  
**Top Trends**

# Brain health





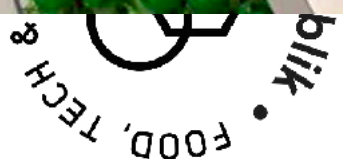
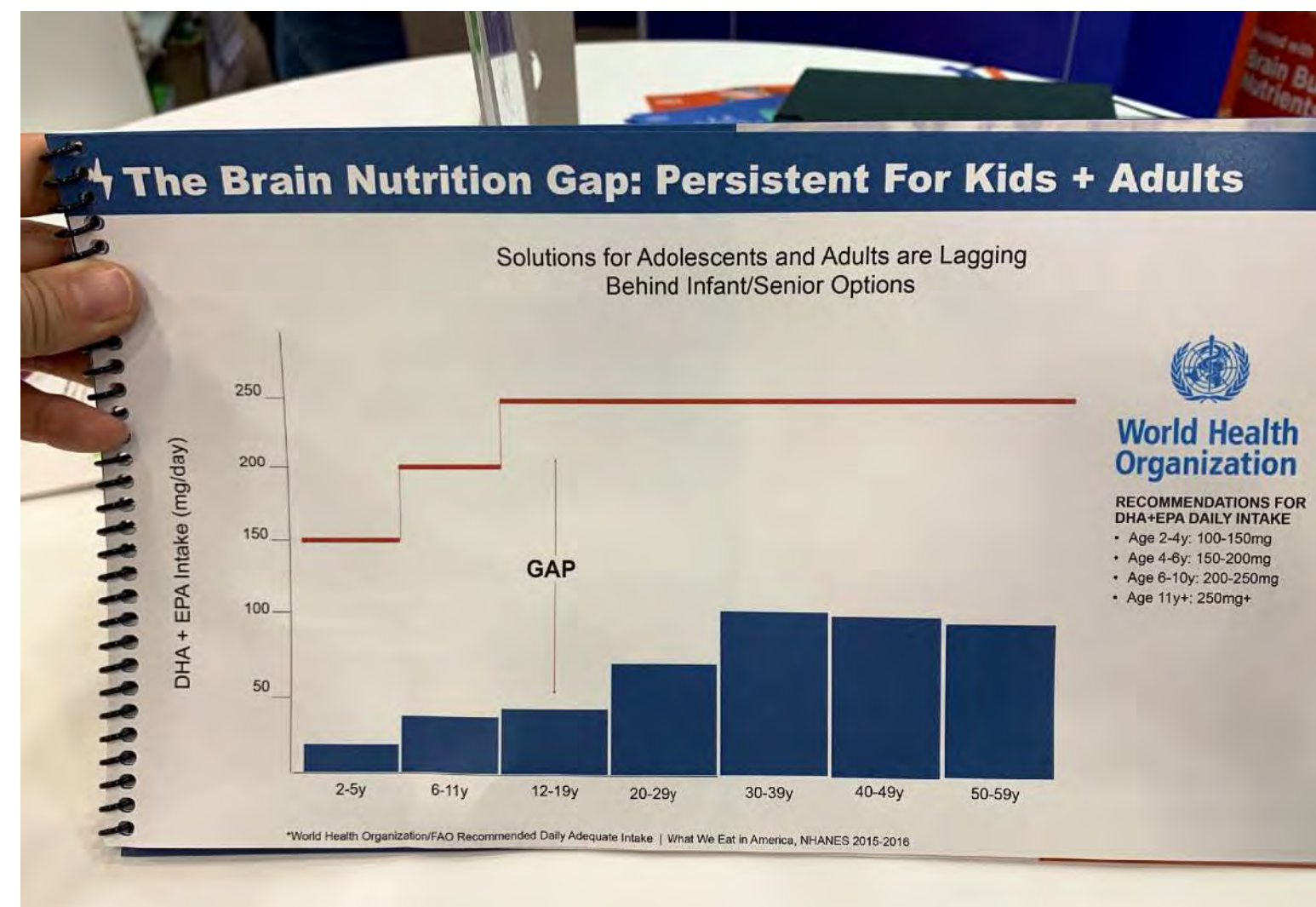
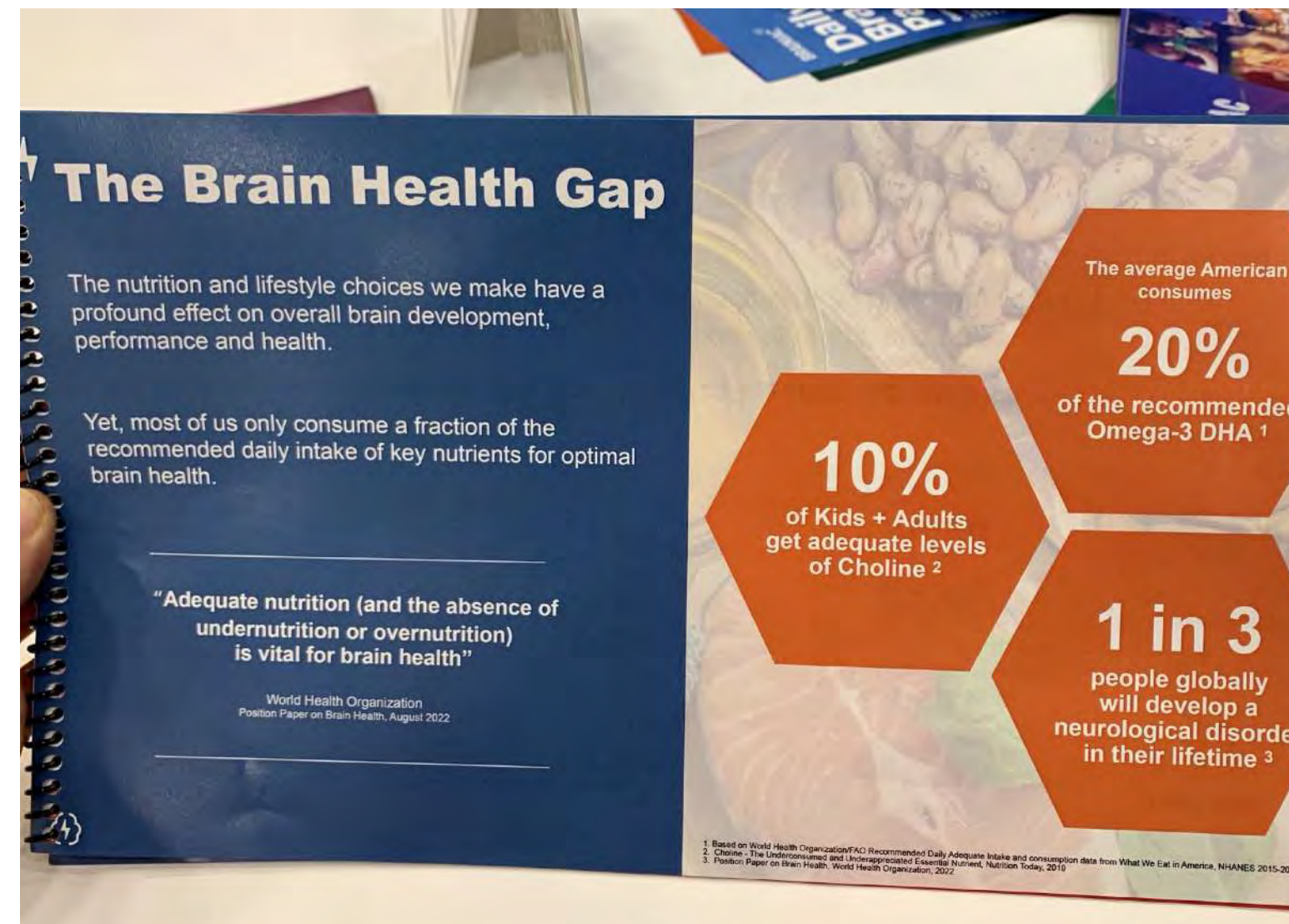
# #08

## Brain health

Cognitive nutrient support during growth and maintenance.

The cognitive health supplement market is estimated to attain a CAGR of 13.3% to reach a valuation of US\$ 16.8 billion by 2033.

- ◆ **Cognitive performance** = Focus & memory
- ◆ **Mental wellbeing** = mood
- ◆ **Stress Relief** = Relaxation & Sleep





05.  
**OPPORTUNITIES**

# Cognitive Performance

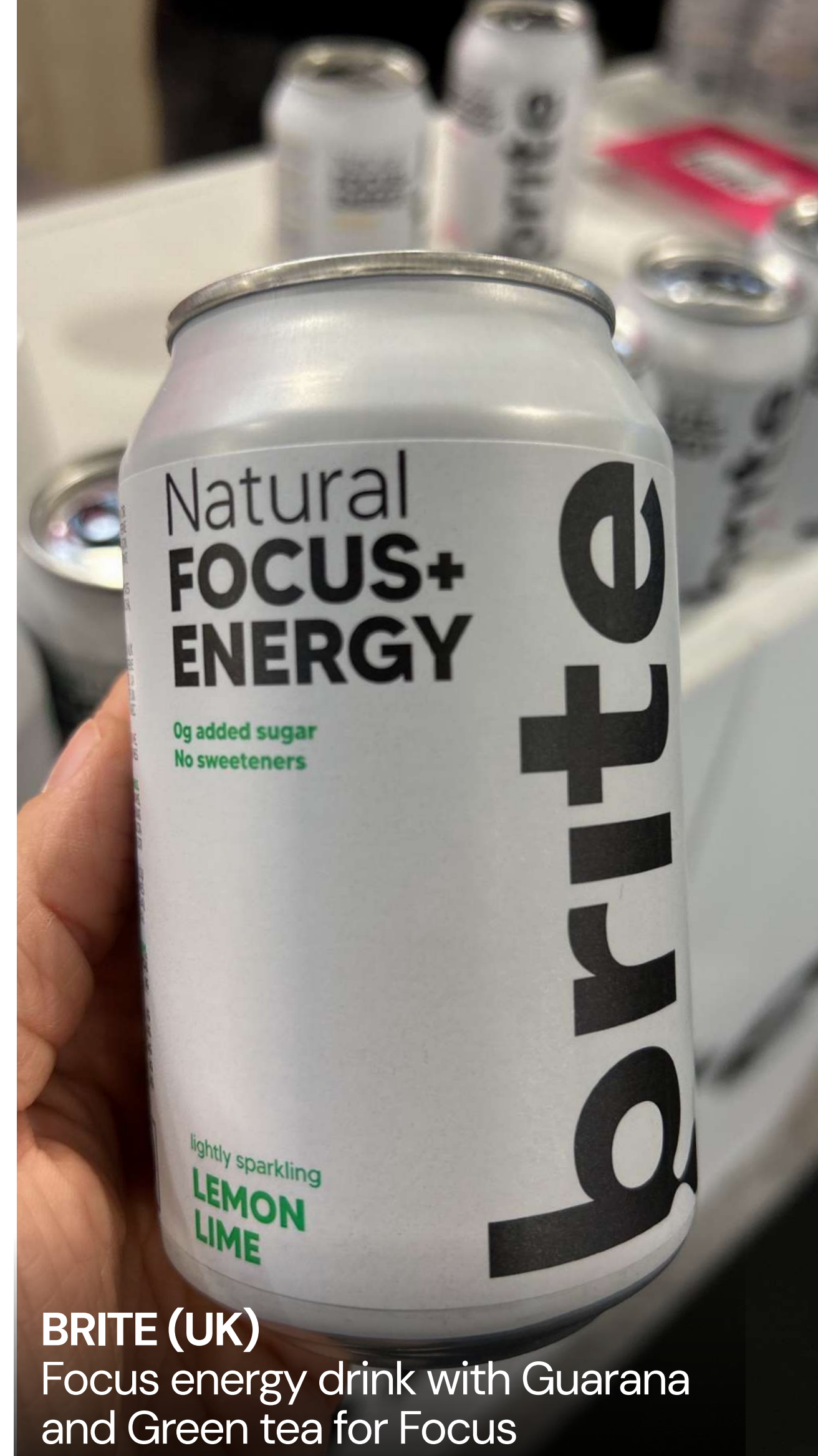


# #08

## Focus is the new energy

Cognitive Performance.

- ◆ Fueling **mental performance** to live in a demanding environment
- ◆ **Natural stimulants:** Ginseng, Guarana, natural Caffeine, L-theanine, Ginko Biloba,
- ◆ **Mushrooms:** Lion's Mane, Cordyceps



**BRITE (UK)**  
 Focus energy drink with Guarana and Green tea for Focus



**MAGIC MIND (US)**  
 Functional shot with nootropics, adaptogens, mushrooms, caffeine and vitamins for mental performance



**STARBUCKS (US)**  
 Double shot Coffee with B Vitamin, Ginseng and Guarana to support focus



05.  
**OPPORTUNITIES**

# Mood Enhancers



# #08

## Mood enhancers

76% feel stressed and anxiety

Mental health is made tangible with relaxing benefits

- ◆ Mood enhancing ingredients: Magnesium, Cacao (teobromina), ashwangandha, GABA





05.  
**OPPORTUNITIES**

# Relaxation & Sleep



# #08

## Relaxation & Sleep

Sleep problems affect 30%–70% of older adults worldwide

Antidotes to stress and improving quality of sleep

- ◆ CBD
- ◆ Ashwaghandha
- ◆ Magnesium
- ◆ Lemon balm, chamomile
- ◆ GABA





02.  
**Top Trends**

# Hydration



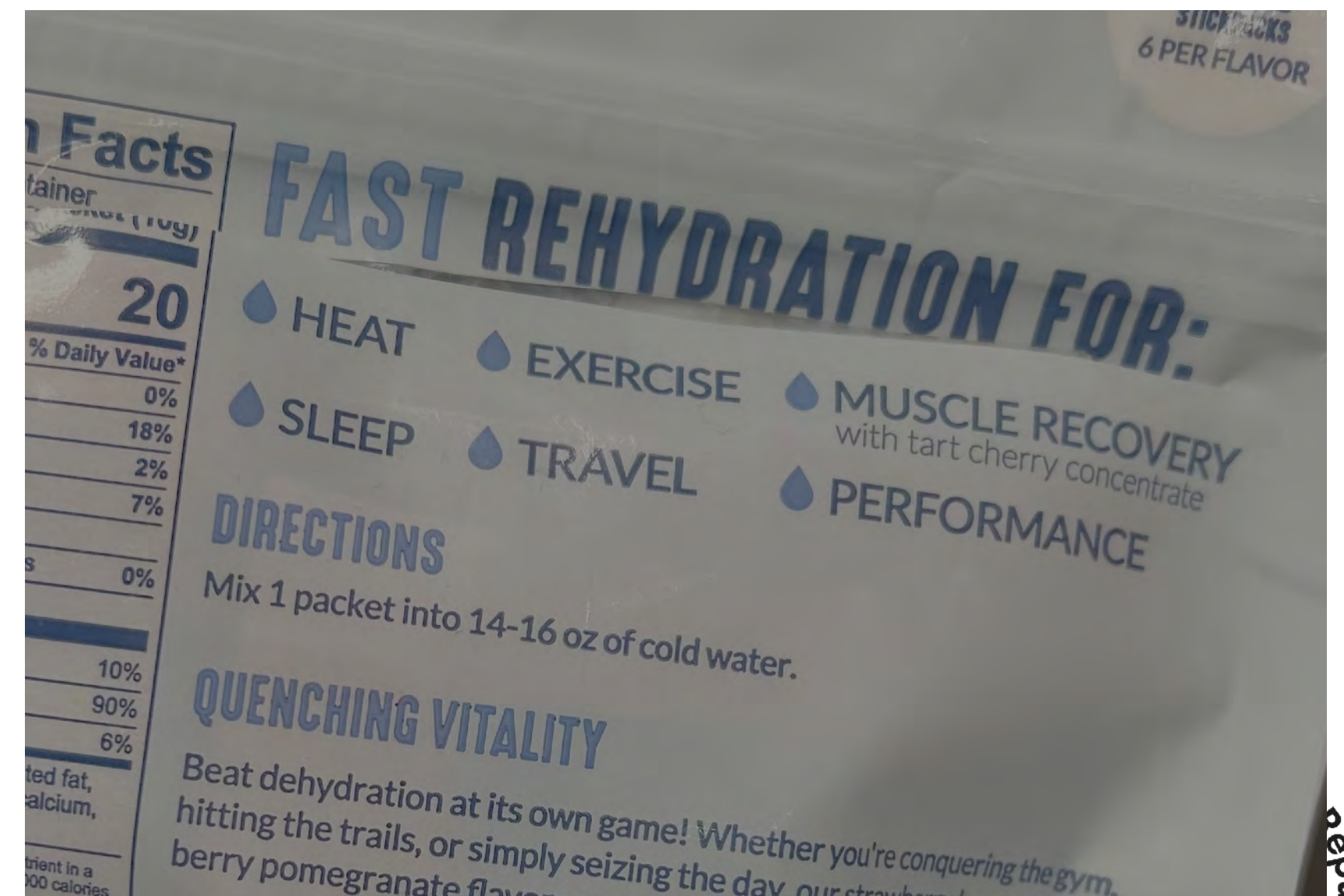
# #09

## Hydration Beverages

Global demand for electrolyte and mineral beverages is increasing

Rising health awareness among people regarding hydration and maintenance of the electrolyte balance, increasing sports and fitness activities are fueling the sales of electrolyte beverages.

The global electrolyte drinks market size was USD 40.32 billion in 2023, calculated at USD 42.62 billion in 2024 and is expected to reach around USD 74.19 billion by 2034, expanding at a CAGR of 5.7% from 2024 to 2034.





02.  
**Top Trends**

# Sexual Health





# #10

## Sexual Health

Enhancing vitality and desire

Sexual health and performance becomes part of the overall health strategy.

At Gulfood we see a range of supplements specifically designed for men or women to enhance sexual performance in men and boost libido in women, combining energizing and stimulant ingredients.

For men, they improve stamina, circulation, and endurance with Ginseng, Ginger, Taurine, and Caffeine, supporting vitality and performance. For women, they enhance libido and sensitivity, promoting hormonal balance and circulation while reducing stress





02.  
**Top Trends**

# Seed oil free





# #11

## Seed oil free

### Healthier alternatives to inflammatory seed oils

The world of cooking fats and oils is undergoing a major shift driven by health-conscious consumers and culinary innovators

A notable trend is the rising aversion to seed oils (like soybean, corn, and canola) due to their high omega-6 content, intensive processing, and potential inflammatory effects.

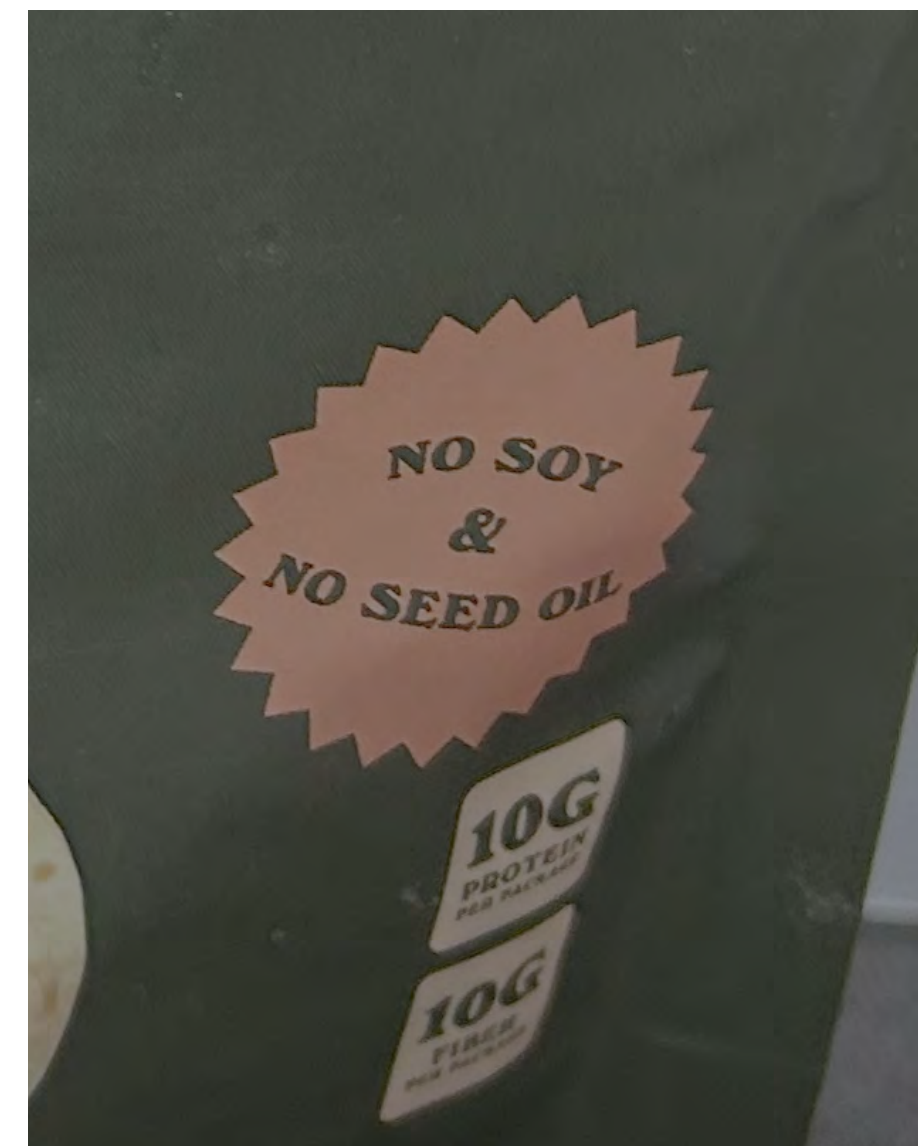
Consumers are increasingly embracing alternative fats perceived as natural, nutrient-rich, and stable under high heat.

**Avocado oil** is gaining popularity for its neutral taste, high smoke point, and heart-healthy fats.

**Extra virgin olive oil (EVOO)** maintains its prominence with antioxidants, traceability, and association with clean eating in the Mediterranean diet.

**Traditional animal fats like tallow and lard** are experiencing a revival, prized for their minimal processing, abundance of fat-soluble vitamins, and avoidance of industrial extraction methods used in seed oils.

These trends reflect a broader shift toward simplicity, authenticity, and health-oriented choices in cooking fats, emphasizing natural origins and traditional dietary wisdom.





01.  
Top Trends

# Performance Superfoods





#12

# Performance Superfoods

Mushrooms, botanicals and Ayurvedic herbs

For a better performing body & sharper mind, consumers are looking to incorporate new superfoods into their daily Diets.

FORMATS: supplements, gummies, powders, or functional coffees.

- ◆ Ashwaghandha
- ◆ Functional Mushrooms
- ◆ Ginseng
- ◆ Tumeric
- ◆ Cacao
- ◆ Moringa
- ◆ Shilajit





02.  
**Top Trends**

# Private Label Innovation





# #13

## Protein Foods

### Private Label Innovation Series

Protein is invading all product categories making a statement as a “better for you” option in snacks, granolas, dairy, snack bars, etc.

Consumers consider protein as filling and good option for weight management – in a way it’s the new “light” across all product categories.



**ALBERT HEIJN (NL)**  
Protein range: dairy, pancakes, cereals, ice cream, rice waffles



**CRAI (IT)**  
High protein granola, dairy, pasta, bars, ice cream and lentil puff cakes.



**ALDI (UK)**  
Protein shakes, RtD coffee, pancakes, seasoned meat (skewers, steaks,

**CARREFOUR (FR)**  
High protein range with ready meals, pasta, dairy and dessert





# #13

## Sports Nutrition

### Private Label Innovation Series

Sports nutrition is going mainstream at Aldi and Auchan - with protein rich foods and whey and amino acid supplements.

Protein, Hydration and Energy are benefits that go beyond the high performance niche and are attractive for athletes and gym goers.

Protein coffee is extremely successful in Germany.



#### ALDI (GER)

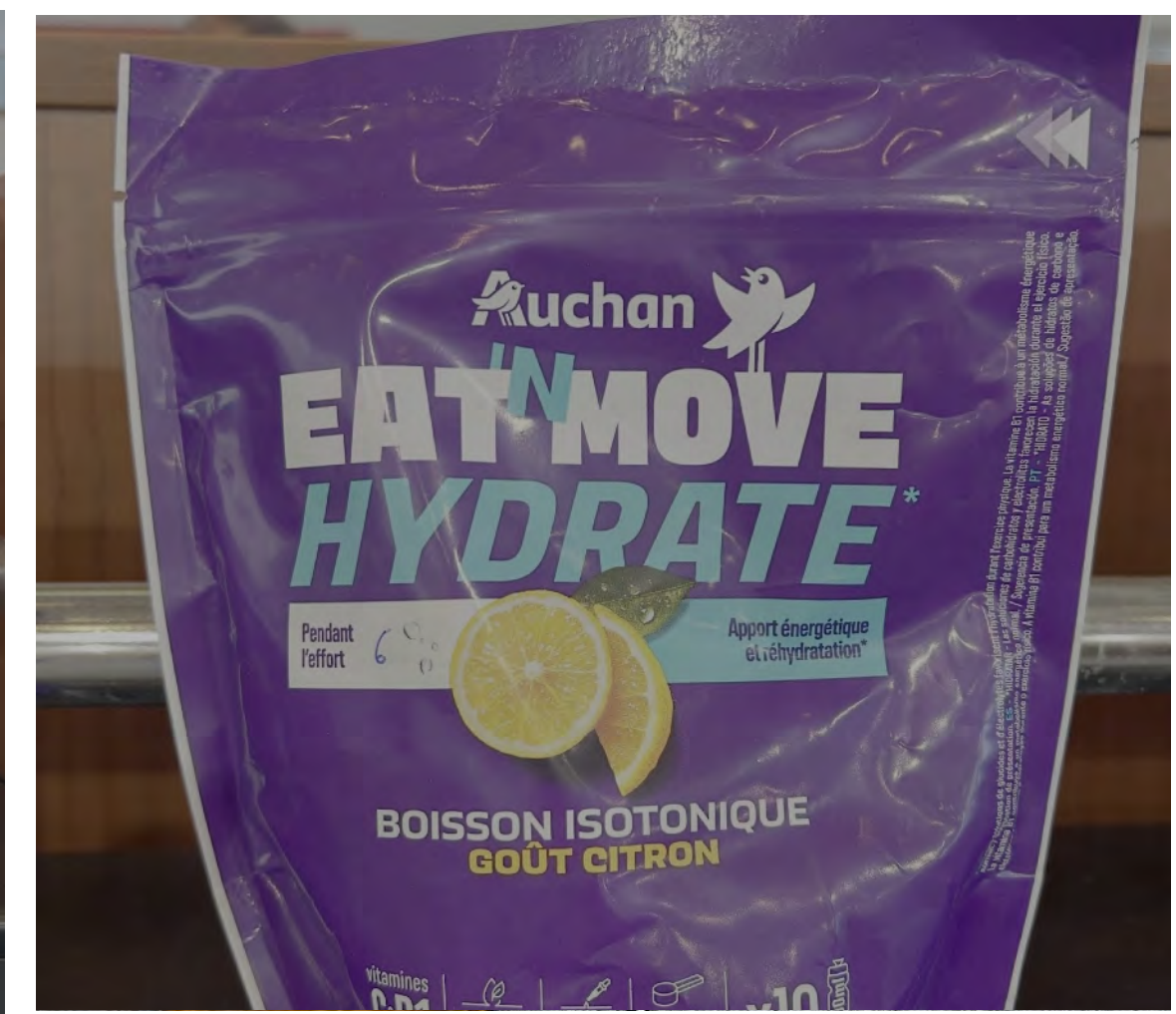
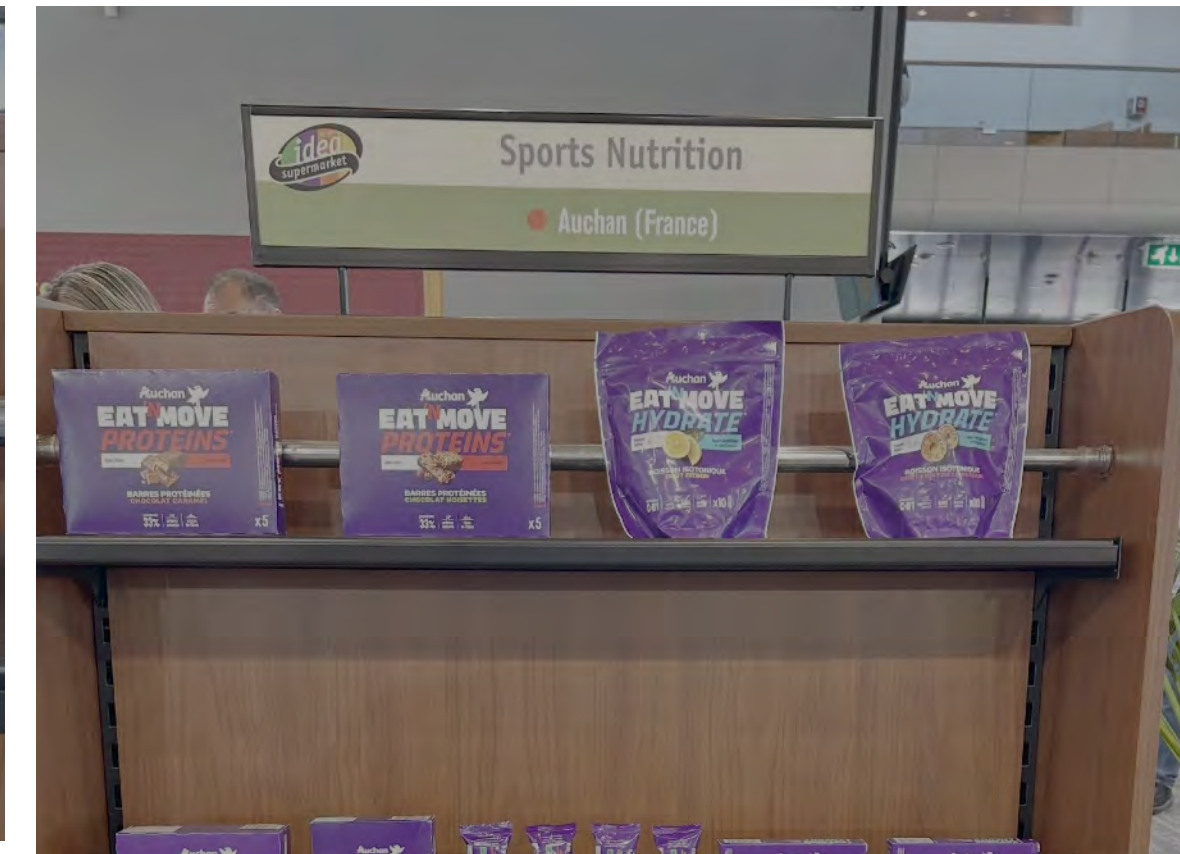
The Aldi Sports series features: protein balls, protein coffee, protein and low carb bars, whey protein, clear whey protein and Amino acids.

PLMA 2025



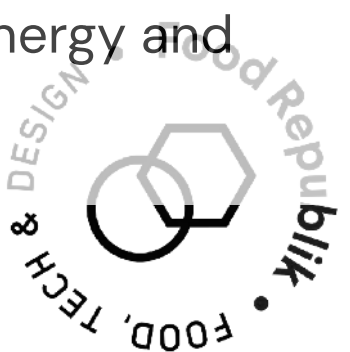
#### ALDI (GER)

Whey protein balls and protein cookies  
Protein coffee with milk protein.



#### AUCHAN (FR)

Auchan features high protein, energy and hydration benefits.





#13

# Functional Foods

## Private Label Innovation Series

### Age specific nutrition and functional benefits through superfoods.

Holland & Barrett presents trail mixes, cereals and superfood blends with specific benefits such as **gut health** – through added fiber (Chicory inulin), calcium and friendly bacteria – **energy support** through natural caffeine, Cordyceps, Ginseng, B Vitamins and iron – **hormone support** through iron, magnesium and Vitamin B6 – **skin, beauty and joint support** through vegan collagen, Irish moss, tremella mushrooms and mitoheal – **brain health** through lion's mane, brainberry, haskap berries, Gingko Biloba, zinc and Vitamin B5.

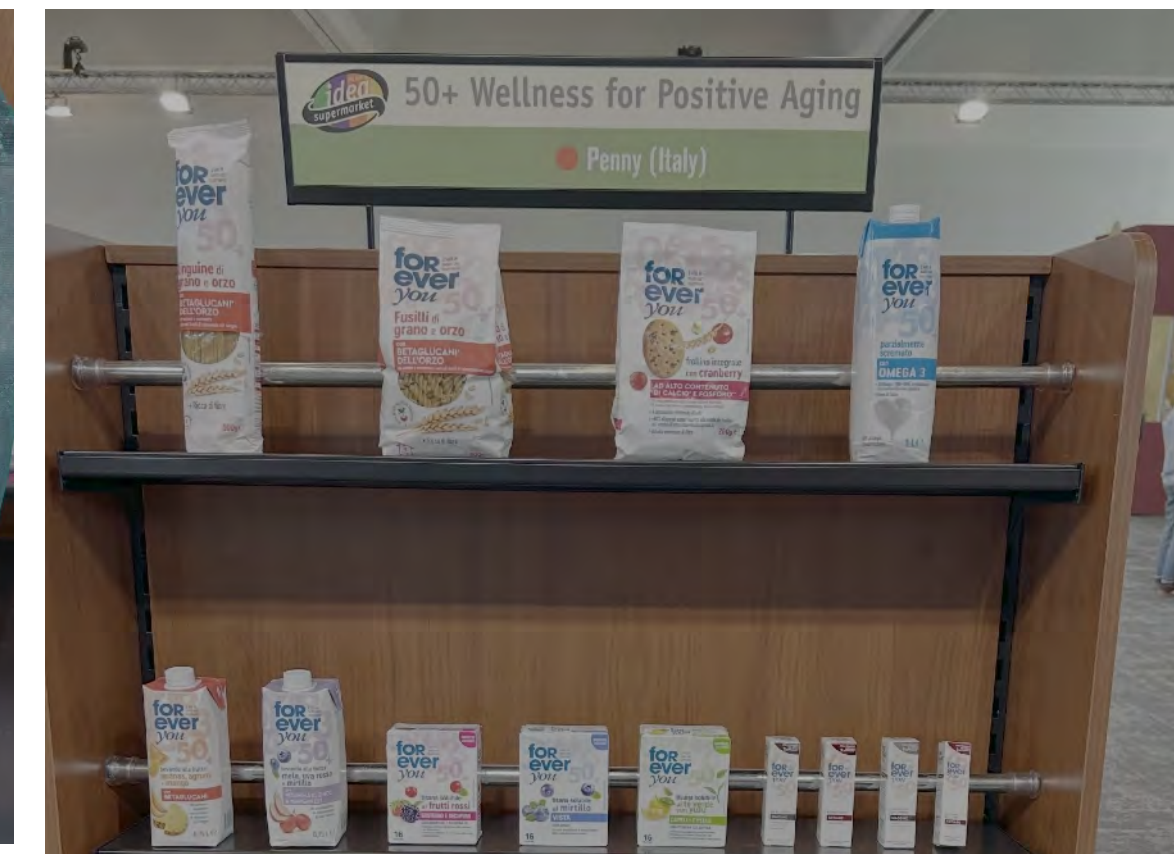


**HOLLAND & BARRETT (UK)**  
 Trail Mixes and muesli with “benefits”, superfood blends with specific benefits (beauty, joints, bones & muscles, brain health)

PLMA 2025



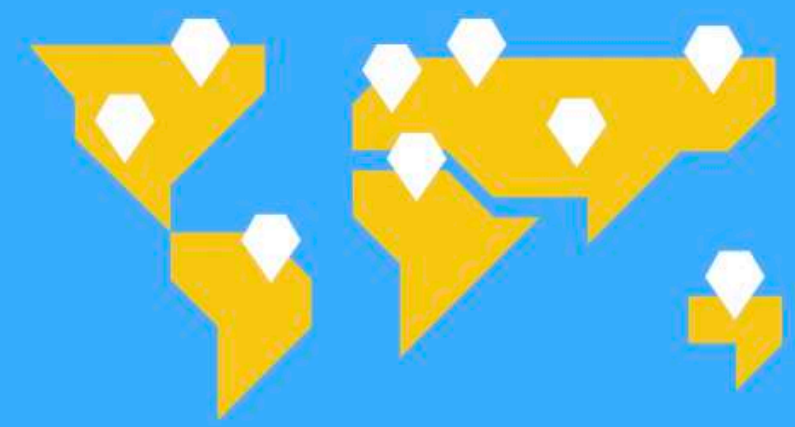
**HOLLAND & BARRETT (UK)**  
 Superfood blends with “benefits”, source of vitamins, magnesium and protein.



**PENNY (IT)**  
 50+ Wellness for positive aging range including pasta, plant milks, cookies high in betaglucans, omega 3, calcium and phosphorus

Food Scouting Innovation Updates





02.  
**Top Trends**

# Health & Fun



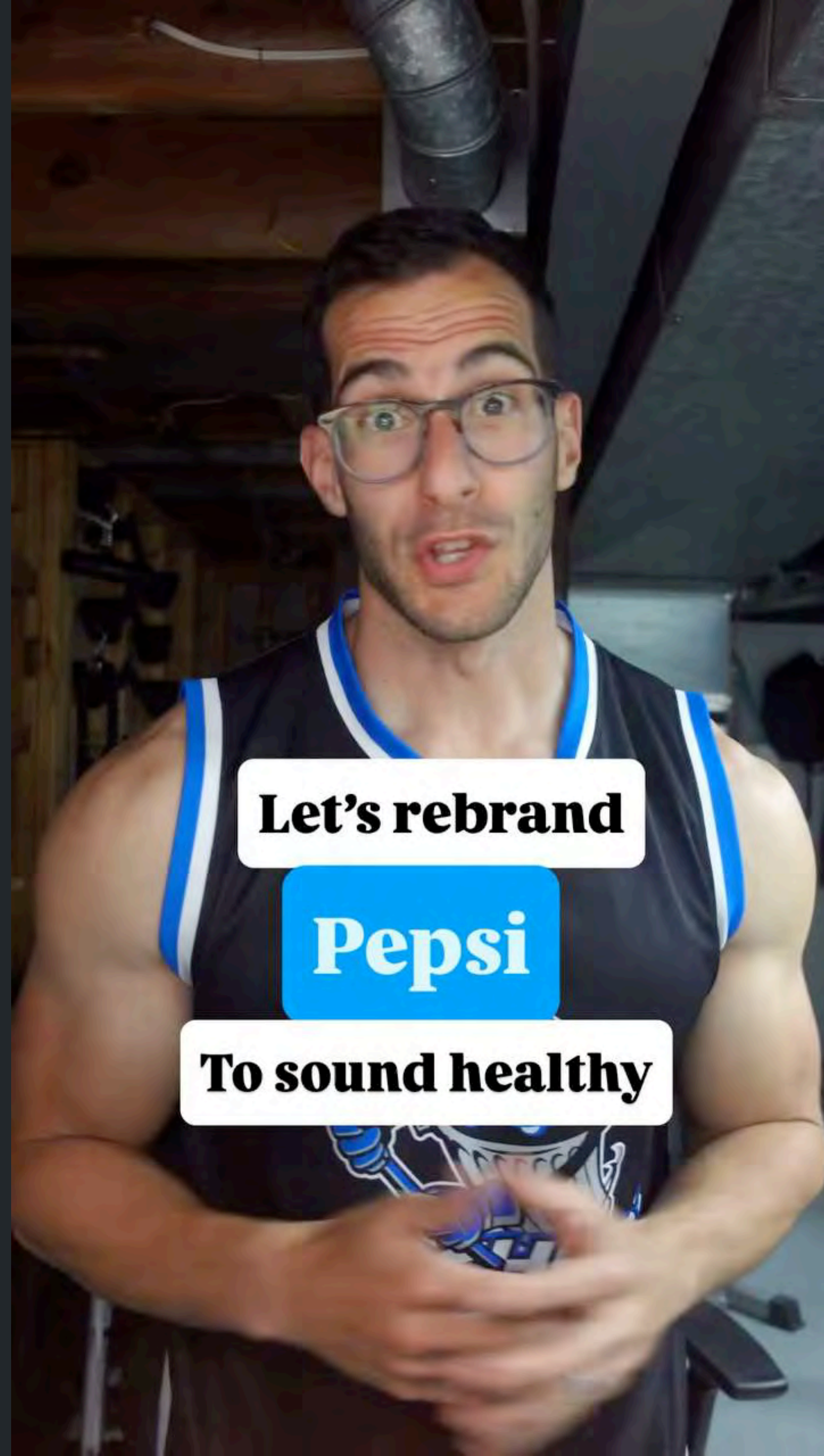


02.  
Top Trends

# Branding Health Products



# Estrategias para “sanificar” tu producto



 **cheatdaydesign**  · Following  
Original audio

<https://www.instagram.com/cheatdaydesign/reels/>





# #14

## Branding Healthier Indulgence

Indulgent foods reimagined – healthy

- ◆ Naming: Honey Child Power Pops
- ◆ Less than 100 calories
- ◆ Dairy free
- ◆ Omega-3s from flax
- ◆ Prebiotic fiber
- ◆ Plant based protein



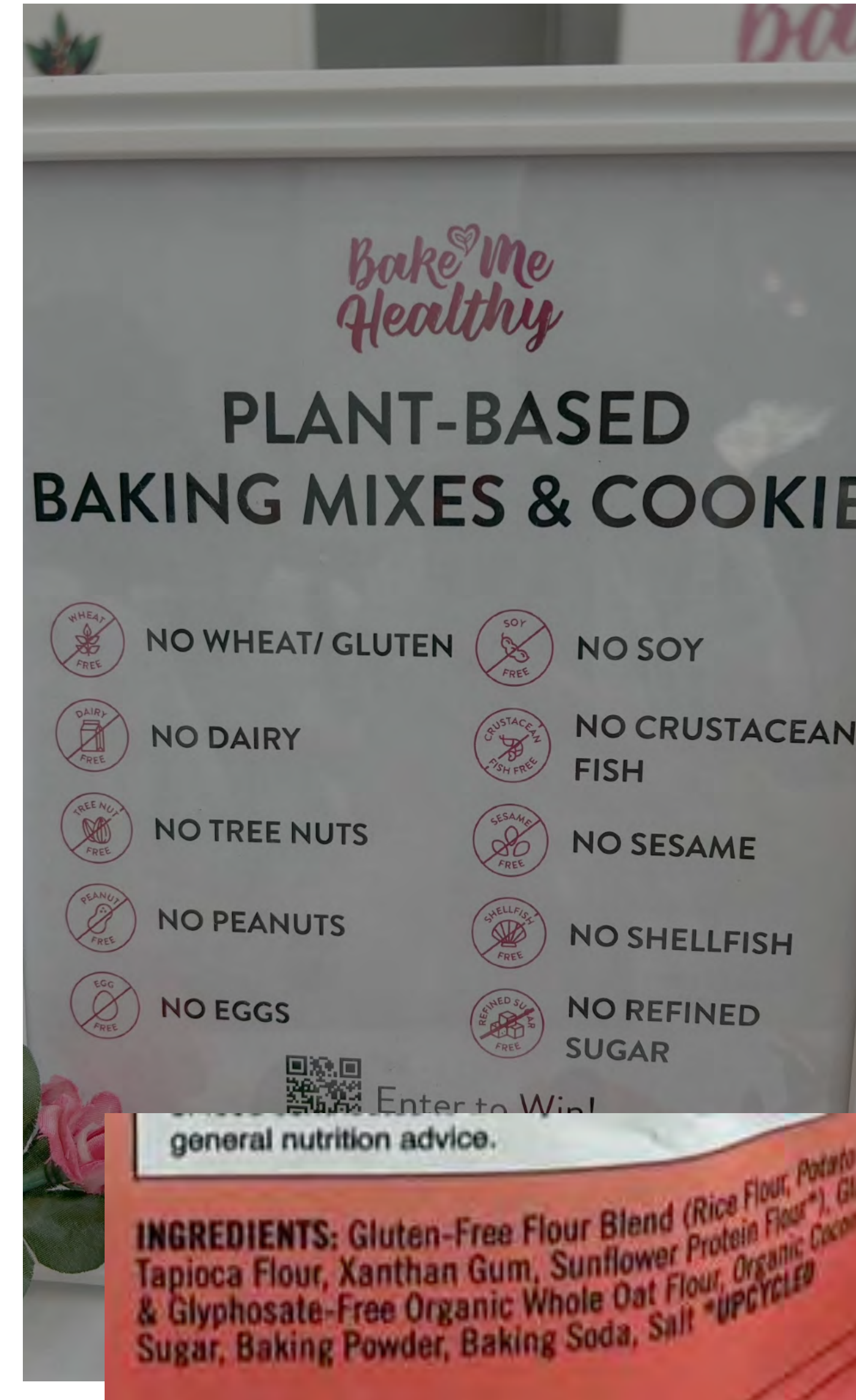


# #14

## Branding Healthier Indulgence

### Free From Strategy

- ◆ Oatmeal Pancake
- ◆ No wheat/ no Gluten
- ◆ No Dairy
- ◆ No Eggs
- ◆ No Refined Sugar
- ◆ No Allergens (tree nuts, peanuts, soy, sesame, ...)





02.  
**Top Trends**

# Childhood Pleasures



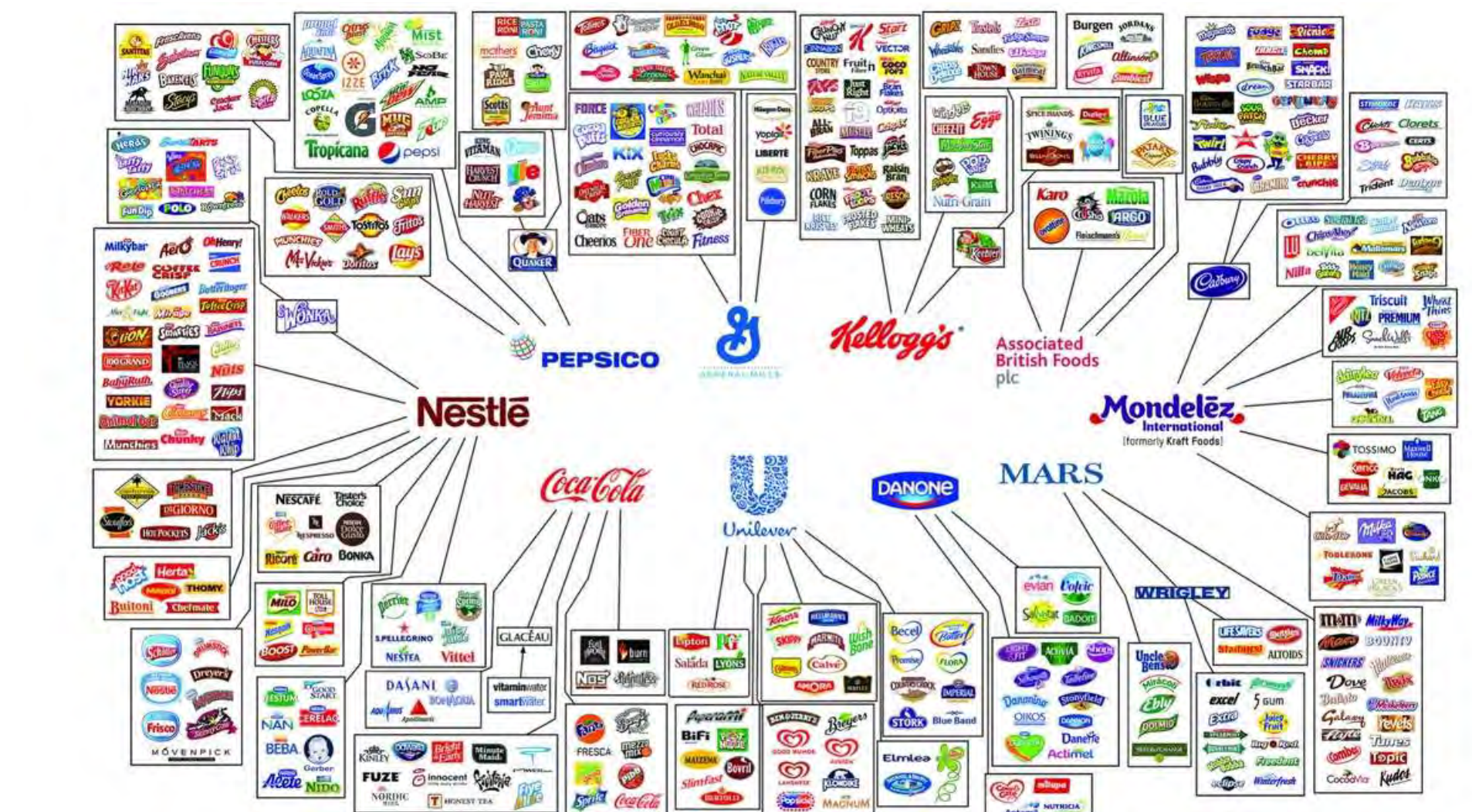
# #15

## Childhood pleasures

Brands are re-inventing F&B that are not up to current health standards.

Improved nutrition, no additive, clean label

- ◆ Candy
- ◆ Chocolates
- ◆ Sodas
- ◆ Cereals
- ◆ Pasta
- ◆ Etc.





02.  
**Top Trends**

# Chocolate with benefits



# #16

## Chocolate with benefits

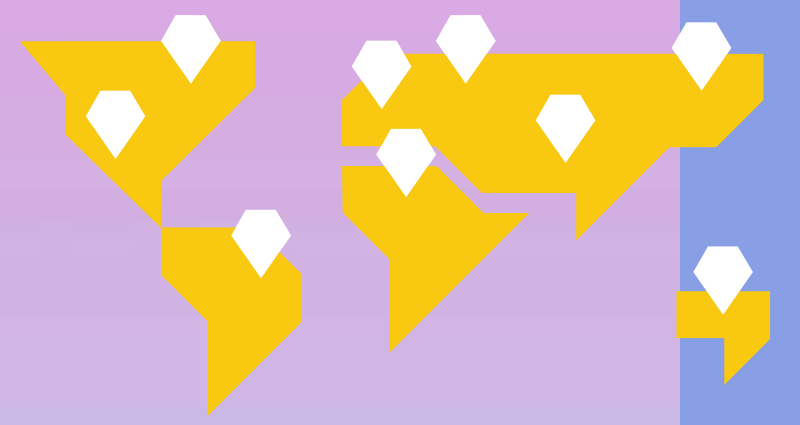
Chocolate as a carrier for other ingredients

Chocolate has some inherent undisputed mood and dark chocolate even health benefits thanks to its polyphenols.

Gums are one of the fastest growing supplement categories because some indulgence makes it so much easier to remember a health habit.

Chocolate is for many part of day or evening routine, so no wonder we start seeing chocolate with additional benefits and ingredients.





02.  
**Top Trends**

# Soda is back





#17

# Soda's back

The classic is coming back, better than ever

Beverage's favorite category is going through a healthy makeover.

Classic flavors are coming back with real fruit, less sugar, no artificial sweeteners and added benefits – from gut health to hydration – through pre, pro and postbiotics, promising the same taste and enjoyment as ever, but none of the bad stuff.

This year at Expo we witnessed an explosion of new brands, entering the category after Poppi's recent exit to PepsiCo for almost 2b USD.



03.  
**TRENDS**

# **Sober curious**





#18

# Sober Curious

Growing health and wellness consciousness, changing social patterns

Moderation is going mainstream as a behavior – before it was while being pregnant and driving, now it's throughout the year, to feel at one's best, being on top of the game, staying healthy are main motivators.

People recognize that there is time to moderate and the the sober curious movement among Gen-Z speaks about growing acceptance and less social pressure to drink.

Reports that **53.6% of Spanish** 18–30 year-olds reduced alcohol intake.

50% of UK Population is moderating alcohol consumption

La tendencia a reducir el consumo de alcohol se llama sober curious y está de moda

AMINIE FILIPPI  
30/05/2024 - 09:52

El movimiento *sober curious*, o *sobriedad curiosa*, abre la conversación acerca de cuánto **alcohol** bebemos (nosotras y nuestros hijos) y por qué nuestra salud y bienestar piden a gritos que reduzcamos su consumo. La idea es reflexionar y evaluar la **relación que tenemos con él**, descubrir **nuevas formas de diversión alcohol-free** y, de paso, explorar esta nueva forma de vivir. Te contamos cómo.

Gen Z drink **20% less** than millennials did at the end of their adolescence.

Según un estudio de Ipsos y la Universidad de Oxford, el **40% de los millennials** toma bebidas 0,0 cuando sale.



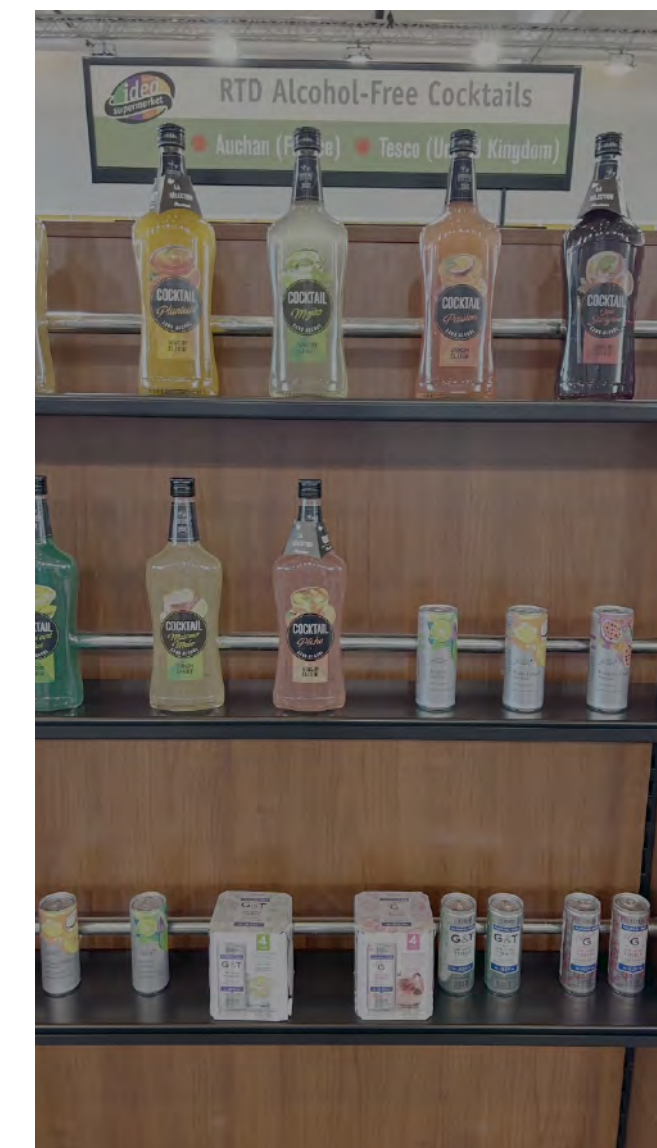
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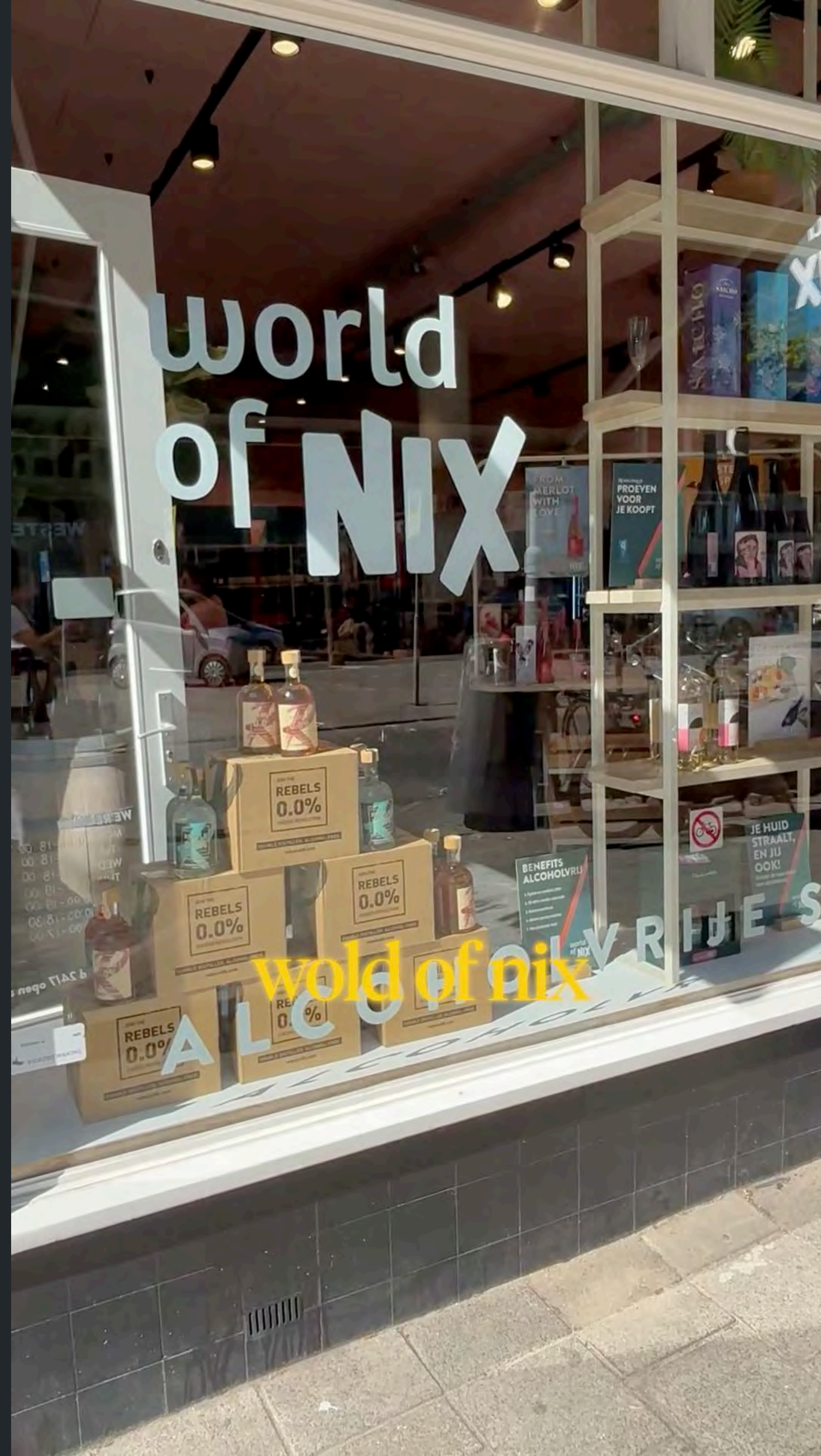
## Sober curious

UK retailers bet on RtD Cocktails and Mocktails

In the UK 50% claim to be drinking less and wanting to be drinking less.

Retailer bets are on Protein, Energy Drinks and low and no alcoholic cocktails – RtD either in individual cans or in “party bottles





# *World of Nix*

## Amsterdam





**EXPLORA.**  
**CONECTA.**  
**INNOVA.**