

# TASTE OF THE FUTURE

Webinar, 10:00-11:00 , 1<sup>st</sup> July Amsterdam

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# Agenda of today



**Setting the scene  
of society & role  
of health**



**Taste of the  
future**



**The role of  
brands**



# SETTING THE SCENE

# GLOBAL TRENDS

50.000

Citizens

50

Countries

5 m

Data points

One of the largest public opinion studies ever.



# Nine macro trends

**Globalisation  
Fractures**



**Splintered  
Societies**



**Climate  
Convergence**



**Technowonder**



**Conscientious  
Health**



**Retreat to Old  
Systems**



**Nouveau  
Nihilism**



**The Power of  
Trust**



**Escape to  
Individualism**



# F&B industry is not immune to these societal shifts



**Geopolitics** impacting local and global resources



**Health regulations** determining legality of weight drugs and food labelling



**Food choices** forming a declaration of values



**Inflation & uncertain economy** driving people to private label

Source: Ipsos Global What The Future Foods 2024

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# Health is a key driver of change in F&B industry

## Importance of Health



84% of consumers believe of all the things I can do to maintain good health, eating right is the most important

## GLP-1



More than half of all Americans (53%) are interested in taking a drug that would help reduce cravings to eat, resulting in weight loss.

## Limited alcohol consumption



Younger generations are more mindful about drinking alcohol than before (US: 46% GenZ vs 28% Baby Boomers worry about the impact of alcohol)

# Qualitative research in the Netherlands

## Our approach

Qualitative research to gain a deeper understanding of the Dutch consumer perspective

## Who we spoke

16 interviews with Dutch consumers from different generations

- Generation Z: 18-24
- Generation X: 50-60

With a spread in education level

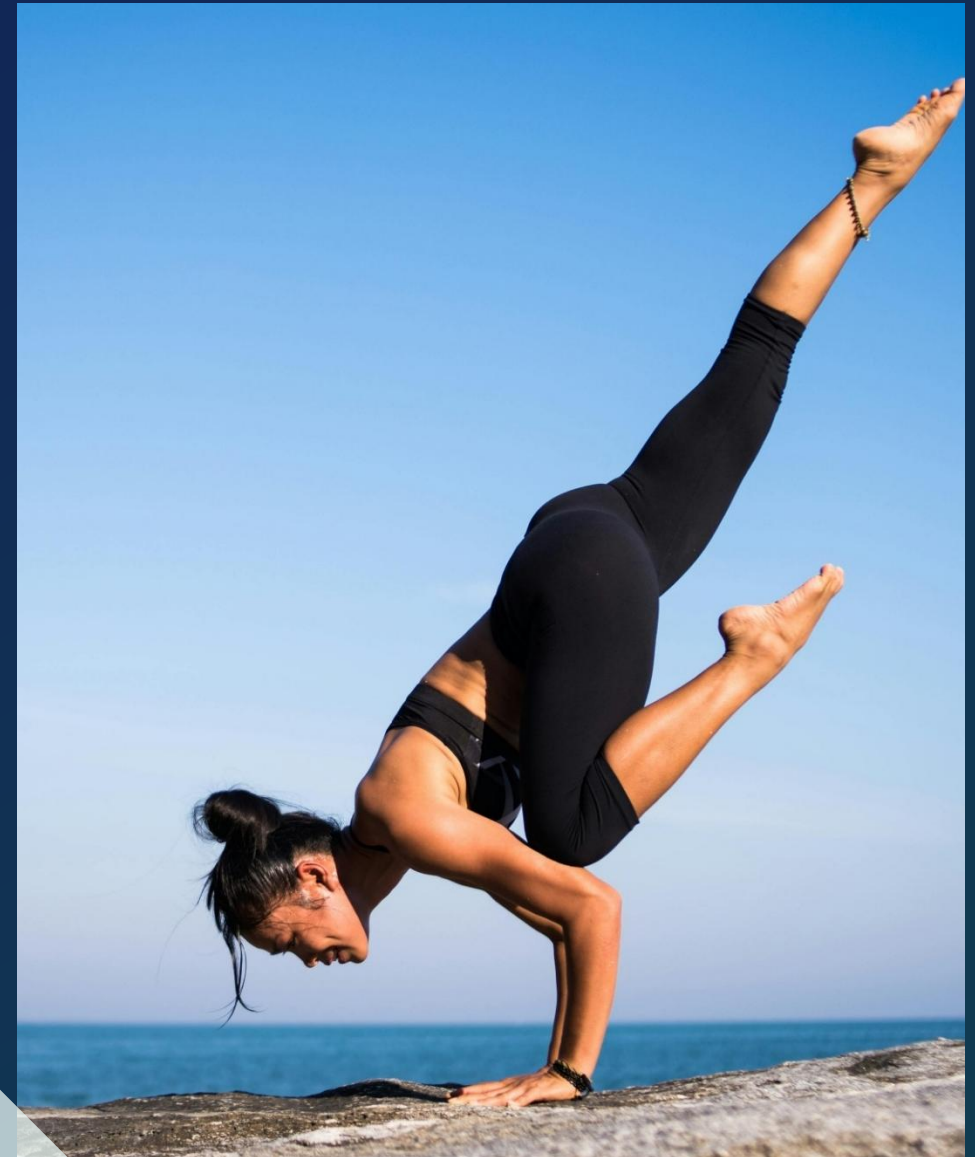


Being healthy is strongly linked to feeling good about yourself & in your skin, enhancing **happiness**.

It is an integration of different health dimensions in which **food plays an important role**.

“Food determines 70% of our health the rest is 30%”

## Defining health



# Indicators of healthy food



## Intrinsically



**Product as a whole**

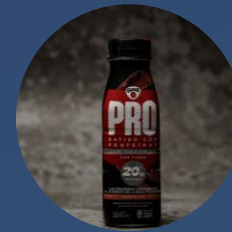


**Ingredients**



**Nutrients (micro & macros)**

## Extrinsically



**Claims**



**Labelling**



**Brands**



# Barriers when it comes to healthy food choices



**Price**

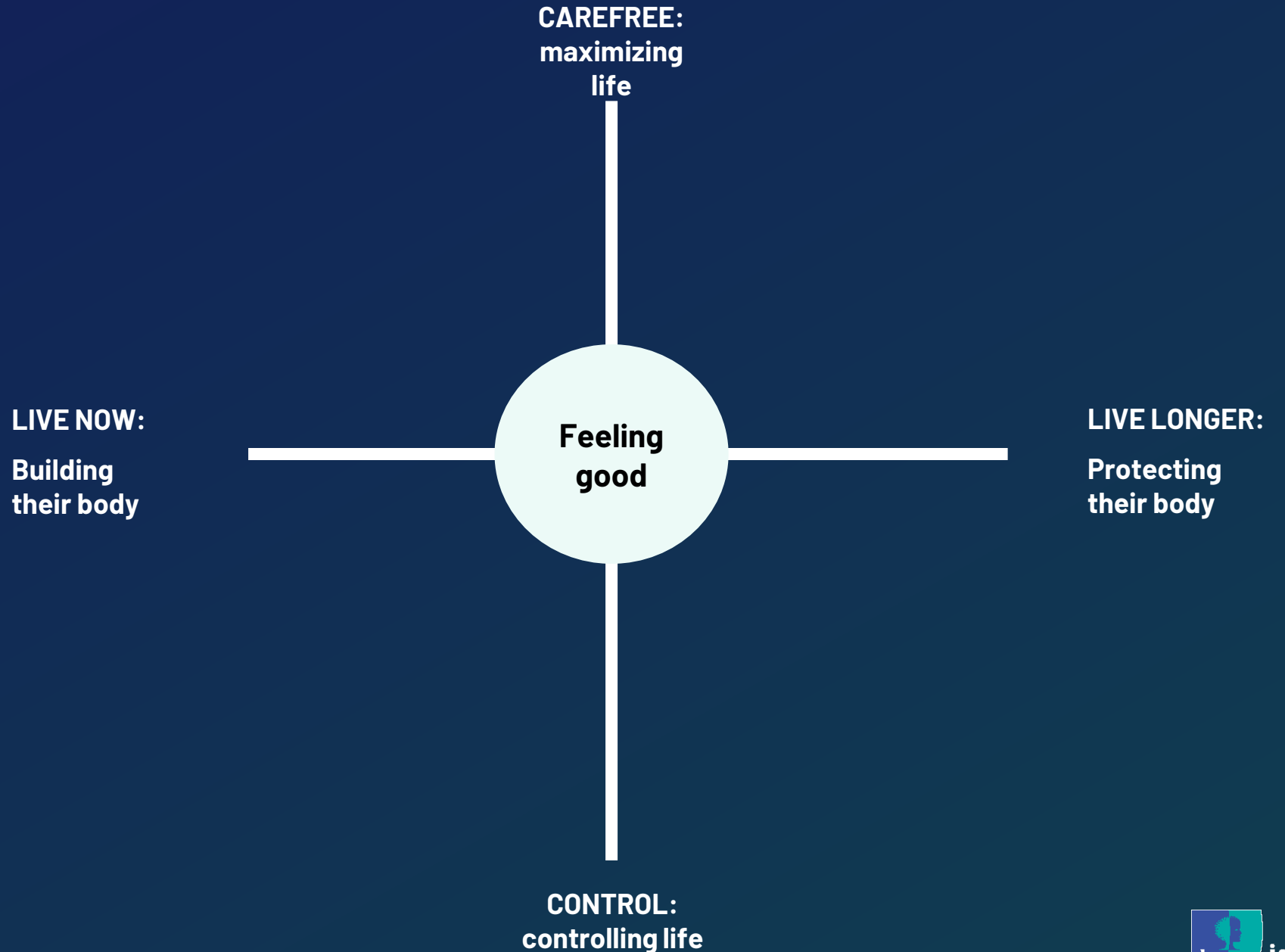


**(Perceived)  
Misleading information**



**Distrust**

# We found four different profiles when it comes to healthy eating





# We found four different profiles when it comes to healthy eating



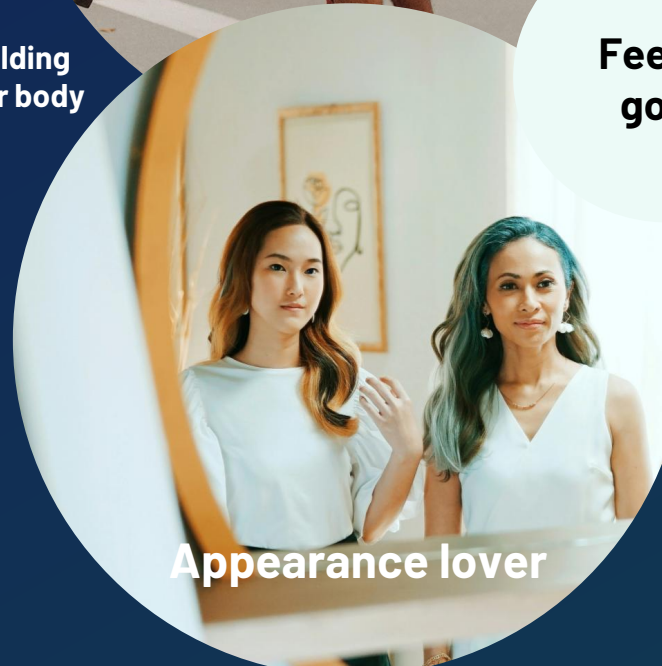
**Energy hunter**

**CAREFREE:**  
maximizing life



**Mindful hedonist**

**Building  
their body**



**Appearance lover**

**Feeling  
good**



**Safety seeker**

**Protecting  
their body**

**CONTROL:**  
controlling life



# ENERGY HUNTER

## treats food as a source of energy

- They have a **short-term goal** of looking for nutrition that meets the needs of their active lifestyle (e.g. muscle building).
- To do so, they balance healthy food that contributes to their energy needs and fun.
- They view food as more functional, therefore, they tend to go more for convenient and easy food products that help them reach this goal.



- Often, the younger consumers.
- Including factors as:
  - **Product as a whole:** the freshness is liked
  - **Ingredients**
  - **Macros of which protein is key**
  - **Claims**, for example, fibre-rich





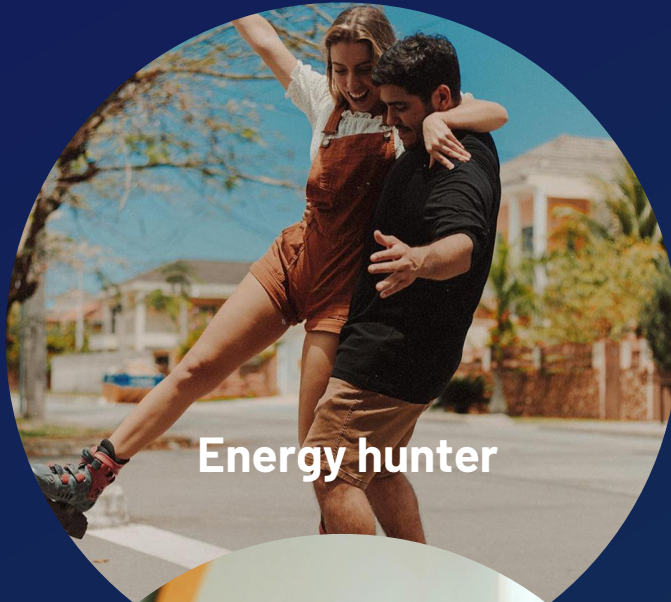
# APPEARANCE LOVER

## focusses on their visual looks

- **Short-term goal** of looking for nutrition that enhances their visual looks and strengthens their confidence.
- They are a bit stricter about their eating habits to accomplish their goal. Eating specific foods that help them with their looks or avoiding specific foods that can have a negative effect on their appearance.
- Influenced by social media, in which beauty ideals and comparisons are common.



- Often, the younger consumers.
- Including factors as:
  - **Product as a whole:** avoiding high kcal products
  - **Ingredients:** avoiding e.g. soy
  - **Macros such as carbs & fat**
  - **Micros such as omega**



**Energy hunter**

## RECAP ON THE YOUNG PROFILES

- Focused on immediate benefits (rarely look at the future) and are actively looking for them.
- Learn a lot from social media communication.
- Open to new products.
- Limited brand loyalty.



**Appearance lover**

Excesses!





# MINDFUL HEDONIST 'balances' health & taste

- A more **long-term** oriented goal of having a high quality of life by trying to find a balance between having fun and eating healthy.
- Less strict about their eating habits. They do not experience eating healthy as something 'fun'.
- Find that taste is often more important than health.
- Also, alcohol is common for this group.



- Often somewhat older consumers.
- Including factors as:
  - **Products as a whole:** the freshness of it.
  - **Macros, especially carbs & fat**
  - **Labelling** such as organic



# SAFETY KEEPER sticks to their well-known choices

- **A more long-term** oriented eater. As they try to avoid illnesses and prevent a disbalance in the different health dimensions.
- They want to avoid taking (unnecessary) risks with their food consumption. Therefore, they stick to routines they had with often more traditional dishes: e.g. potatoes, vegetables and meat.



- Often somewhat older consumers.
- Including factors as:
  - **Product as a whole:** e.g. freshness. Avoiding unnecessary risk, such as antibiotics in meat
  - **Labelling** helps them find safe products
  - **Brands**



## RECAP ON THE OLDER PROFILES

- Focusing on long-term benefits, considering what the future will hold for them.
- Lean on established knowledge sources.
- More brand loyal.
- Besides that, they focus more on labels such as organic.




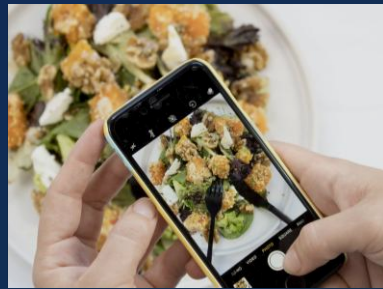






# TASTING THE FUTURE



# Ipsos Global food & beverage trends

AUTHENTICITY & LOCALIZATION	DIVERGING CONSUMPTION	CONSCIOUS HEALTH & DIETARY AWARENESS	DIGITAL INFLUENCE & CONVENIENCE	SUSTAINABILITY IMPERATIVE	TECHNOLOGICAL ADVANCEMENTS
Consumers are increasingly seeking out authentic food experiences	The food and retail industries are splitting between affordability and premium indulgence	Consumers are increasingly focusing on holistic health, emphasizing both physical and mental well-being	Digital platforms are shaping consumer preferences, increasing the need for convenience	Consumers want to make eco-friendly choices without sacrificing	AI, automation, and biotech are reshaping food and retail experiences
					
66%	35%→38%	9%→3%	\$2 trillion	+7.3%	\$230 billion
I am generally willing to spend extra for a product that is produced locally	Private label value share continues to rise	The narrowing gap between those who want to do more about their physical health and their mental well-being.	Estimated global revenue generated by social commerce expected to be surpassed by 2025.	Revenue CAGR for the eco-friendly packaging market over the next 10 years.	Size of the global online food delivery market by 2027.
Globalisation Fractures Retreat to Old Systems	Splintered Societies	Splintered Societies Conscientious Health Escape to Individualism	Technowonder Escape to Individualism	Climate Convergence Globalisation Fractures	Technowonder Escape to Individualism



# Authenticity & Localization

## AUTHENTICITY & LOCALIZATION



I am generally willing to spend extra for a product that is produced locally

<b>66%</b>	<b>63%</b>	<b>54%</b>
Global	EU	NL

## Local Products

Rising fuel costs and environmental concerns are increasing consumer interest in local, sustainable farm-to-table food.



Koopmans' Nedertarwe uses Dutch-grown wheat and HVO100-powered transport to offer a hyper-local, low-emission alternative to imported grains.

## Nostalgic Nibbles

Nostalgic food flavors, offering comfort and familiarity, are inspiring modern twists on childhood snacks and traditional dishes.



General Mills reintroduced 'Dunkaroos,' a popular 90s vanilla cookie snack, which is now mainly popular with millennials.

### Source:

Ipsos Global Trends 2024 | IGT 2024 Food Takeout | IGT 2024 F&B Takeout | Koopmans | FlavourSum





# Conscious Health & Dietary Awareness



## CONSCIOUS HEALTH & DIETARY AWARENESS



I will sacrifice convenience if it means getting healthier products



## Sober Shift

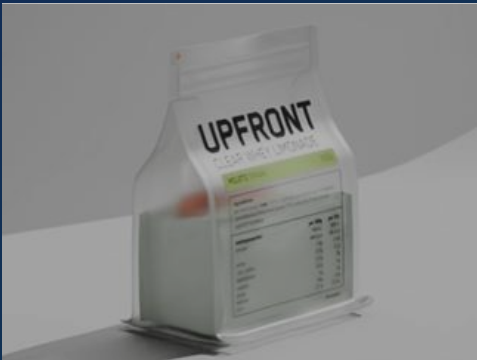
Younger generations are choosing non-alcoholic drinks for wellness, image, and mindful moderation.



De Soi (US) offers non-alcoholic aperitifs made with natural adaptogens, promising 'a buzz without the booze'.

## Mindful Eating

Portion-controlled snacks and meals are popular as brands promote moderation with nutrient-dense foods and educational marketing.



Upfront, a fast-growing Dutch e-commerce company, sells transparent sports nutrition and supplements, popular among Dutch students.

## Functional Ingredients

Healthier foods enriched with fiber, fermented protein, and superfoods are driving innovation, emphasizing neuro-nutrition, gut health, and immunity.



Better Nature (UK) harnesses natural fermentation to create tempeh-based foods, unlocking high-protein, gut-friendly benefits in the functional food space.

Source:  
Ipsos Global Trends 2024 | IGT 2024 Food Takeout | IGT 2024 F&B Takeout | Food Marble | Telegraph | Upfront | BetterNature

# Diverging Consumption



## DIVERGING CONSUMPTION



Inflation is one of the three most worrying topics in my country.

Region	Percentage
Global	33%
EU	32%
NL	23%

## Rise of Private label

Due to inflation and economic uncertainty, private label continues to rise and be popular, not only among those struggling to get by

Jumbo launches new food brand: 'Between A-brand and private label'

Food | 14 November, 2024



Recent example is Jumbo launching its own new brand – Jumbo's, which sits in between private label and A-brands offering high quality products for a moderate price.

## Smart budgeting

Economic pressures are pushing consumers toward budget options, driving brands to offer value products, meal kits, and alternative proteins.



"Fakeaway" meals; ready-to-heat versions of takeaway favorites—are gaining popularity among young consumers. A US-based company Savorly sells frozen appetizers combining elevated gourmet flavors with convenience and affordability.

## Luxury Indulgence

Even in uncertainty, affluent consumers seek premium, limited-edition goods, prompting brands to lean on exclusivity to justify prices.



Sous – an online luxury meal delivery service offering meals by chefs from well-known restaurants like Ron Gastrobar or De Liberije to be delivered at home.

### Source:

Ipsos Global Trends 2024 | IGT 2024 Food Takeout | IGT 2024 F&B Takeout | Global Advisor April 2025 | Unilever | Hospitality Insights



# THE ROLE OF BRANDS





# Power of Trust

What does the Nutriscore tell me?



Do influencers tell GenZ the truth?



What is healthy for me?



Do I trust these labels?  
Is it better for the world?



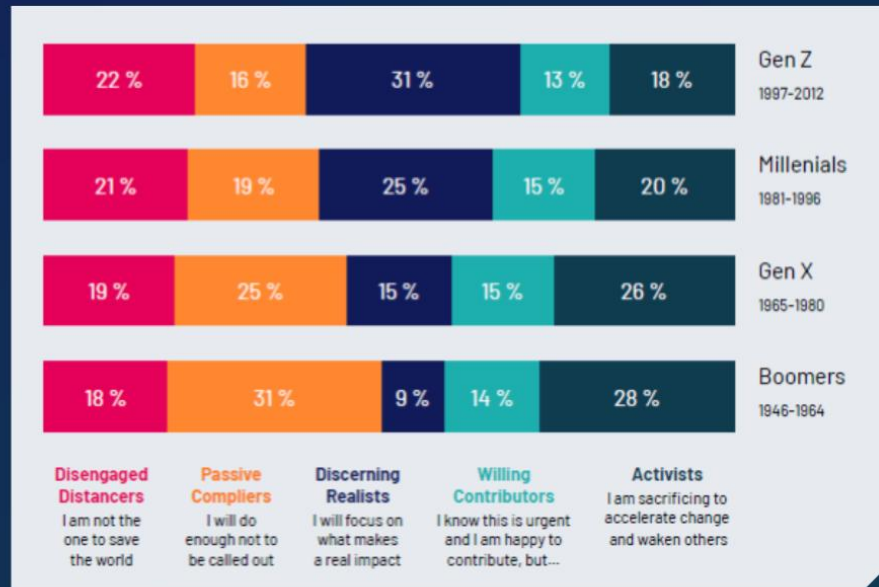
**Trust in brands  
is reduced**

**Level of loyalty  
is limited,  
especially  
among younger  
consumers**

# Contributing to society still matters

## Especially among Gen Z who look for tangible solutions

**Activists** are more likely to be **Boomers & Gen X**.  
On the other hand, **Disengaged Distancers** (those feeling like they are not the ones to save the world) and **Discerning Realists** (those concentrating on impactful ways to address ESG challenges) are **more likely** to be **Gen Z and Millennials**.



Source:  
Ipsos Eco-Perceptions – How different Generations Navigate Risk 2025

© 2025



**81%**  
*believe  
companies have  
a duty to make a  
societal  
contribution*

# Navigating uncertain societies

**Food & Beverage brands need to find ways to...**

**Justify a higher price**

**Build trust through  
equal values**

**Contribution to society  
should be a co-benefit**

**GenZ is more critical**



# What can you do based on the trends

## AUTHENTICITY & LOCALIZATION



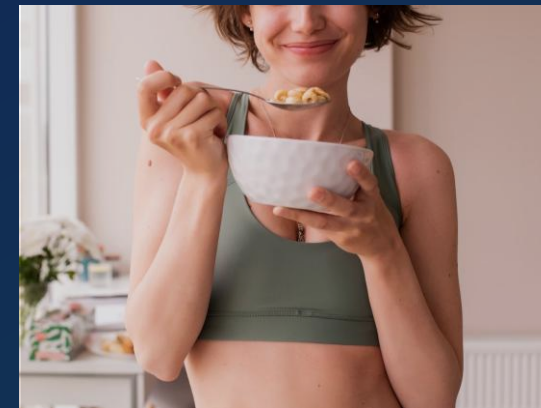
- Purity
- Simplicity
- Clean labeling

## DIVERGING CONSUMPTION



- True Luxury
- Tiny Luxury
- Added Value
- Truly Cheap

## CONSCIOUS HEALTH & DIETARY AWARENESS



- Personalized nutrition
- Mental benefits
- Social benefits
- Connect with HCP's

# How we can support you to activate trends & foresights for your brand

## Localize & Customize



Identify local and category specific implications of the trends

## Category vision



Develop a future category/brand vision for the client

## Future projections



Define scenario's based on key drivers of change & project segment growth

## Innovation



Fill your innovation pipeline by understanding micro and macro contexts





# **DOES IT TASTE LIKE MORE?**

## **PLEASE CONTACT US**

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