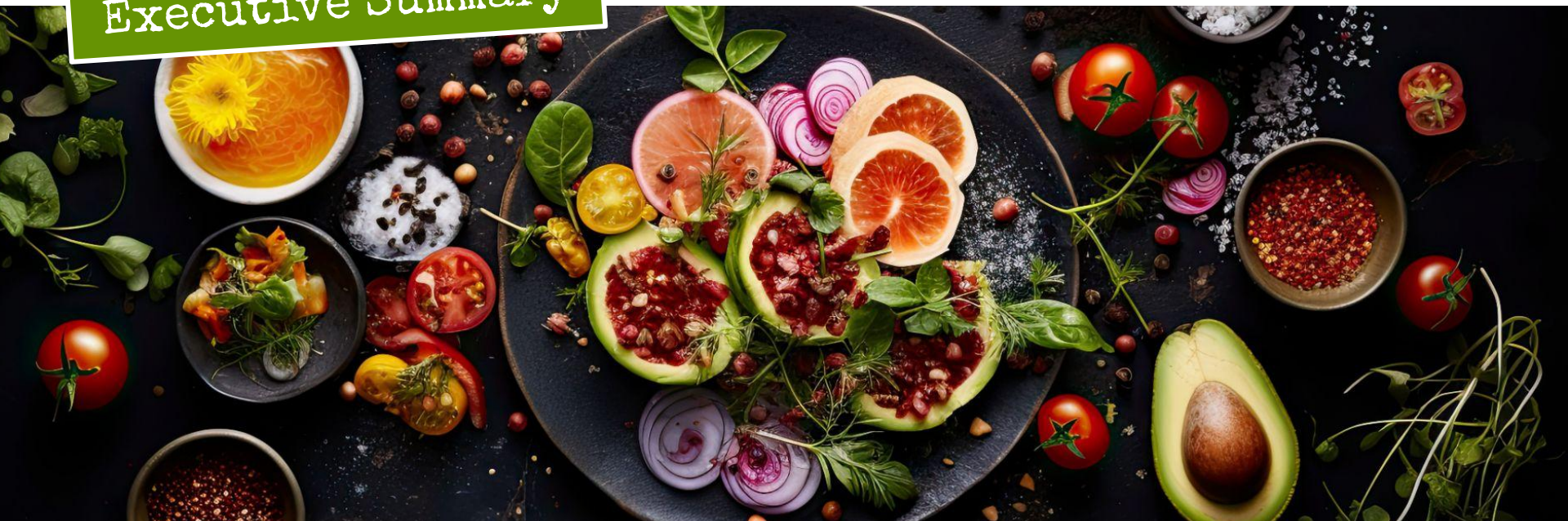
MATTSON

5 MACRO MOVEMENTS, INSIGHTS & INSPIRATION THAT WILL INFLUENCE 2024 PRODUCT INNOVATION

Executive Summary



OVERVIEW: 2024 MATTSON MACRO MOVEMENTS, INSIGHTS & INSPIRATIONS

If we could sum up trends in 2024 in general, they'd start with AI, since it's impact will be felt on everything, everywhere. In fact, we were busy throughout 2023 enhancing our signature creative and insights services with AI. If you'd like to learn more about how we're using the tech, watch Chief Creative Officer Steve Gundrum here on "Thinking Bigger & Faster with AI."

We've also added a section for how AI could play a role in each of our 5 Macro Movements. The possibilities are not just endless, but not even imaginable. Yet.

OVERVIEW: 2024 MATTSON MACRO MOVEMENTS, INSIGHTS & INSPIRATIONS

01.
FOOD IS HEALTH

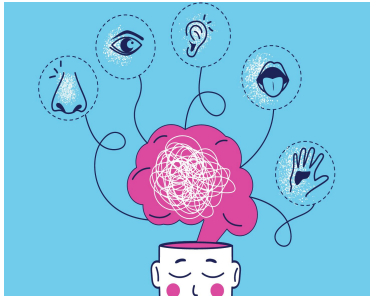
1. Healthspan Hopefuls Hack Health
2. Will AOMs Change The (semaglu)Tide?
3. At-Home-Enabled Personalization
4. Diets Culture Goes Global

02.
TECH FOR THE KITCHEN TABLE

5. The Search For The Next Air Fryer
6. From TikTok to Target to Table
7. Connected Cooking

03.
CARBON FOODPRINT

8. Food Waste Focus On Ingredients
9. Food Waste Focus On Tech
10. Political Polarization Hits The Plate
11. Regenerative Ag Interest, Investment



04.
SENSORY EVOLUTION

12. Sweet
13. Sour
14. Salty/Umami
15. Texture
16. Multi-Sensory Experiences

05.
NUTRITION IN THE SPOTLIGHT

17. Fiber: The Forgotten Nutrient
18. Ultra Processed Food: Should We Be Worried?
19. Mass Market Nutrition & Nutrition Science (Propaganda)?

01. FOOD IS HEALTH

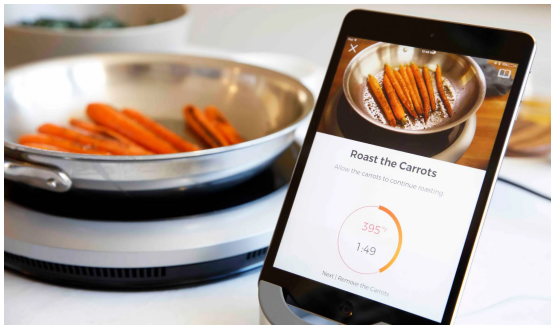
Next on our list is the adage "food is medicine" reimagined as "food is health," through the lens of wellness, not sickness. And this goes for longevity as well, where lifespan is merely a number; but we speak in terms of healthspan: the aspirational, enjoyable years we will live in a healthy, strong, and mobile state.

One of these trends aligns with our in-field study on AOMs, the anti-obesity medications that just might extend diabetics' healthspan. And, possibly change the fundamentals of some large categories such as snacks, beverages, and QSR.

At-home enabled personalization was buoyed by COVID-19 swabbing, but shows future potential for enabling personalized food and nutrition from now until you're eating a diet that's yours and only yours. This comes after centuries of everyone being told to eat the same diet.

Last in our Macro Movement FOOD IS HEALTH is the normalizing of global flavor, especially within a generation you wouldn't expect to be worrying about their weight or appearance: the youthful Gen Zs, who are at an age where they can barely even envision their own healthspan!

02. TECH FOR THE KITCHEN TABLE



Did you know that air frying has been used by both foodservice operators and manufacturers for decades? When, then, did the proliferation of this technology make it to almost half of all Americans' homes? The 2020s will be remembered as the decade of air fryers, the darling of the kitchen countertop. What will displace it? Don't bet against an appliance that'll be AI-enabled and web-connected. The tech is already available in some late models.

Connection is what our next trend is about. We anticipate that all makers of kitchen tech, tools, and touchscreens will be searching, desperately for that next It. In the meantime, we've built a playbook on our vision of ways to win.

TikTok needs no introduction as a food force to be reckoned with, but perhaps what does need an intro are the consumer products that have been spawned from TikTok content, tapped into by forward-thinking, culinary-focused brands. Cloud bread. Pink sauce. Sheet pan meals. Feta everywhere! What's next? That's what we're tracking.

Connected cooking used to mean finding a recipe online, printing it off, and going to the store to pick up items from your list. It's quickly evolving into a multi-modal endeavor with online or AI audio, video to get those veg cuts right, and a connected, monitored device that, like air frying, results in restaurant-quality food with far fewer calories. We can only wish.

03. CARBON FOODPRINT

We started using the term Carbon *Food*print a few years ago, when it became all too clear that a large percentage of greenhouse gas emissions come from our food system. It's a way for us to take responsibility for our industry's role in climate change. We get excited about being able to help our clients create more sustainable versions of what's out there in the market.

Food waste has become so important to reversing climate change that the FDA, USDA, and EPA have made upcycling a primary solution, second only to not creating waste in the first place.

Our December, 2023 webinar, Upcycling Has Evolved. Has Your Understanding of It? focuses on the fact that you don't need to upcycle waste to create upcycled products. There are dozens of available ingredients that meet the certification. We've been working with some of them to envision, validate, and confirm their ingredients' unique opportunity in the marketplace.

Political polarization on the plate is another thing we're watching. Yes, we're the land of the free, but we're not free of dissent. Even when it comes to our food choices.

UPCYCLED CERTIFIED™

Lastly, we're watching the incredible commitment to regenerative agriculture, by big players like Danone and General Mills, as well as environmental stalwarts like Patagonia Provisions and Nature's Path. Right now it's small but growing. What does the future hold? Will regenerative agriculture be one of the solutions to carbon capture?

04. SENSORY EVOLUTION

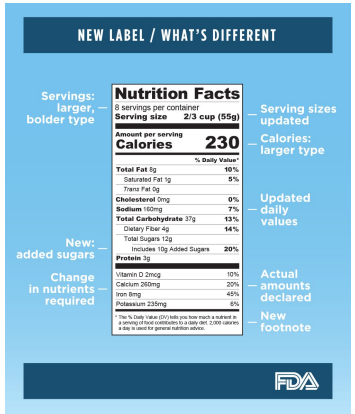
The average American child consumes a bathtub full of sugar per year. A bathtub!

This quantity doesn't surprise us, as we've been developing products for American palates for 47 years. And while we draft a lot of product design briefs with goals of zero grams of sugar, this goal is often abandoned when clients taste the product. Everyone knows that taste reigns supreme, and a few grams of sugar can easily sway a consumer.

It does look like 2024 is the year that real effort will be made to remove excess sugar from our food products. The question is how to do it: use another natural sweetener, use a non-nutritive sweetener, or go unsweetened?

We're watching categories where sweetness expectations are changing, which requires a re-training of the palate and a reformulation of many products. Driven by FDA's added sugar labeling and new healthy definition changes, we also anticipate that the 2025 Dietary Guidelines for Americans will sour on sugar, along with many local taxes still to be levied.

To keep things delicious and compelling, that means food companies need an understanding of the rest of the sensory spectrum, all of which is constantly evolving. That's what we're tracking. From sweet to sour to savory/umami and more.



05. NUTRITION IN THE SPOTLIGHT

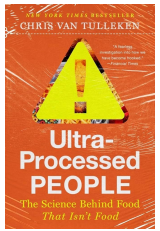
Imagine settling down on a cushy couch with your loved ones to watch something on a streaming service. How about a documentary? Well, let's see. There's **You Are What You Eat**: a twin study to evaluate the effect of different diets on health. Another documentary, **The Blue Zones**, is about communities that generate more centenarians than others, through food and more. And **Game Changers** aims to prove that plant-based diets can enhance sports performance. And of course, there's **Somebody Feed Phil**, **Chef's Table**, **The Taco Chronicles**, and more for the food and drink lover.

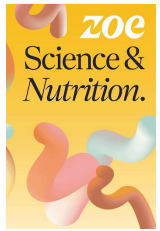
And if you're into podcasts, there's even more fodder for upping your health game through nutrition: the **Huberman Lab**, the **Zoe Podcast**, **Science Versus**, and **The Drive** podcast from NY Times best-selling author, Peter Attia, MD.

When and why did nutrition become mass market entertainment? And is it really entertainment? Or propaganda? That might depend on your diet. Or your politics (see movement #3).

Beyond the overwhelming choice in dietary distractions there are other phenomena around us making some companies and categories nervous, the most potent one the NOVA system that classifies food as Ultra Processed. Or not. There's a book, too.

We're watching, listening, and reading what the future might hold, as regulations on sugar, processing, what Americans should eat, and when, how, and where companies can market their food if it doesn't measure up. We're already feeling the early effects, with clients trying to get ahead of these regs through reformulation and/or new product lines that meet them.





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This summary is just a taste of what we're thinking about, watching unfold, and developing insights, strategies, and products around.

If you believe your R&D, Innovation, Insights, or Executive team would benefit from the full presentation, please reach out to us at **contact@mattsonco.com**.

There are a few ways to engage, most free:

1. Schedule a customized online presentation of Insights & Inspirations
2. Schedule a customized in-person presentation of Insights & Inspirations at the Mattson Innovation Center
3. Schedule a customized multi-sensory Insights & Inspirations Lunch at the Mattson Innovation Center