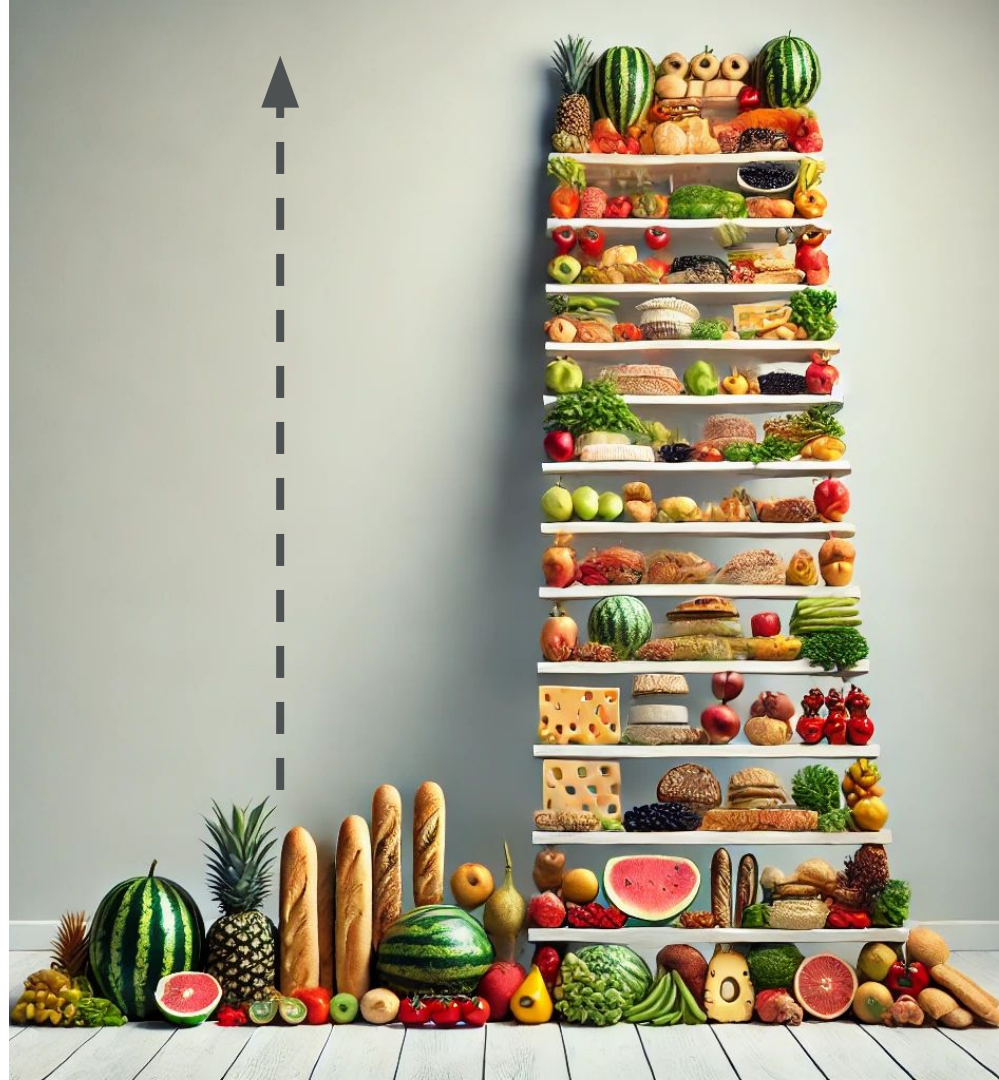


▲ MATTSON

# 2025 MACRO MOVEMENTS & TIPPING TRENDS THAT LADDER UP TO YOUR BUSINESS

[mattsonco.com](http://mattsonco.com)



# 2025 MACRO MOVEMENTS & TIPPING TRENDS



**Barb Stuckey**  
*Chief New Product  
Strategy Officer*



**Emily Auerbach**  
*Innovation Manager*



**Erin McGlothlin**  
*Innovation Manager*

A photograph of a pharmacy interior, viewed through a glass-walled laboratory area. Two pharmacists in white lab coats are working at a counter. The scene is overlaid with a green tint. The text "WHO WE ARE" is centered in white, bold, sans-serif font.

# WHO WE ARE

# MULTI-DISCIPLINED, EXPERIENCED PROFESSIONALS...



65+

employee-owners

**Strategists,  
Scientists,  
Chefs,  
& Scale-up  
Specialists**

Driven by a  
**passion  
for food**

Focused on  
**Making a Difference**  
in the **world**  
and our **community**

## WE OPERATE FROM KEY HUBS OF FOOD INNOVATION

### CALIFORNIA WINE COUNTRY

ASPIRATION FOOD  
AND BEVERAGE

### SAN FRANCISCO

VIBRANT CULINARY SCENE

### SOUTH SAN FRANCISCO

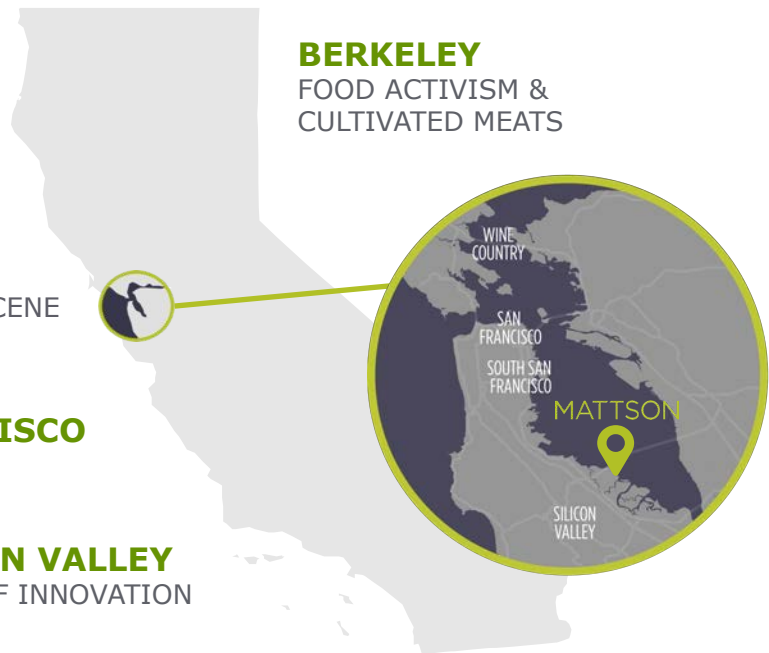
BIOTECH

### SILICON VALLEY

SPIRIT OF INNOVATION

### BERKELEY

FOOD ACTIVISM &  
CULTIVATED MEATS



### CHICAGO

CPG FOOD HUB  
DEEP FOOD CULTURE  
US CULINARY CROSSROADS  
JAMES BEARD AWARDS  
HOME TO IFT



WE MAKE FOOD HAPPEN

WHAT WE DO



Our **value** to clients is in helping  
**identify the insights and strategies**  
**that inform big, viable ideas,**  
then execute against them with  
**product design, development, and scale up**  
with speed and excellence  
that results in **craveable products.**

# WE DEVELOP AWARD-WINNING PRODUCTS





# OUR WORK: 100% SHARE OF STOMACH

## BIG COMPANIES AND START-UPS...



## ... FRESH, CHILLED, FROZEN, AMBIENT



## ... CPG, FOODSERVICE, INGREDIENT



## ... BREAKFAST, LUNCH, DINNER, SNACK, OR ENHANCER



## ... FOOD AND DRINK



## ... FUN AND FUNCTIONAL



# OUR SECRET SAUCE: COMBINING AI WITH OUR RI



## AI FOR INSIGHTS

Allows us to build initial consumer or customer insights and hypotheses.

## AI FOR IDEATION

ProtoThink™ AI and Food Studio AI ideations enable use to explore more ideas and amplify creativity.

## AI OPTIMIZATION

Optimize concepts and products before consumer testing.

## FORMULATION AI

Accelerates the pace of product development from procurement to PD to commercialization.

*Used internally at Mattson.*

AND ALSO NEW IN 2025



MATTSON

**NOW OFFERING  
INNOVATION  
IN PET FOOD.**



# WE TAKE CLIENTS FROM WHERE THEY ARE... **TO LAUNCH**



# MATTSON FOODSERVICE: END-TO-END INNOVATION SERVICES



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5. Portion shrinkage
6. Snackification powers WFH
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## 2025 MACRO MOVEMENT #1

# DAYTIME & DAYPART DISRUPTION

The COVID-19 Pandemic created a new normal for lunch, thanks to the advent of WFH. Yup, working from home has wreaked havoc on restaurant lunches.

With people able to live a more flexible life, given work-from-home trends, they're seeking flexibility in what they eat, when.

Weekday restaurant lunches used to be a critically profitable daypart for QSR and other food-away-from-home operators, including non-commercial caterers.

It's now a fraction of what it used to be. And the biggest growth is in new occasions that have sprouted up at both ends of the day to replace the old-school 3-meals-a-day of breakfast, lunch, and dinner.

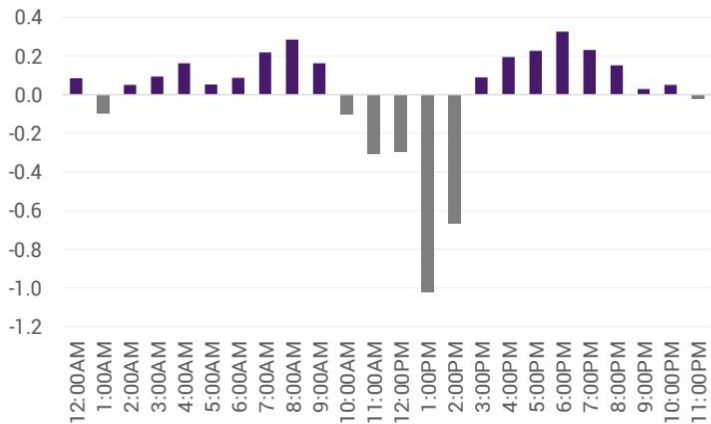


# TIPPING TREND: LUNCH TRAFFIC LOSSES

## Foodservice traffic time of day trends

Operators need to find ways to attract consumers during the middle of the day in order to reverse trends

Total Day Traffic Share Pt. Chg. vs. 2019

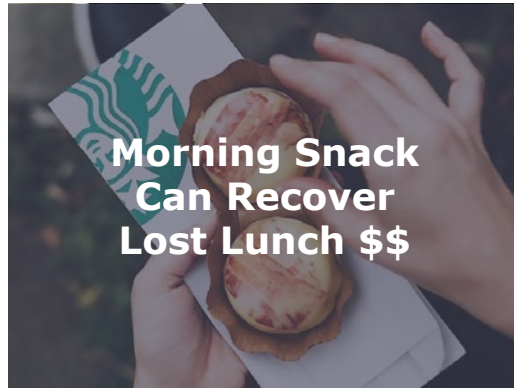
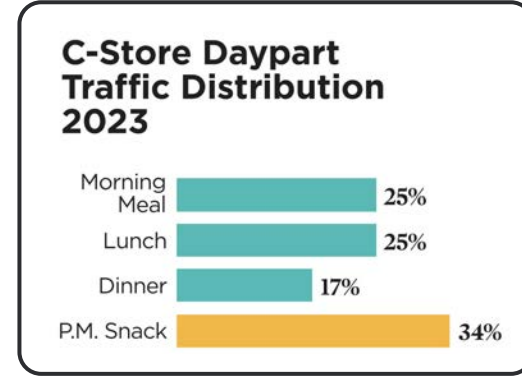
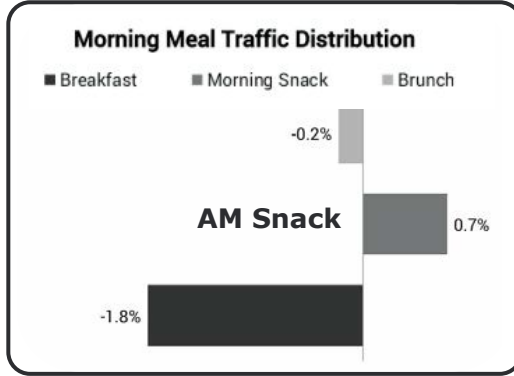


**If the middle of the day is soft, operators must focus on something else...**

Source: Circana, CREST® commercial foodservice, 12ME Dec.

# TIPPING TREND: MORNING SNACK & PM TREAT OCCASIONS RISE

## NEW, GROWING DAYPARTS



Sources: Circana, CREST® 12ME March 2024, Morning meal = breakfast/a.m. snack/brunch; Circana ReCount Fall 2023c

# TIPPING TREND: MORNING SNACK & PM TREAT OCCASIONS RISE

## NEW, GROWING DAYPARTS

Snack innovation among traditional QSR as well as new snack and treat-focused concepts



Sources: Circana, CREST® 12ME March 2024, Morning meal = breakfast/a.m. snack/brunch; Circana ReCount Fall 2023

# TIPPING TREND: MORNING SNACK & EVENING TREAT OCCASIONS RISE

## NEW SNACK OCCASIONS SPROUT ACROSS THE CLOCK.



Consumers are gravitating toward cheaper dayparts:

They are shifting toward the morning meal and P.M. snack because these dayparts have an **average check \$3-5 lower than lunch or dinner.**

## DUNKIN' SNACKS & WRAPS



WAKE-UP WRAP®



HASH BROWNS



SNACKIN' BACON



STUFFED BAGEL MINIS

Source: Circana, June 2024

## NEW CHAINS FOCUS ON PM (usually sweet!) SNACKS



101 new stores in '24



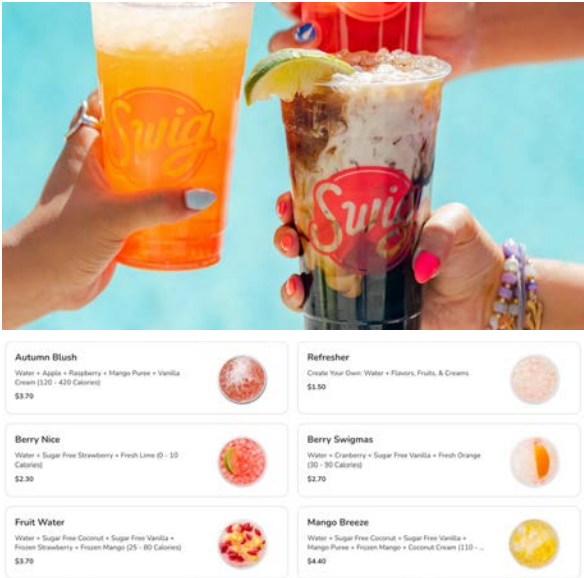
Braved NYC in '24









55 new stores in '24

# TIPPING TREND: MORNING SNACK & PM TREAT OCCASIONS RISE

## NEW CHAINS FOCUS ON PM PICK-ME-UP SNACKS IN DRINK FORM



<b>Autumn Blush</b> Water + Apple + Raspberry + Mango Puree + Vanilla Cream (120 - 410 Calories) \$3.70		<b>Refresher</b> Create Your Own: Water + Flavors, Fruits, & Creams \$1.50	
<b>Berry Nice</b> Water + Sugar Free Strawberry + Fresh Lime (0 - 10 Calories) \$2.30		<b>Berry Swigmas</b> Water + Cranberry + Sugar Free Vanilla + Fresh Orange (30 - 90 Calories) \$2.70	
<b>Fruit Water</b> Water + Sugar Free Coconut + Sugar Free Vanilla + Frozen Strawberry + Frozen Mango (25 - 80 Calories) \$3.70		<b>Mango Breeze</b> Water + Sugar Free Coconut + Sugar Free Vanilla + Mango Puree + Frozen Mango + Coconut Cream (110 - ...) \$4.40	

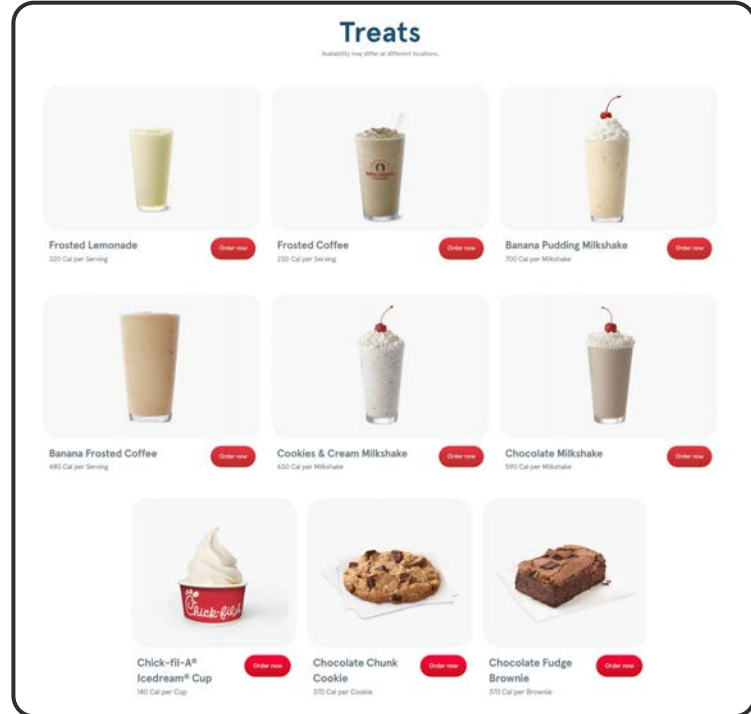
80 stores Selling  
"Dirty" Soda



Nestlé's CoffeeMate Takes  
Beverage Treat to CPG

# TIPPING TREND: MORNING SNACK & EVENING TREAT OCCASIONS RISE

## MANY CHAINS FOCUS ON SNACKS IN BREAKFAST & DRINK FORM



# TIPPING TREND: 24-HOUR A DAY SNACKIFICATION

## SNACKIFICATION OF MAIN MEALS

### WHY?

Making a snack into a meal or augmenting a meal with a snack, isn't new. Chips and a sandwich are a lunchbox staple. Now consumers do more of this throughout the day.

### WHY?

- They're looking for ways to cut more time from meal prep
- They're looking to save money at each meal
- Snacks provide more functionality than before



### HOW MUCH?

From March 2024, **37%** of main meals contained a snack item vs. **29%** in 2010.

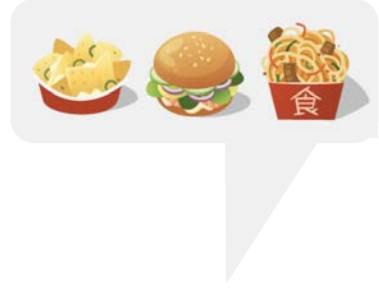
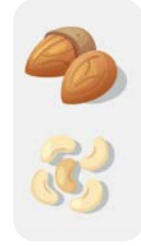
### WHO?

- Nearly **all generations** consume more snacks at **breakfast** than they did in the past.
- At **lunch**, consuming snacks instead of a real lunch has grown for 10+ years

**YOUNGER GENS BUT ALSO MORE GENERATIONS ARE SNACKING MORE AND EATING FEWER LARGE MEALS.**



# TIPPING TREND: NEW FLUIDITY IN EATING AT HOME WHILE WFH



5AM

6AM

7AM

8AM

9AM

10AM

11AM

12PM

1PM

2PM

3PM

4PM

5PM

6PM

**Q:**

What else is enabling people to walk away from burger, pasta, chicken, and taco MEALS etc. in the middle of the day?

**Uber  
Eats**

*A Friday  
Lunch  
Splurge*

**Uber  
Eats**

*A busy any  
day dinner*

# TIPPING TREND: SNACKIFICATION POWERS WFH ACROSS THE CLOCK



**A:**  
**PROTEIN**  
for 5+ years the food industry has been creating protein-driven products



# TIPPING TREND: SNACKIFICATION

**+ SNACKIFICATION  
ENABLED BY PROTEIN**



**PROTEIN COFFEE**



**+ FUNCTIONAL SNACK  
ACROSS THE DAY**



**+ PROTEIN POWERS WFH**



## 2025 MACRO MOVEMENT #3

# THE ECONOMICS OF EATING

After nearly 5 years of inflationary pressure, food prices are starting to stabilize.

**But Americans are still feeling the financial pinch.**

In the face of higher prices, consumers have changed their behavior. They're trading down on branded items, changing where they shop, and cutting out some categories altogether.

When consumers start feeling more wiggle room, will they snap back into old habits? Or will some of those newly discovered tips, tricks, and tradeoffs stick around?

# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING



## FOOD AND BEVERAGE PRICES ARE UP. WAY UP.

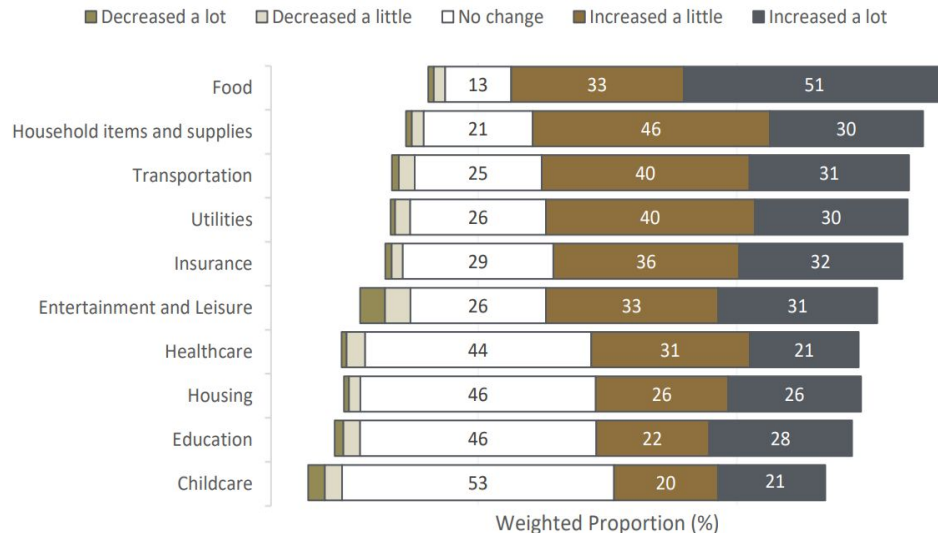
From 2019-2023, food and beverage prices rose by **25%.**

*That's 5 points more than the Consumer Price Index (CPI) as a whole, and even outpaced rising housing costs.*

Sources: USDA Economic Research Service (ERS); Purdue University Consumer Food Insights, May 2024

## CONSUMERS ARE KEENLY AWARE OF THIS JUMP.

Q: How have prices for the following expenses changed in the past 12 months for you and your household?



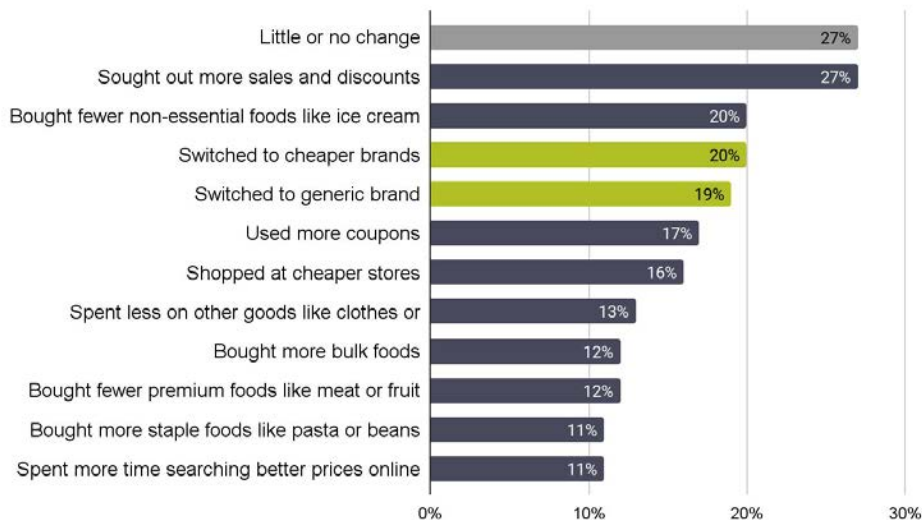
# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

## TIPPING TREND: EXPLORING BRAND OPTIONS

WITH RISING PRICES, CONSUMERS STARTED EXPERIMENTING WITH **NEW, LESS PREMIUM BRANDS** - OR WITH **NO BRANDS AT ALL**.

### CHANGES TO GROCERY SHOPPING IN RESPONSE TO FOOD PRICE INFLATION

*% of respondents (could select up to 3)*



Sources: Purdue University Consumer Food Insights, May 2024; IFIC Food and Health Survey, 2024



# 49%

of all consumers who noticed an increase in the cost of food and beverages have **swapped to new brands or products that are less expensive.**

# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

## TIPPING TREND: EXPLORING BRAND OPTIONS

**SOME OF THE FASTEST GROWING FOOD AND BEVERAGE BRANDS LEAD WITH AFFORDABILITY.**



**One of the least expensive RTD alcohol products in the US**

**These trades also may have changed private label perceptions.**

*% that agree with the following statements about private label food:*



**58%**

***I am buying more private-label products now than I did last year***

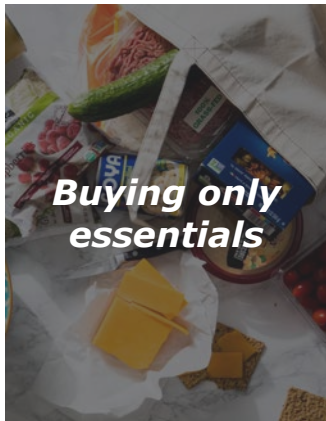
**80%**

***The quality is just as good or better than name brand***

Sources: Retail Brew, 2023; Ipsos Survey, Aug 2024

WHEN CONSUMERS AREN'T TRADING DOWN ON BRANDS, THEY'RE **TRIMMING THE FAT** IN THEIR SHOPPING CARTS.

About 1 in 4 Americans are...



## DIFFERENT GENERATIONS

are stretching their food dollars in different ways.



### Gen X + Boomers

*More likely to seek out sales and discounts*

### Gen Z + Millennials

*More likely to buy bulk foods or staples like pasta or beans*





# TIPPING TREND: TRIMMING THE FAT

MANY OF TIKTOK'S BIGGEST 2024 FOOD TRENDS BUILT ON **LOW-COST INGREDIENTS AND PANTRY STAPLES**



DENSE BEAN SALAD



COTTAGE CHEESE



CARROT SALAD

**CUTTING DOWN ON NON-ESSENTIALS  
MAY BE CONTRIBUTING TO THE  
ALCOHOL INDUSTRY'S SLUMP**



"As economic constraints have taken effect, IWSR's Bevtrac consumer research shows that **consumers have diverted spending from alcohol to household essentials** – fueling a marked decline in per capita alcohol consumption, which fell below pre-pandemic levels."

- **Richard Halstead**,  
COO Consumer Research, IWSR

**Wine sales**  
decreased by **-8%**  
from 2023 to 2024...



...but **sales of  
prosecco increased  
by +4.7%**, which  
IWSR attributes to its  
relative affordability

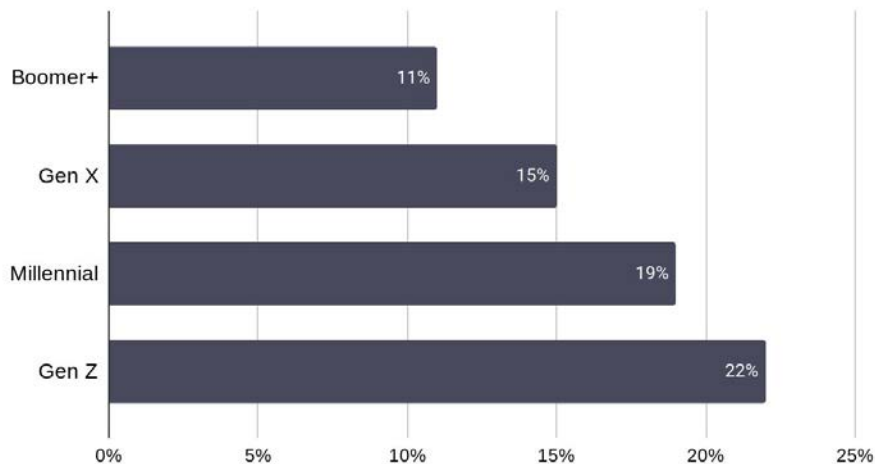
Sources: IWSR Beverage Alcohol Market Report, Aug 2024; Wine & Spirits Wholesalers of America, Oct 2024 Report

# TIPPING TREND: CHANNEL SURFING

IN RESPONSE TO HIGHER PRICES, CONSUMERS ARE SHIFTING WHERE THEY SHOP - ESPECIALLY **YOUNGER CONSUMERS**.



% that shopped at cheaper store in response to inflation



## IMPACT ON SALES GROWTH

Change in Grocery unit sales, 2022-2023

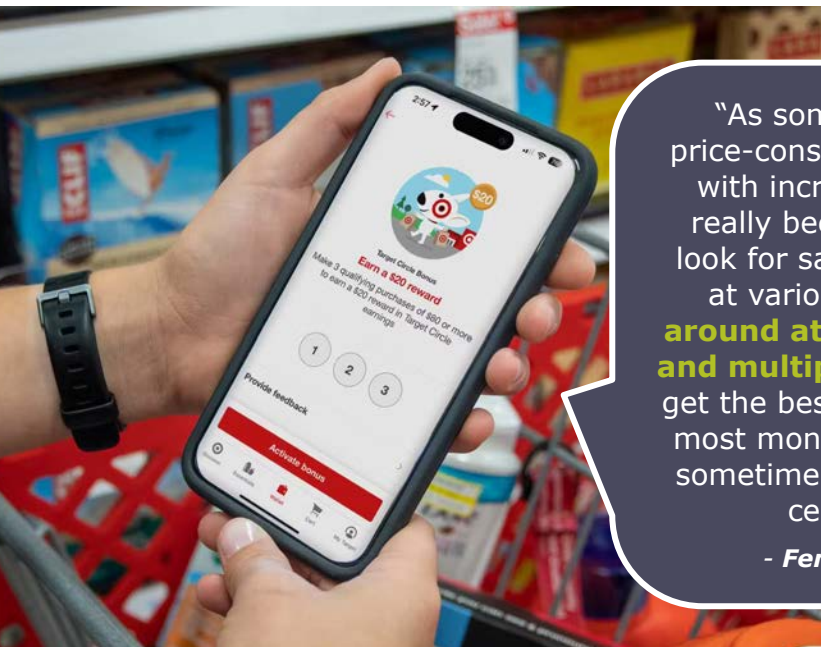
<b>DRUG</b>	-4% or less
<b>FOOD</b>	-1% - 4%
<b>MASS</b>	-1% - 4%
<b>VALUE</b>	+4% or more
<b>ONLINE</b>	+4% or more

Sources: Purdue University Consumer Food Insights, May 2024; McKinsey Report, "Consumers: Spending more to buy less," Feb 2024

## 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

# TIPPING TREND: CHANNEL SURFING

**CONSUMERS ARE WILLING TO SPEND EXTRA TIME TO MAKE SURE THEY'RE GETTING THE BEST PRICE.**



"As someone who's very price-conscious and struggling with increasing prices, I've really been working hard to look for sales and promotions at various stores. **I shop around at multiple websites and multiple stores** to try and get the best deals and save the most money that I can, which sometimes results in forgoing certain items."

- *Female, Millennial*

**45%** of consumers are open to changing stores for greater savings



The fastest growing chain in the US is the discount chain Aldi, with **109** new openings in 2023.

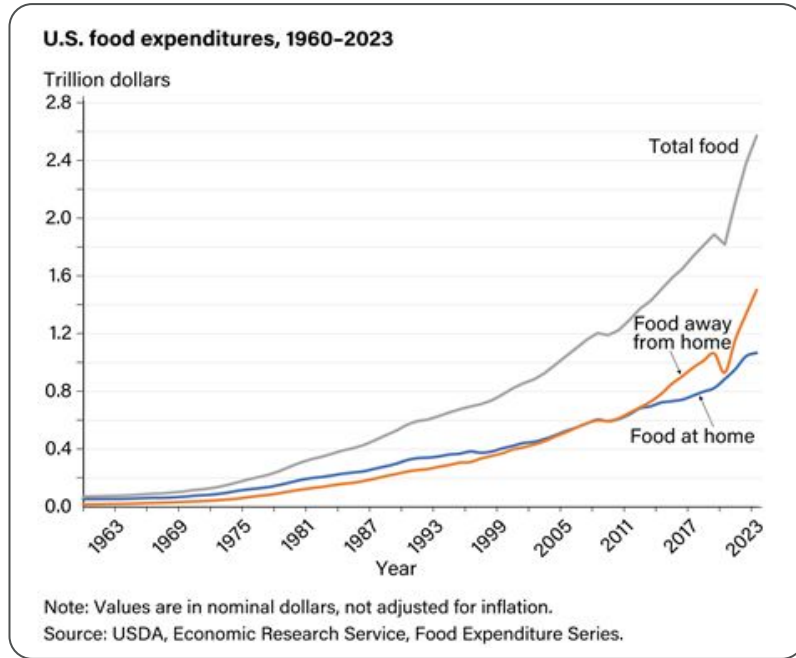


Sources: McKinsey Report, "An update on consumer sentiment," Aug 2024; RRD, 2024 CPG and Grocery Consumer Report

# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

## TIPPING TREND: FAST CASUAL ON THE RISE

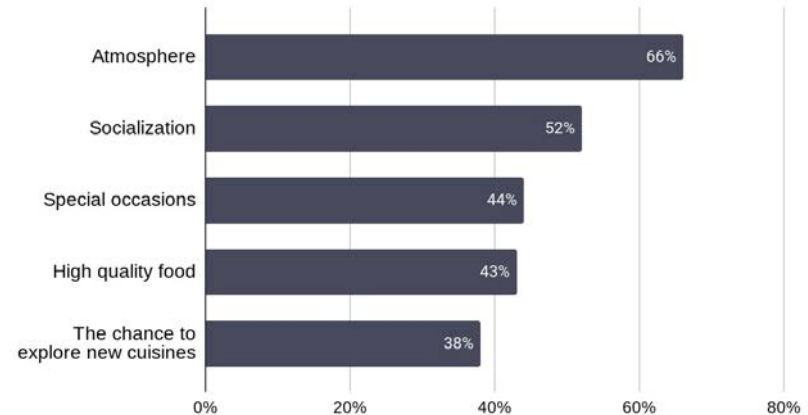
### CONSUMERS CONTINUE TO CRAVE FOOD AWAY FROM HOME DESPITE ECONOMIC CONCERNS



Sources: USDA Economic Research Service (ERS); US Foods Diner Dispatch, 2024



### APPEAL OF DINING OUT



# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

## TIPPING TREND: FAST CASUAL ON THE RISE

**WITH TIGHT HOUSEHOLD BUDGETS, FAST CASUAL PROVIDES A FUN, SOCIAL EXPERIENCE WITHOUT BREAKING THE BANK**

### FAST CASUAL IS BOTH LARGE AND GROWING

	% OF PEOPLE WHO DINE HERE	IFMA 2024 GROWTH ESTIMATE
CASUAL DINING	69%	0.0%
<b>FAST CASUAL</b>	<b>55%</b>	<b>1.3%</b>
FAST FOOD (QSR)	55%	0.7%



**TOP FASTEST GROWING FAST CASUAL CHAINS INCLUDE:**



**Fast casual is benefitting from shifting behaviors due to economic constraints**

**TRADING DOWN**  
from casual dining

**FAST CASUAL**

**TRADING UP**  
from fast food (QSR)

Sources: US Foods Diner Dispatch, 2024 & IFMA 2024 Growth Projections; Yelp, "Top 50 Fastest Growing Brands"; Nation's Restaurant News

# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

## TIPPING TREND: FAST CASUAL ON THE RISE

**THANKS TO FAST CASUAL – AND WITH AN ASSIST FROM QSR AND CASUAL DINING – MALLS ARE BACK**



**yelp**

### Restaurants emerge as the new anchor for mall visits in 2024

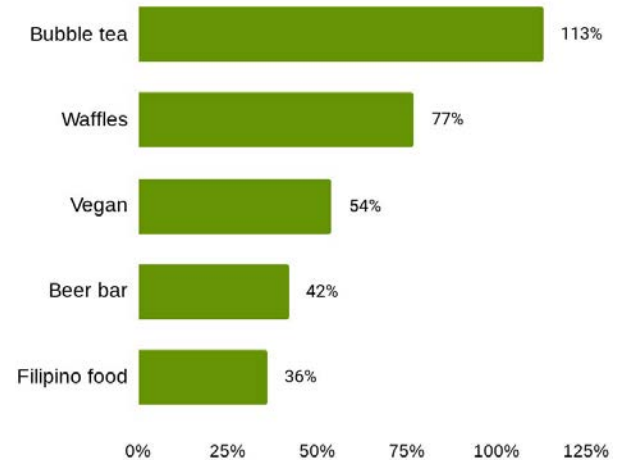
The Cheesecake Factory and newcomer Din Tai Fung top the most popular mall brands

October 2024

### Malls are quietly making a comeback

## 17 of the top 25 most popular mall brands are in the food category

*Restaurant types with the highest growth in mall locations, 2019 - 2024*

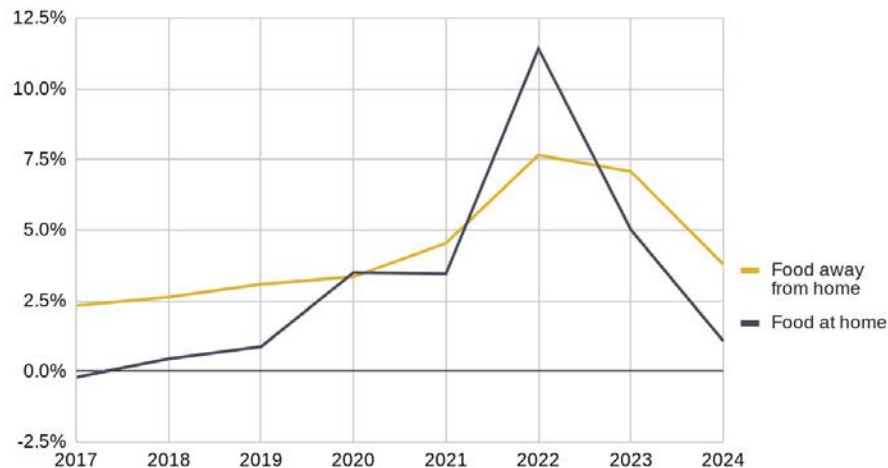


Sources: Yelp, "Evolution of the Mall"; Restaurant Business Magazine

# TIPPING TREND: A TURNING TIDE MEANS SPLURGING

**AFTER NEARLY 5 YEARS OF INFLATION AFFECTING FOOD AND BEVERAGE PRICES, BOTH AT AND AWAY FROM HOME, THE TIDE IS TURNING**

US Food Inflation Rate



Sources: US Bureau of Labor Statistics, Consumer Price Index; Deloitte ConsumerSignals Report, Nov 2024



“Expect financial situation to improve within the next year” **+7PTS**

“Can afford to spend on things that bring me joy” **+10PTS**

“Have money left over at the end of the month” **+12PTS**



# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

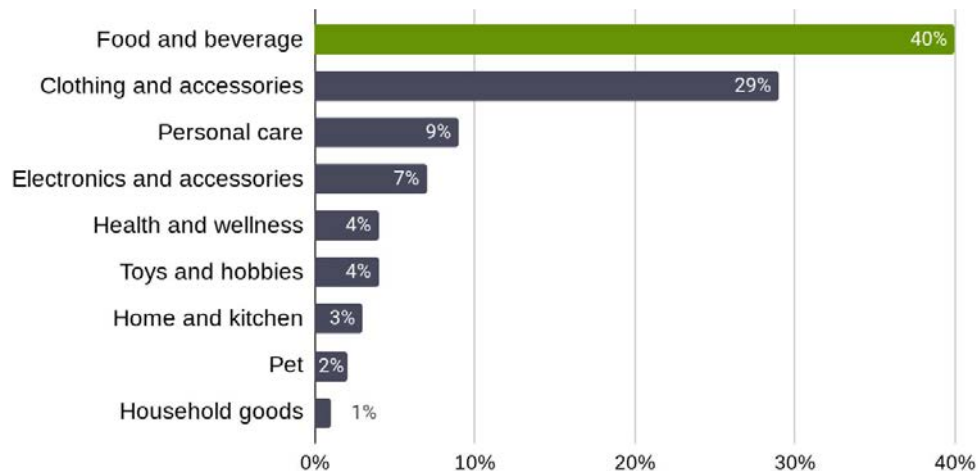
## TIPPING TREND: A TURNING TIDE MEANS SPLURGING

**! THE FIRST PLACE CONSUMERS ARE SPENDING THOSE EXTRA DOLLARS?  
FOOD AND BEVERAGE.**



### SPLURGE CATEGORIES

*% of respondents who made their last splurge purchase in a given category*



Source: Deloitte ConsumerSignals Report, Nov 2024

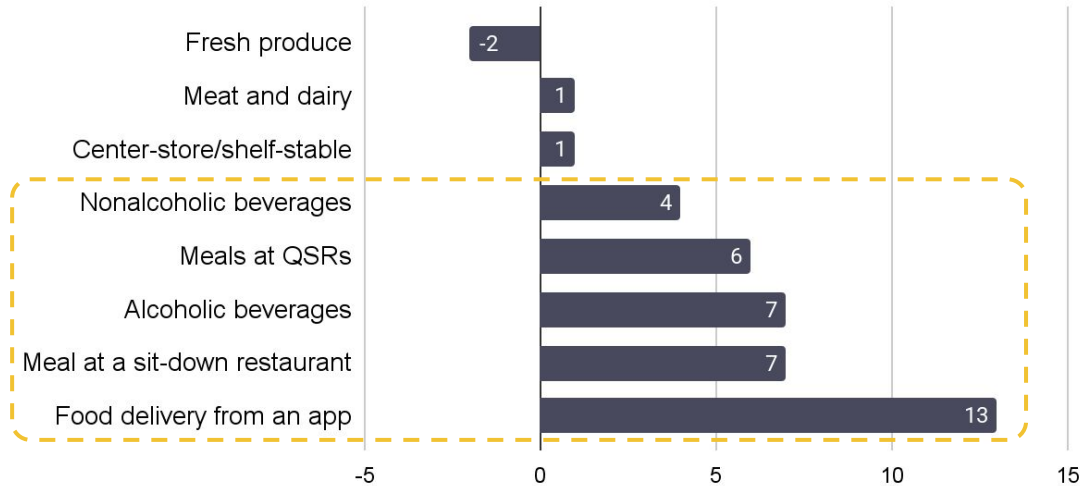
# 2025 MACRO MOVEMENT #3 // THE ECONOMICS OF EATING

## TIPPING TREND: A TURNING TIDE MEANS SPLURGING

**DISCRETIONARY CATEGORIES THAT HAVE STRUGGLED UNDER INFLATIONARY CUTBACKS STAND TO GAIN THE MOST**

### CHANGE IN NET SPENDING INTENT BY CATEGORY

Change from Q2 2024 - Q3 2024 (pts)



“Retail sales in 2025 could see some **overall normalization** following a volatile five-year period. The pandemic affected consumer health, consumer spending behaviors and supply chains. While some impacts of the past half-decade will linger into 2025, Fitch expects much of the recent volatility to dissipate. **Consumers will return to longer-term trends**, such as the quest for value and a focus on experiences like travel and dining out, rather than goods.”

- Fitch Ratings

Sources: McKinsey, “The state of consumer spending in 2024”; Fitch Ratings, “US Retail & Restaurant Outlook 2025”



## 2025 MACRO MOVEMENT #7

# THE LEAN & LONE KITCHEN

For decades, the food and beverage industry has catered to a traditional idea of the American household — think 'family-size' portions and kitchen appliances built for the long haul. But here's the thing: that classic picture of a married couple with 2.5 kids and a white picket fence? It's fading into the past.

Today, households look very different. Families are smaller, single-person households are at an all-time high, and people are redefining what 'home' and 'mealtime' really mean. It's time for food and beverage innovation to reflect these shifting dynamics — because the way we live is changing, and what we eat should change with it.

# TIPPING TREND: THE LONE KITCHEN

30%

U.S. HOUSEHOLDS  
CONSISTED OF

1 PERSON

IN 2020



Source: [U.S. Census Bureau 2023](#)

# TIPPING TREND: THE LONE KITCHEN

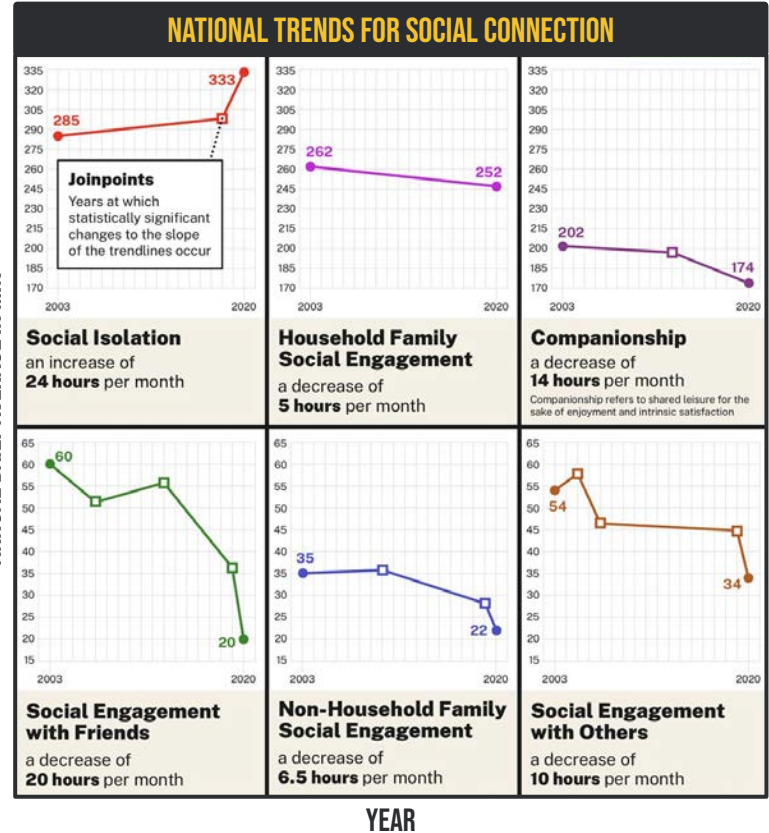


IN 2018, ONLY

**16%**

**OF AMERICANS REPORTED FEELING VERY ATTACHED TO THEIR LOCAL COMMUNITY**

Source: U.S. Surgeon General Epidemic of Loneliness and Isolation



# TIPPING TREND: THE LONE KITCHEN



**POOR SOCIAL  
RELATIONSHIPS  
ARE ASSOCIATED  
WITH**

**+29%**

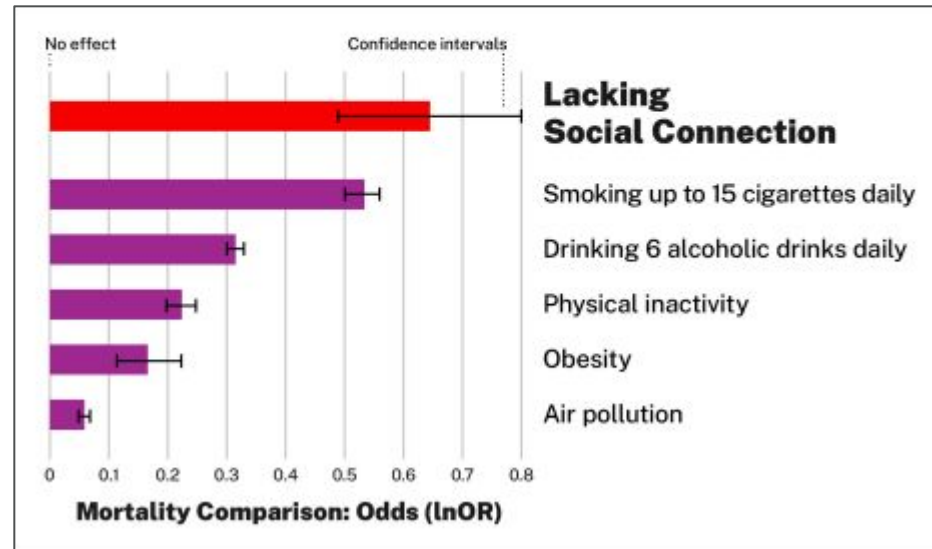
**RISK OF HEART  
DISEASE &**

**+ 32%**

**RISK OF STROKE**



**LACKING SOCIAL CONNECTION IS AS DANGEROUS  
AS SMOKING UP TO 15 CIGARETTES A DAY**



Source: *U.S. Surgeon General Epidemic of Loneliness and Isolation*

## TIPPING TREND: THE LONE KITCHEN

ACCELERATED BY WORK FROM HOME?

**CREATING COMMUNITY** IS MORE IMPORTANT NOW THAN EVER BEFORE

### STARBUCKS' NEW MISSION STATEMENT:

*"To be the premier purveyor of the finest coffee in the world,  
inspiring and nurturing the human spirit —  
one person, one cup and one neighborhood at a time."*



# TIPPING TREND: THE LONE KITCHEN

## CREATING COMMUNITY ONLINE THROUGH FOOD



SHARING VIRAL RECIPES ON SOCIAL MEDIA



LISTENING TO PODCASTS




SHARING FOOD WITH YOUR ONLINE COMMUNITY



# TIPPING TREND: THE LONE KITCHEN

## ACTIVITIES HAVE CHANGED TO ACCOMMODATE THE SOLO LIFESTYLE



A travel advertisement for Morocco featuring a scenic view of the Koutoubia Mosque in Marrakech. The image includes a 'NEW' badge in the top left, a heart icon in the top right, and a '1/4' page indicator in the bottom right.

**Morocco for Solo Travelers: Fes, the Sahara & Marrakech**

11 days | 14 days with Essaouira & Marrakech extension

★★★★★

**SOLO TRAVEL**

FRUGAL TRAVELER


### Thinking About a Solo Cruise? Here's What to Know.

As solo cruising becomes more popular, pricing and cabin types are changing. Deals can be found, especially with advance planning, but it takes a little know-how.



An illustration showing a group of solo travelers on a cruise ship deck. A woman in a white dress and hat stands in the center, flanked by a man in a cap and another man. The background shows a sunset over the ocean with a seagull flying.

**SOLO CRUISES**



A photograph of a restaurant interior showing solo diners at a long bar. A large red circular sign with the number '20' is prominent in the foreground. Other diners and bar stools are visible in the background.

**SOLO DINING**



**ZILLENIALS**

**BETWEEN GEN Z  
& MILLENNIALS**

**TODAY, THEY'RE  
27 - 32 YEARS OLD.**

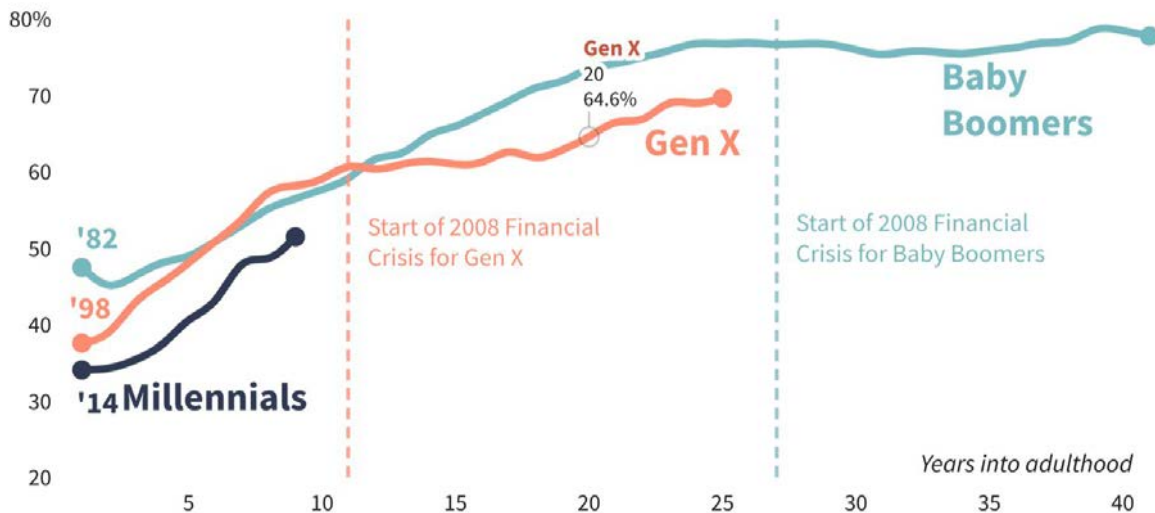
# 2025 MACRO MOVEMENT #7 // THE LEAN & LONE KITCHEN

## TIPPING TREND: ZILLENNIAL HOUSING CRISIS

### MILLENNIAL HOMEOWNERSHIP IS LAGGING BEHIND

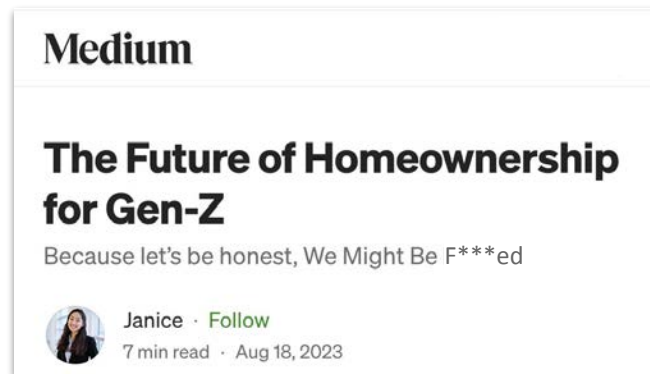
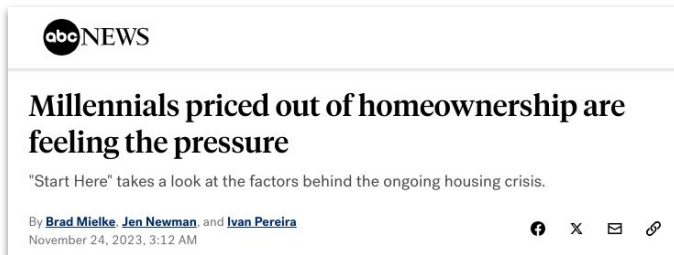
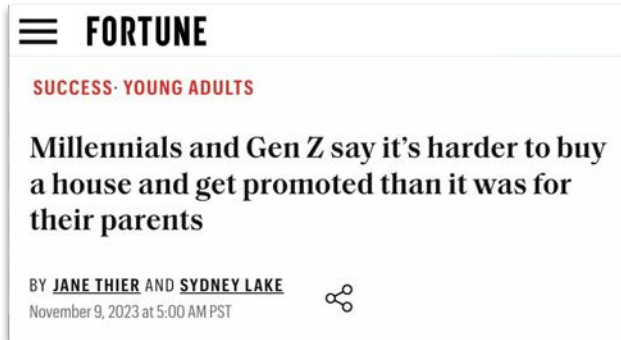


Despite consistent growth, homeownership rates for millennials still lag between five and seven percentage points behind Gen X and baby boomers at the same point in time for each generation.



Source: IPUMS-CPS, University of Minnesota. Chart by Adrian Nesta.

## THE US IS EXPERIENCING A GENERATIONAL HOUSING CRISIS



## TIPPING TREND: ZILLENNIAL HOUSING CRISIS

**MANY FACTORS ARE CONVERGING TO MAKE HOMEOWNERSHIP MUCH MORE DIFFICULT**

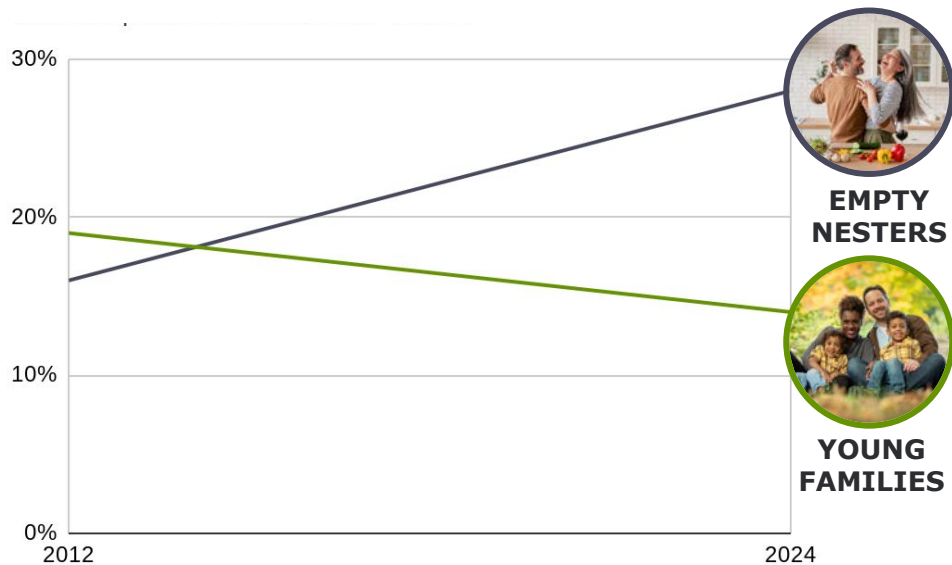


- ➔ **High mortgage rates**
- ➔ **Elevated home prices**
- ➔ **Housing shortage**
- ➔ **Boomer lock-up**

# BOOMERS ARE LOCKING UP HOMES AT RECORD RATES

- More than half have paid off their mortgages
- High interest rates makes purchasing in another location unachievable
- Historically difficult for young families to enter the housing market

## OWNERSHIP RATES OF 3 BEDROOM+ HOMES



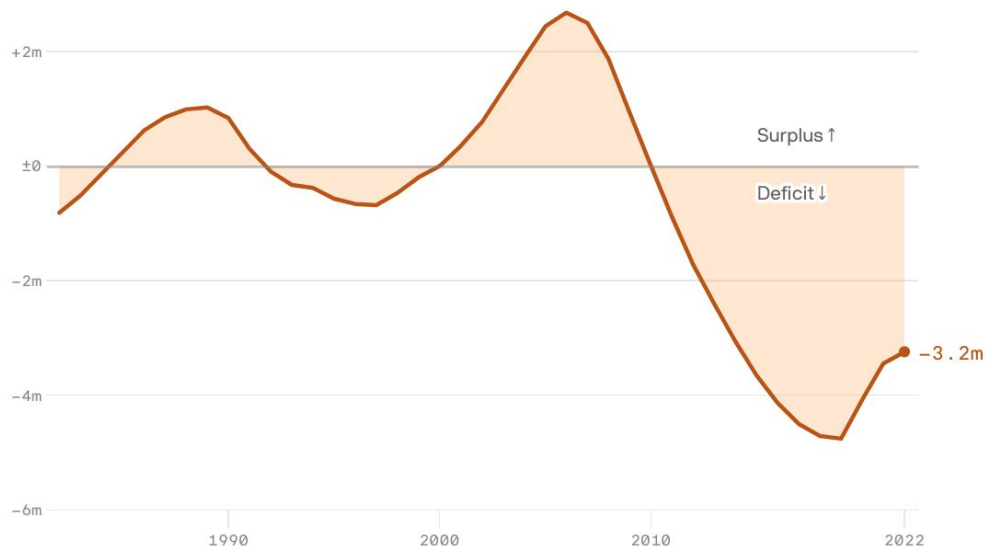
Source: Redfin

# 2025 MACRO MOVEMENT #7 // THE LEAN & LONE KITCHEN

## TIPPING TREND: ZILLENNIAL HOUSING CRISIS

### EXISTING HOUSING UNITS RELATIVE TO POPULATION DEMAND IN THE U.S.

Annually; 1982-2022



America is  
short around

**3.2 MILLION**

homes

Seattle

140,000  
units

NYC

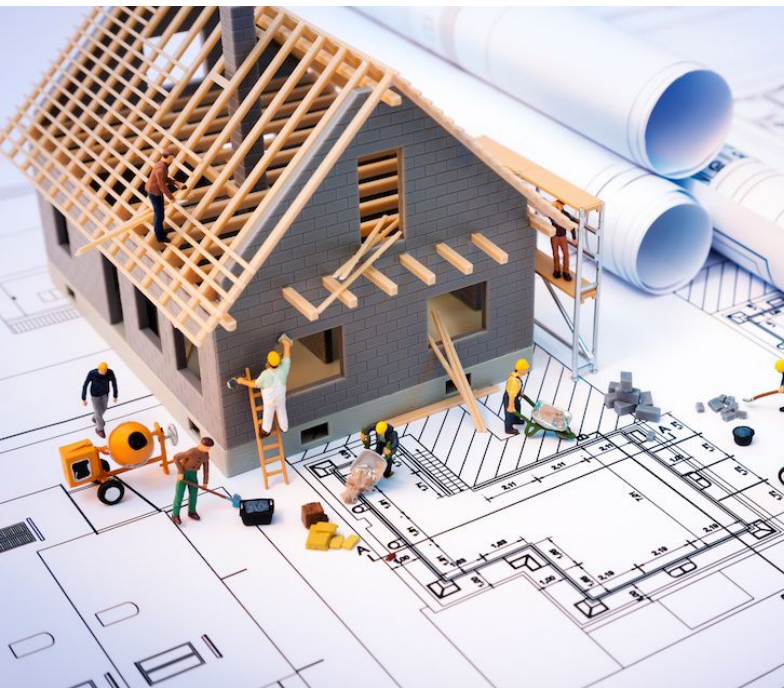
500,000  
units

Bay Area

686,000  
units

Source: Hines Analysis of Census Bureau and Moody's Data. Chart by Axios.

## CONSTRUCTION SPEED HAS DECREASED SIGNIFICANTLY



### IT'S TAKING LONGER TO ADD HOUSING INVENTORY

Average **construction** time for a single-family home has increased by

**+51%**

Average time for **permit** authorization for a single-family home has increased by

**+133%**

*From 1976 to 2022*

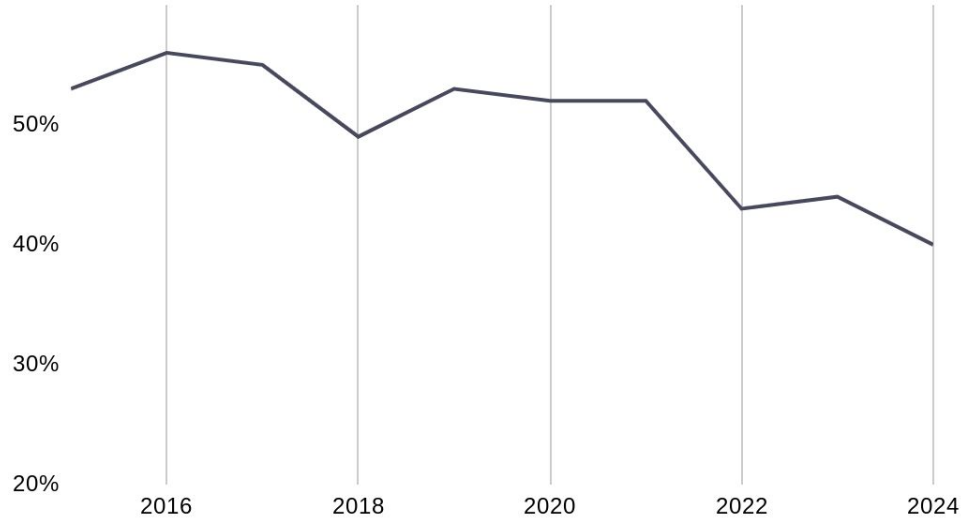


# 2025 MACRO MOVEMENT #7 // THE LEAN & LONE KITCHEN

## TIPPING TREND: ZILLENNIAL HOUSING CRISIS

### RENTERS' HOPES OF BUYING A HOME

Average probability of owning a primary residence at some point in the future



Source: New York Fed Survey of Consumer Expectations



**TIPPING TREND: THE ZILLENIAL HOME**



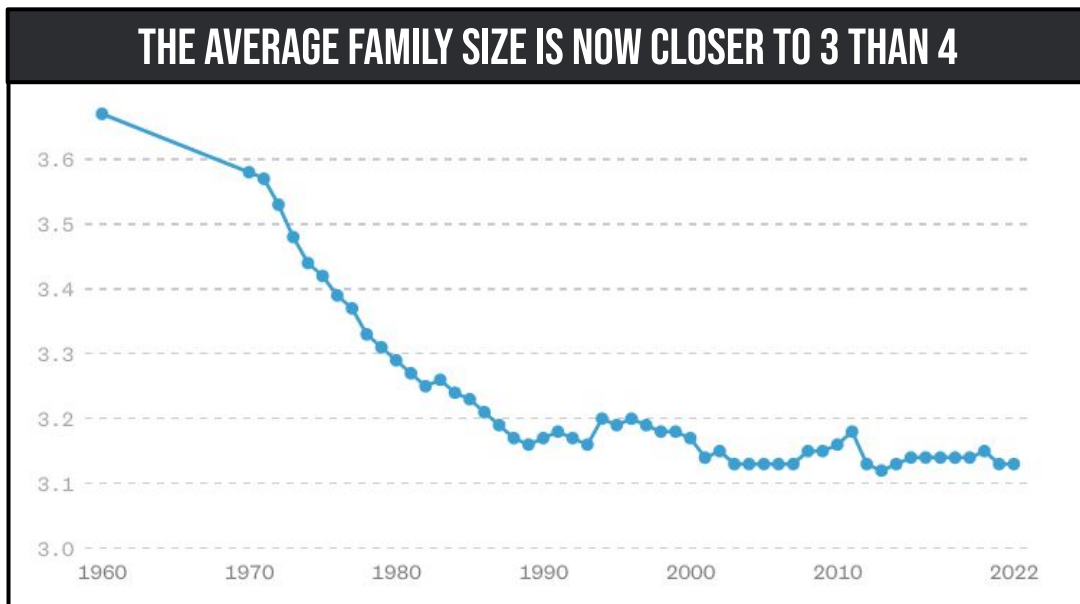
**RENTING IS  
NO LONGER JUST A  
TRANSITIONAL PHASE  
FOR MANY YOUNG  
AMERICANS**

# TIPPING TREND: THE ZILLENIAL HOME

AND THE MODERN FAMILY IS SMALLER THAN EVER BEFORE



THE AVERAGE FAMILY SIZE IS NOW CLOSER TO 3 THAN 4



Source: US Census Bureau

# TIPPING TREND: THE ZILLENIAL HOME

THE AVERAGE YOUNG FAMILY'S KITCHEN IS NOT LIKE YOUR MOM'S KITCHEN

Average  
single-family home  
**2299** ft<sup>2</sup>

Average rental  
**887** ft<sup>2</sup>

Sources: US Census Bureau; Rent Cafe



# TIPPING TREND: THE ZILLENNIAL HOME

## ZILLENNIALS HAVE UNIQUE KITCHEN APPLIANCE NEEDS

**TRADITIONAL OVEN**  
MASSIVE, SLOW TO HEAT = **NO**



**COUNTERTOP OVEN**  
MULTI FUNCTION = **YES**



# TIPPING TREND: THE ZILLENIAL HOME



Small footprint ✓  
Multifunction ✓  
Energy bill savings ✓

**1/2** OF GEN Z BRITS BELIEVE THE KITCHEN OVEN WILL BECOME OBSOLETE AFTER OWNING AN AIR FRYER

Source: The Sun, May 2024

# TIPPING TREND: THE ZILLENNIAL HOME

## THE ZILLENNIAL HOUSEHOLD CAN'T EASILY STOCK UP ON PRODUCTS



# 2025 MACRO MOVEMENT #7 // THE LEAN & LONE KITCHEN

## TIPPING TREND: THE ZILLENNIAL HOME

### MINIMAL STORAGE → ECO-FRIENDLY



60 loads of laundry per refill pouch

+ BLUELAND

+ JOI



Makes 8 quarts of oat milk



Makes 7 quarts of almond milk

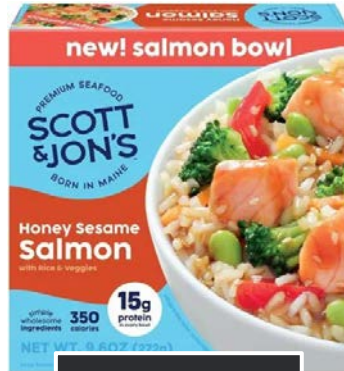


## PACKAGING PORTIONING IS CRITICAL

- Consider **modern household size**
- **Single serve** meals
- If more than a couple of portions, **make it convenient**



+ TAYLOR FARMS  
SINGLE SERVE



+ SCOTT & JON'S  
SINGLE SERVE



+ BIBIGO  
SINGLE SERVE MANDU

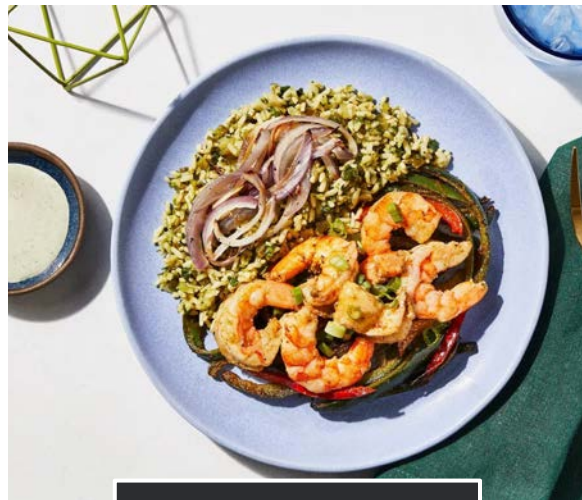


+ DESSERT ITALIANO  
6 INDIVIDUALLY  
PACKAGED SERVINGS

# TIPPING TREND: THE ZILLENNIAL HOME



**+ HELLO FRESH  
MEAL KITS FOR ONE**



**+ FACTOR  
MEAL DELIVERY FOR ONE**



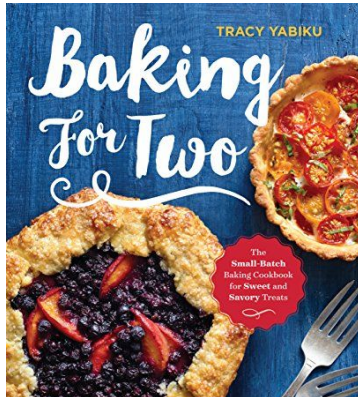
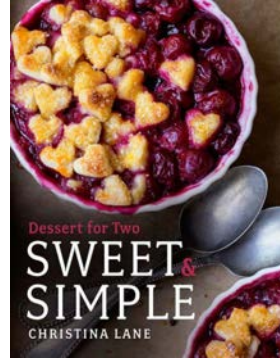
**+ GOOD EGGS  
SMALL COMPLETE  
THANKSGIVING DINNER  
(4 SERVINGS)**



# BRUNCH MEAL KIT FOR ONE?

# 2025 MACRO MOVEMENT #7 // THE LEAN & LONE KITCHEN

## TIPPING TREND: THE ZILLENIAL HOME



**BAKING MIX FOR 2?**

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1. Lunch traffic in restaurants has been hollowed out
2. Morning snack occasion
3. Nighttime treat occasion
4. Beverages as snacks and treats
5. Portion shrinkage
6. Snackification powers WFH
7. Protein powers Snackification

## 02. WEIGHT HEALTH

1. Weight Watchers, repositioned
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2. 3rd Culture Flavors
3. Era Envy
4. Collab Culture
5. Big Brands Gone Wild
6. Food Feelings= Experiential
7. High-Low Dining

## 07. THE LEAN & LONE KITCHEN

1. The loneliness epidemic
2. Zillennial housing crisis
3. The Zillennial home

## 08. BLURRED BOUNDARIES

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2. The Fur Baby
3. Food or Supplement?

# THANK YOU!

**Want to dive deeper into our  
2025 Macro Movements and Tipping Trends?  
Contact us to talk about innovation inspiration for your  
Executive, Innovation, or R&D Team.**

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