



HORIZONS

The Food Foresight Platform powered by Roquette

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Introducing HORIZONS

In today's unpredictable market, amplified by unforeseen crises, innovative approaches are essential for **anticipating and navigating emerging trends effectively**. To address these challenges, **HORIZONS**, the food foresight platform powered by Roquette is committed to shaping the future with strategic foresight.

This process aims to provide a **long-term vision and actionable insights** by exploring various scenarios to create innovative solutions for customers and consumers. It addresses practice gaps by embracing **uncertainty, analyzing driving factors over time rather than specific events, challenging prevailing beliefs and mental models, conducting comprehensive analyses to broaden vision, fostering collaborative interpretation, and prioritizing outcomes over early discussions on methods**.

This structured approach encompasses scanning, trend analysis, scenario planning, and strategic recommendations, facilitating innovative strategic planning to help organizations thrive amid uncertainty and change. Roquette Foresight goes beyond traditional methods by integrating advanced AI tools with expert qualitative analysis, supported by reference academics (EDHEC Business school) creating scenario-driven innovative roadmaps.

More than 200 signals have been detected and encapsulated within the five critical macro drivers: lifestyle shifts, new governance rules, technological enablers, market dynamics, and resource management. The bridge from drivers to consumer trends through related scenarios leads then to new ideas and artefacts of the future.

HORIZONS adeptly navigates future complexities, equipping customers with the levers and insights needed to thrive in an ever-changing landscape.



The process behind HORIZONS

The scenario building process serves as a critical mechanism for bridging the gap between analyzing trends and constructing plausible futures, offering a structured approach that effectively balances complexity with manageability.

Phase 1: Scoping and Scanning for Drivers of Change

The initial phase of scenario planning involves scoping and scanning to identify drivers of change. This step encompasses defining the purpose of the exercise, establishing its boundaries, and collecting data from diverse sources to identify key trends and signals that may impact the future.

Phase 2: Prioritization of Drivers of Change

Subsequently, the process prioritizes the identified drivers of change by concentrating on those characterized by high uncertainty and high impact. This prioritization is essential for determining the factors likely to exert the greatest influence on the organization, followed by generating projections for these prioritized drivers.

Phase 3: Definition and Development of Scenarios

After prioritization, scenarios are defined with varied core elements, and detailed narratives are developed and assessed for implications. To address information overload, an 'in-between' approach is used: scenarios are built through a 'scenario cross,' combining two key drivers to enable focused, comprehensive discussions that guide forward-looking decisions

Phase 4 : Strategy Playbox Construction

In the concluding phase, a strategy playbox is developed. This strategic tool enables the identification of various strategies applicable to different scenarios, including strategies of existing competitors, potential strategies for adoption, and strategies that new entrants might employ to achieve competitive advantage.

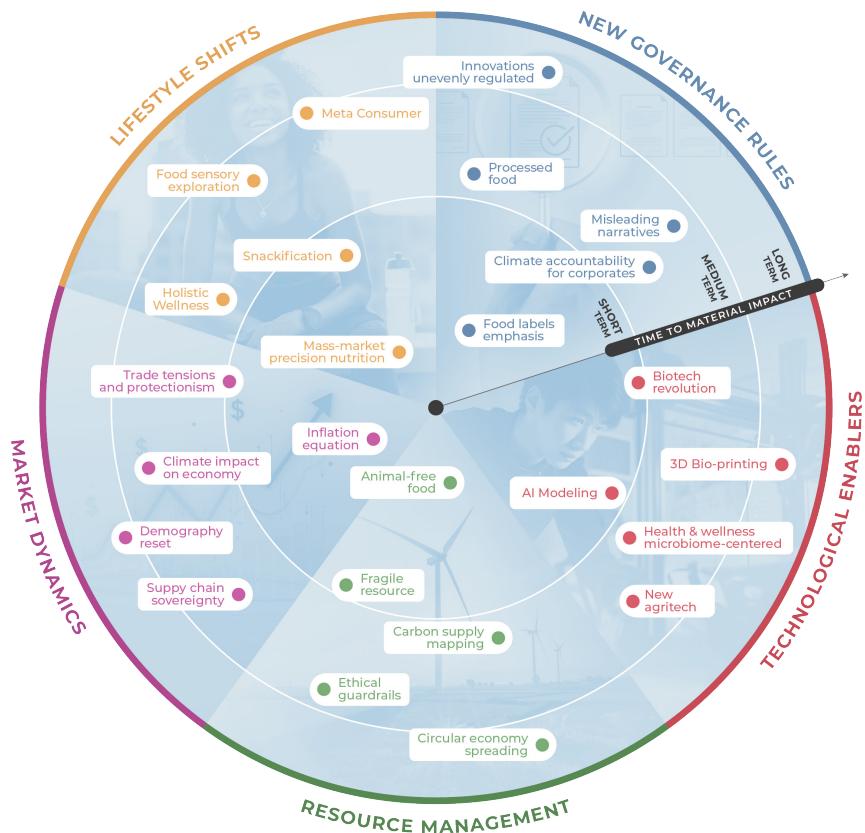
The process behind HORIZONS

The scenario building process serves as a critical mechanism for bridging the gap between analyzing trends and constructing plausible futures, offering a structured approach that effectively balances complexity with manageability.



MACRO DRIVERS RADAR

One of the critical assets of HORIZONS stays the Drivers Radar which is structured around **five essential macro forces** : lifestyle shifts, new governance rules, technological enablers, market dynamics, and resource management. These drivers are crucial for **anticipating systemic changes, guiding innovation, and supporting strategic planning**.



The selection of each individual driver has been based on the main scoring on the two key criterias :

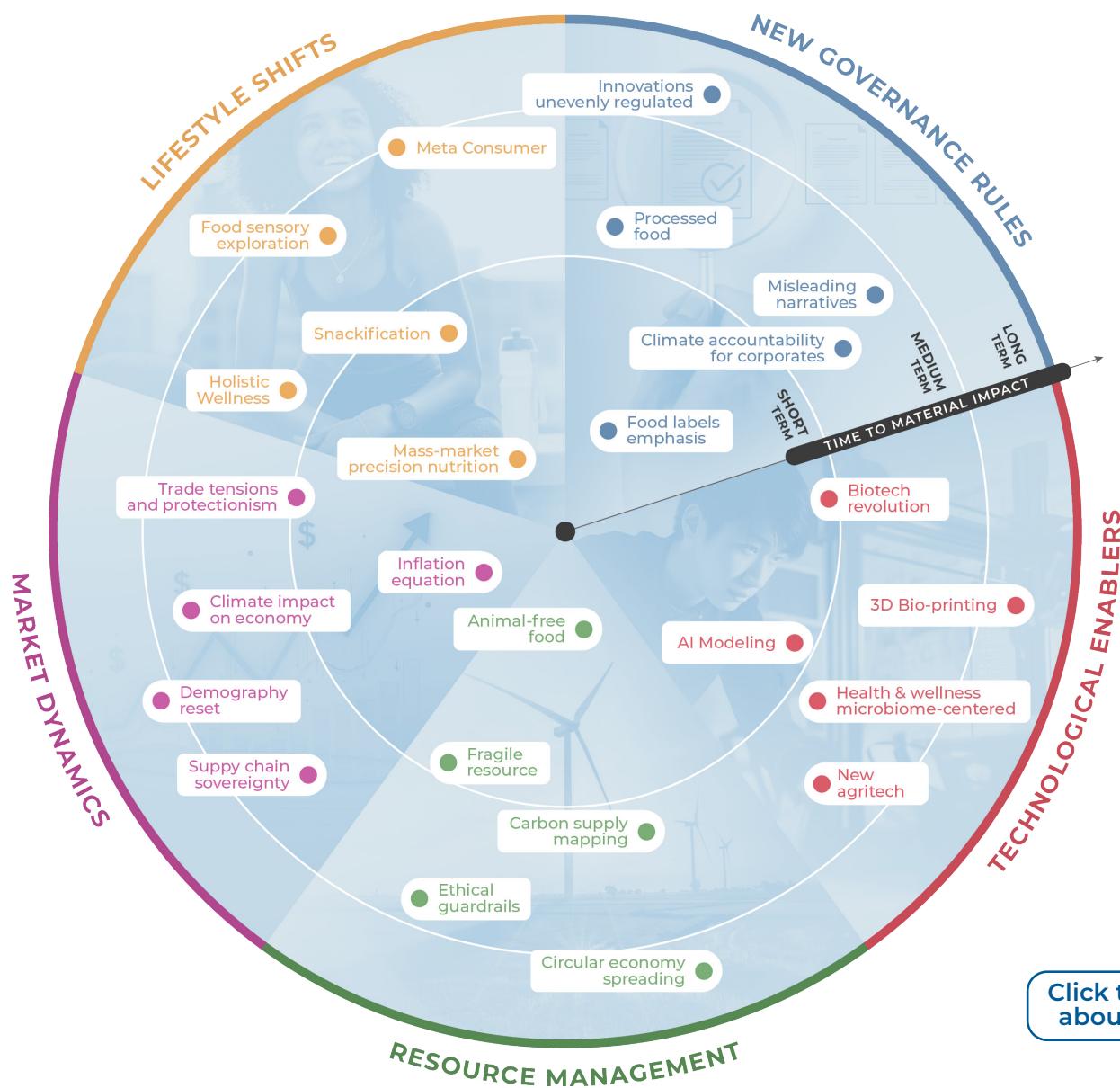
#1 Impact: The degree of influence the trend might have on the food industry across its entire value chain within the next 10 years.

#2 Uncertainty: The confidence in future trend development and its potential impact on the industry.

The position of each circle along its axis reflects the projected time to material impact on food, dividing the radar into three distinct zone:

Short-term impact drivers with current or expected material impact within 5 years.
Mid-term impact within 5-10 years and **Longer-term**, beyond 10 years

MACRO DRIVERS RADAR

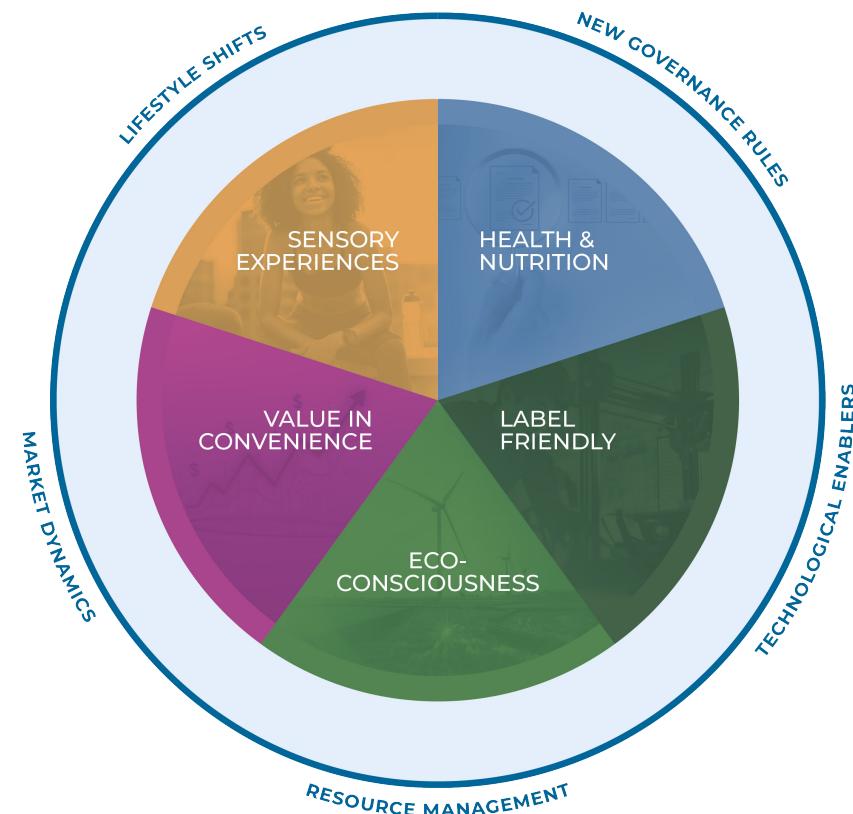


FROM DRIVERS TO CONSUMER

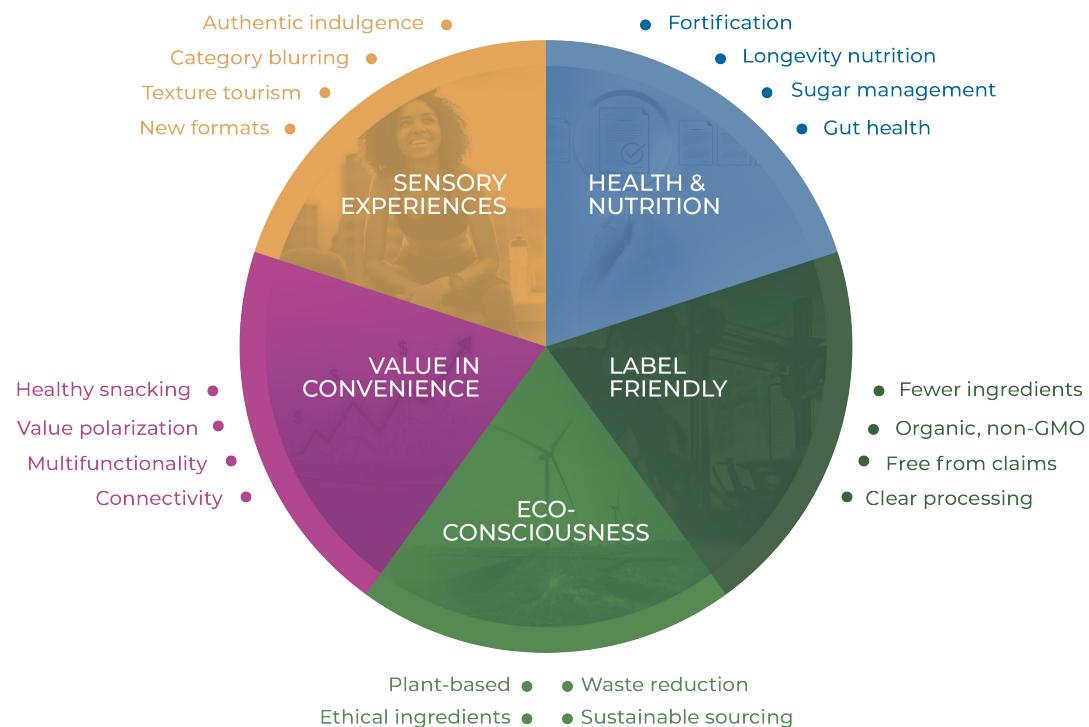
The connection between **consumer trends** and **macro drivers** lies in their complementary roles in shaping business decisions. **Consumer trends** deliver **real-time insights** into evolving preferences and behaviors, enabling companies to adapt quickly to current market demands. **Macro drivers**, on the other hand, reveal the deeper systemic forces that will influence the industry over the long term. By integrating both perspectives, food industry players can remain agile in the short term while building resilience and foresight for future challenges and opportunities.

HORIZONS structures the consumer trends into 5 main families that shape the food consumption :

- Health & Nutrition
- Sensory experiences
- Value in convenience
- Eco-consciousness
- Label Friendly



CONSUMER TRENDS



Click to learn more
about the trends

Sensory experiences focus on celebrating authentic indulgence with traditional flavors, creating hybrid products that blur categories, catering to Gen Z's desire for diverse textures, and developing new on-the-go snacking formats

Health & Nutrition include nutrient rich food from protein and fiber to healthy fat, promotion of lifelong health through nutrition, providing reduced sugar options for better diets, and enhancing gut health for improved digestion and overall wellness

Label Friendly stays a first lever to enter into a more sustainable world, emphasizing shorter, simpler ingredient lists, organic and non-GMO products for health and ethical reasons, allergen-free claims, transparency and clear, gentle processing methods.

Eco-consciousness consumer priorities include choosing plant-based products for reduced environmental impact, minimizing waste through regenerative agriculture or day to day portion management, using sustainably sourced ingredients, and ensuring ethical and transparent sourcing practices.

Value in convenience deals with products through new nomadic lifestyle, balancing premium and cost-effective choices, offering multifunctional health benefits, and creating collaborative spaces that blend physical and digital interactions, emphasizing human experience in the AI era.

THE SCENARIOS

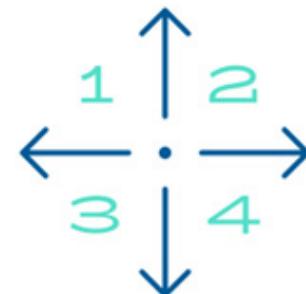
Why use scenarios?

Scenarios offer a **structured framework** for the food industry and its stakeholders to **anticipate key drivers of change and uncertainty**. By examining future visions, organizations can identify emerging trends and adopt a **forward-thinking approach to innovation**.

Scenarios are constructed using structural axes—**regulation and consumer behavior**—selected for their relevance, high impact, and elevated uncertainty within the industry and global context.

Regulation Led approaches prioritize science-based standards, foster policy-driven innovation, rely on trusted systems, encourage coordinated action, and strive for equity through compliance.

Proactive Consumption involves making values-led choices, staying informed and engaged, prioritizing personalized nutrition, advocating for transparency, and ensuring lifestyle alignment.

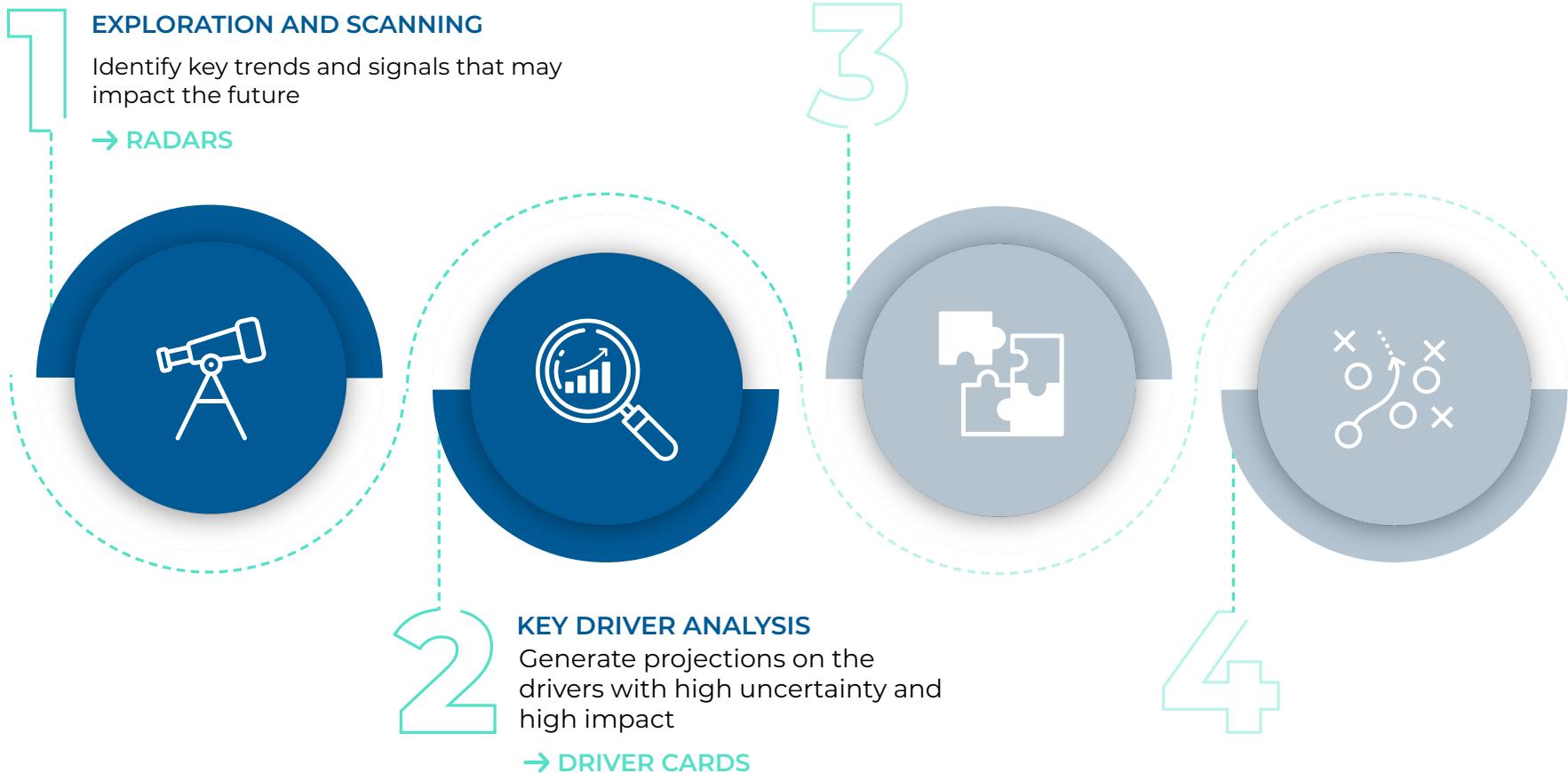


Market Led dynamics are characterized by demand-driven change, competitive innovation, brand-led trust, fragmented systems, and fast, uneven adoption.

Reactive Consumption often manifests as crisis-driven behavior, where familiarity takes precedence over novelty, accompanied by mistrust and caution, health panic loops, and a focus on short-term adaptation.



Use Case: When Precision Nutrition Meets Home



● MASS-MARKET PRECISION NUTRITION

A fundamental shift from generic nutritional guidance to highly personalized approaches based on individual biological responses, metabolic profiles, and pharmaceutical interventions, creating new product categories and service ecosystems.

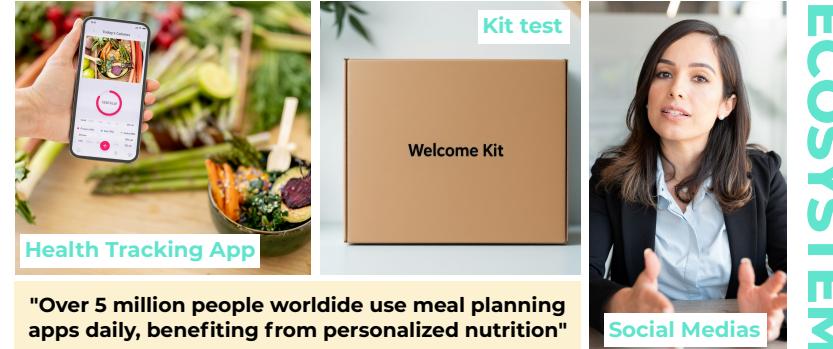
50%

of consumers globally say:

“I am eager to try personalized nutrition solutions.”¹

As functional nutrition evolves, brands should **combine high nutritional value with other innovation** such as gut-friendly prebiotics, adaptogens for stress support, or personalized formats **to deliver layered benefits**. **Clear, targeted claims** can enhance **credibility** and **consumer connection**.

Innova, June 2025



ECOSYSTEM

TECHNOLOGY-DRIVEN PERSONALIZATION

Mobile health apps and wearables use AI and health data to deliver **personalized diet plans and real-time coaching**.

At-home genetic and microbiome tests offer **tailored diet and supplement advice based on individual markers**, now widely available online and in pharmacies.

Some companies also offer **personalized supplements** with subscription-based delivery.

FROM DRUGS TO FUNCTIONAL FOODS: GLP-1 EXAMPLE

GLP-1 is a gut hormone used in **weight and diabetes treatments**. Its receptor agonists reduce appetite and slow digestion, **requiring tailored nutrition to maintain nutrient intake**.

The global GLP-1 market is growing rapidly due to **rising obesity, diabetes, and broader therapeutic use**. It's projected to grow from **\$52B** in 2024 to four times that by 2035.²



Balanced nutrition to maintain healthy bones, muscles and joints at any age.

example of product generated by IA

Adaptogenic mushrooms in dark chocolate offer antioxidant-rich, jitter-free energy, delivered with **transparency and backed by science**

example of product generated by IA

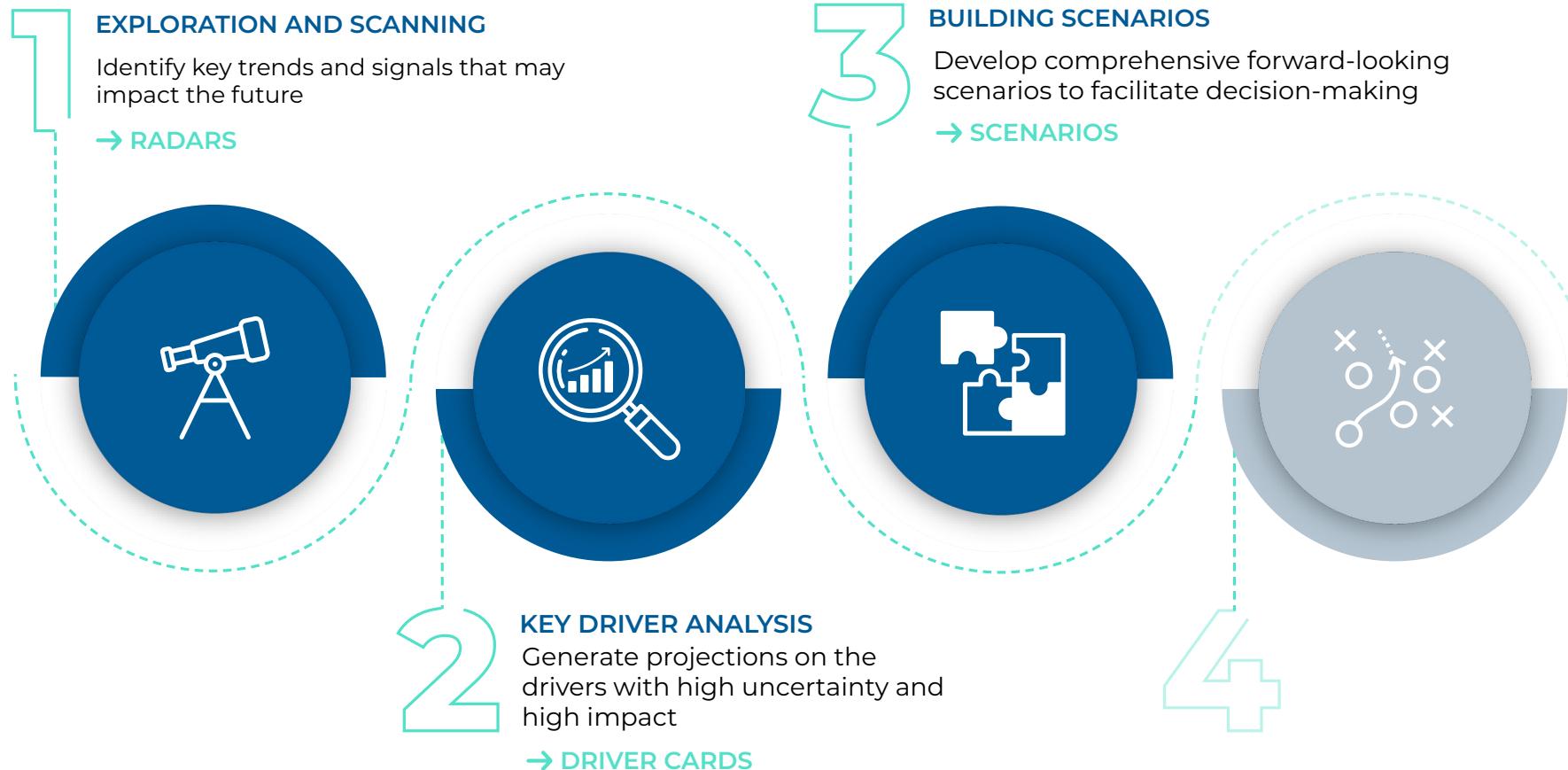


WHAT'S ON THE HORIZON?

Functional foods are shifting toward tasty, **convenient** formats like gummies, beverages, and chocolates, combining science-backed ingredients with improved taste and clean labels. Healthy and **indulgence** are not anymore contradictory.

Both the medical and business worlds **integrate generative AI** more efficiently to unlock novel anti-ageing interventions and truly personalized approaches based on health ambitions, lifestyle and biology.

Use Case: When Precision Nutrition Meets Home



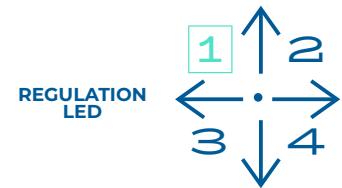
NUTRITIONAL ACCORD

A world where science-backed innovation is embraced and guided by policy.

Consumers trust and adopt precision-engineered ingredients be it for plant-based nutrition or pharmaceutical delivery systems. Regulation ensures safety, equity, and environmental responsibility.

SCENARIO 1

PROACTIVE CONSUMPTION



PROACTIVE CONSUMPTION: Values-led choices | Informed & engaged | Personalized nutrition | Advocacy & Transparency | Lifestyle alignment

REGULATION LED: Science-based standards | Policy-driven innovation | Trusted systems | Coordinated action | Equity through compliance

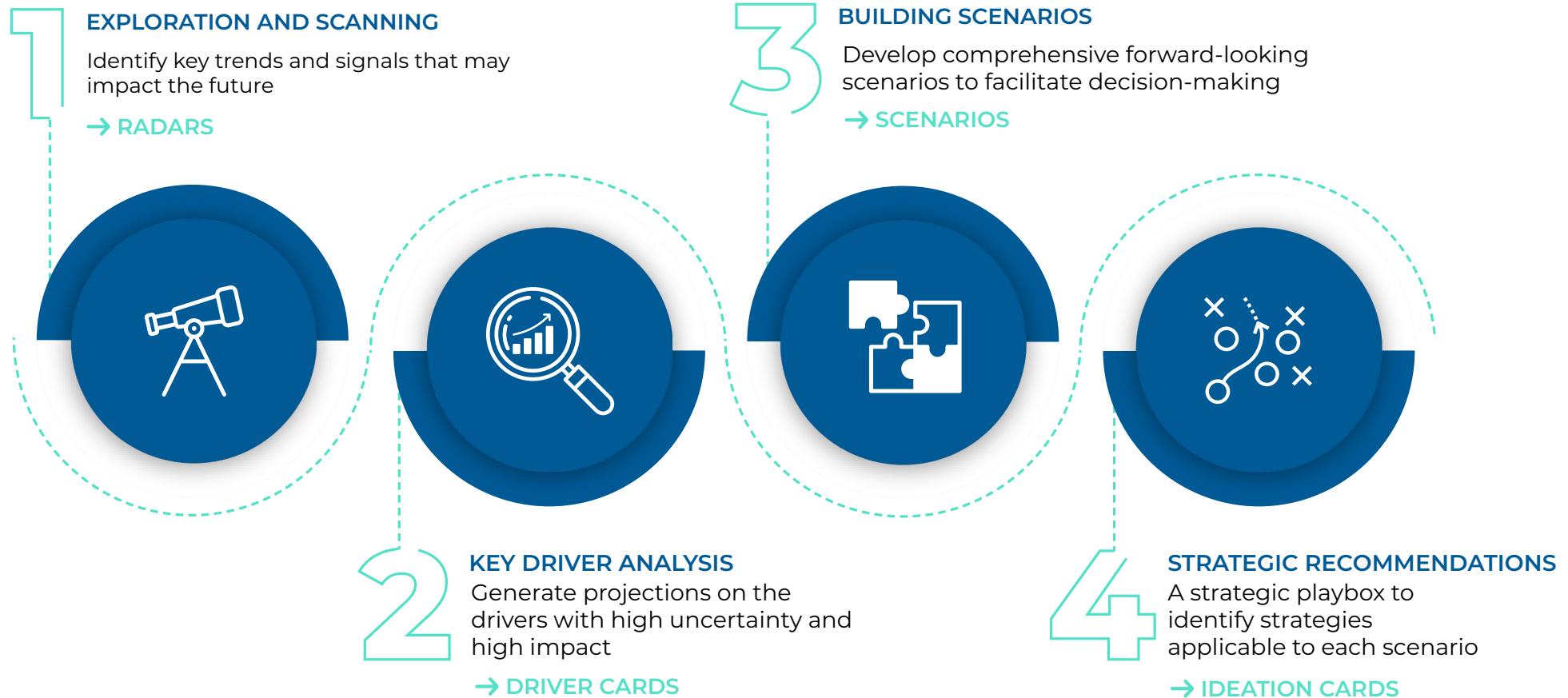
A GLOBAL COMMUNITY ACTS AS A MOTOR OF CHANGE, INNOVATION IS REGULATED

- Consumer Behavior:** Consumers are leading the change with proactive engagement, embracing food innovations and tailoring their diets for health and sustainability.
- Agricultural Practices:** Precision agriculture, automation, and vertical farming revolutionize farming practices, reducing environmental impact.
- Food Systems:** Processed and synthetic foods gain acceptance due to enhanced health profiles and sustainability benefits.
- Economic Structures:** Cross-industry collaboration reshapes economic structures, focusing on nutrient-dense foods as affordable and accessible norms.
- Regulation:** Governments enforce circular economy models and incentivize regenerative practices, creating globally aligned food laws.



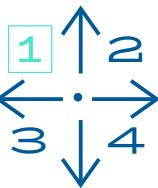
KEYWORDS
EQUITY FIRST
HIGH ADOPTION
TRUSTED SYSTEMS
SUSTAINABLE INNOVATION
SCIENCE-BACKED
POLICY-ALIGNED
PRECISION NUTRITION

Use Case: When Precision Nutrition Meets Home



ULTRA-PERSONALIZED HEALTH EXPERIENCE

Powered by real-time biometric data and smart technology, this ultra-personalized health audit transforms everyday wellness into a tailored experience.



IDEATION

PRECISION WELLNESS DELIVERED DAILY

3.6 BILLION

projected downloads of health and fitness app in 2024¹⁰

Connected devices are reshaping mass-market nutrition by collecting personal health data and enabling tailored recommendations.

However, consumers still lack easy access to convenient, personalized dietary solutions.

INNOVATION OUTLOOK

SMART DIETARY SUPPLEMENT DISPENSER

Designed for home use, this device delivers concentrated powdered supplements, personalized and adjusted daily through health data from smartwatches and user inputs via an app. Provides a precise, accessible nutrition experience tailored as users' needs evolve.

FROM MANUFACTURER TO HEALTH SOLUTIONS PROVIDER

Position the brand as a leading health solutions provider, available both in pharmacies and online, under a strong new identity that signals innovation, trust, and accessibility.

THOUGHTS FOR ACTIVATION

Partner or acquire a B2C Nutra Company

Collaborate with start-ups specializing in digital devices and data processing

Accelerate innovation based on evolving consumer needs

Use Case: When Precision Nutrition Meets Home

1 EXPLORATION AND SCANNING

Identify key trends and signals that may impact the future

→ RADARS



● MASS-MARKET PRECISION NUTRITION
A fundamental shift from generic nutritional advice to highly personalized approaches based on individual biological responses, metabolic profiles, and pharmaceutical interventions, creating new product categories and service ecosystems.

50% of consumers globally say: "I am eager to try personalized nutrition solutions."

TECHNOLOGY-DRIVEN PERSONALIZATION
Mobile health apps and wearables use AI and health data to deliver personalized diet plans and real-time coaching. At-home genetic and metabolomics tests offer tailored diet and supplement recommendations. Personalized nutraceuticals are available online and in pharmacies. Some companies also offer personalized supplements with tailored dosages based on individual health needs.

FROM DRUGS TO FUNCTIONAL FOODS: GLP-1 EXAMPLE
GLP-1 is a gut hormone used in weight and diabetes treatments. It regulates appetite, reduce appetite and slow digestion, creating ultra-lean nutrition to maintain healthy intake. The gut microbiome is changing rapidly due to rising obesity, diabetes, and breast cancer. The market for functional approaches based on health ambitions, lifestyle and behavior.

WHAT'S ON THE HORIZON?
Functional foods are shifting toward transparency and accountability. New technologies are being developed and adopted, combining science-backed nutrition with AI and machine learning to create a more personalized experience. Some companies are also exploring AI to enhance transparency and consumer connection.

Source: Roquette Internal Data, 2019. © Roquette Frères S.A. 2020. Roquette Horizons™ Scenarios

2 KEY DRIVER ANALYSIS

Generate projections on the drivers with high uncertainty and high impact

→ DRIVER CARDS

3 BUILDING SCENARIOS

Develop comprehensive forward-looking scenarios to facilitate decision-making

→ SCENARIOS

NUTRITIONAL ACCORD

A world where science-backed innovation is embraced and guided by policy. Consumers trust and adopt precision-engineered ingredients for plant-based nutrition or pharmaceutical delivery systems. Regulation ensures safety, equity, and environmental responsibility.

REGULATORY LED: SCIENCE-BASED STANDARDS
Policy-driven innovation. House systems. Coordinated action. Safety through consistency.

SCENARIO 1: PROACTIVE CONSUMPTION
INNOVATION → INTEGRATION → REGULATION → PROTECTION

A GLOBAL COMMUNITY ACTS AS A MOTOR OF CHANGE, INNOVATION IS REGULATED

- Consumer Behavior: Consumers are leading the change, with proactive engagement, embracing food innovations and tailoring their diets for health and sustainability.
- Agricultural Practices: Precision agriculture, automation, and vertical farming are reshaping the food system, reducing environmental impact.
- Food Systems: Processed and synthetic foods gain acceptance due to their health profiles and sustainability benefits.
- Economic Structures: Cross-industry collaboration reshapes economic structures, focusing on nutrient-dense foods as efficient health solutions.
- Regulation: Governments enforce circular economy models and incentivize regenerative practices, creating globally aligned food laws.

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4 STRATEGIC RECOMMENDATIONS

A strategic playbox to identify strategies applicable to each scenario

→ IDEATION CARDS

ULTRA-PERSONALIZED HEALTH EXPERIENCE

Powered by real-time biometric data and smart technology, this ultra-personalized health audit transforms everyday wellness into a tailored experience.

PRECISION WELLNESS DELIVERED DAILY
Connected devices are reshaping how we monitor our health data and enabling tailored recommendations.

SMART DIETARY SUPPLEMENT DISPENSER
Designed for home use, this device delivers personalized powdered supplements, personalized and adjusted daily. Delivers the right amount of nutrients through a mobile app. Provides a precise, accessible nutrition experience tailored to user needs.

FROM MANUFACTURER TO HEALTH SOLUTIONS PROVIDER
Position the brand as a leading health solutions provider, available for both B2B and B2C. Leverage partnerships and strategic alliances to bring new성이 signals innovation, trust, and accessibility.

THOUGHTS FOR ACTIVATION
Partner or acquire a 3D Nutr. Company. Collaborate with start-ups specializing in digital devices and data processing. Accelerate innovation based on evolving consumer needs.

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MACRO DRIVERS RADAR

Lifestyle shifts

● Meta consumer

The integration of digital and physical food experiences boosts convenience, transparency, and personalization through advanced technology.

● Mass market precision nutrition

Shift from generic nutrition advice to tailored solutions based on an individual's biology, fueling new personalized products and services.

● Snackification

Traditional meals are evolving into flexible, nutrient-rich snacks, driven by mobile lifestyles and changing family dynamics.

● Food sensory exploration

Gen Z pursues novel, authentic food experiences that balance value and premium quality, increasing demand for innovative products and experiences.

● Holistic wellness

Consumers evaluate food quality across multiple factors, seeking options that support long-term wellness and specific life-stage needs.

New governance rules

● Food labels emphasis

Governments prioritize resilient, transparent food systems through circular policies and enhanced traceability.

● Climate accountability for corporates

Climate finance is shifting from voluntary action to mandatory regulations, introducing direct penalties for environmental harm through litigation and targeted taxes.

● Processed food

Regulatory efforts—via labeling, legislation, and fiscal guidelines—intensify support for healthier diets, focusing on low processed and non-GMO foods.

● Misleading narratives

Regulations now demand credible, evidence-based claims, countering misleading marketing and enhancing public trust in food systems.

● Innovations unevenly regulated

Global market access for food innovation is shaped by strict EU regulations and more flexible frameworks elsewhere, directly impacting the introduction of novel, biotech, and GMO products.

Go back to the
radar



MACRO DRIVERS RADAR

Market dynamics

● Trade tensions and protectionism

Protectionist policies create supply chain, cost, and investment shifts, requiring industries to adapt to tariffs and export controls.

● Inflation equation

Consumers optimize spending by shifting purchasing across categories, boosting both premium and entry value segments and influencing product development ROI.

● Supply chain sovereignty

To enhance resilience, companies pay more for diversified, redundant supply chains and regional strategies, accepting higher costs for stronger performance.

● Demography reset

Aging developed-world populations create labor gaps, while rapid middle-class growth in emerging markets reshapes economic and workforce dynamics globally.

● Climate impact on economy

Climate volatility affects commodity pricing; companies harnessing AI and satellite forecasts gain margin advantages over traditional competitors in the food industry.

Technological enablers

● AI modelling

AI, quantum computing, and simulation technologies accelerate food R&D, improving product design, bioprocessing, and crop optimization.

● Health and Wellness microbiome-centered

Nutrition innovation increasingly targets the gut microbiome, using advanced technologies for personalized health interventions beyond traditional probiotics.

● New agritech

Integrated agritech ecosystems leverage genetics, AI, and satellite imaging to boost crop performance, democratizing access to precision farming models.

● 3D bio-printing

Specialized 3D printing creates living food structures, mimicking natural tissues for innovative consumer products.

● Biotech revolution

Advanced strain engineering, automation, and precision fermentation drive cost-effective, scalable biotech solutions across food production.

Go back to the
radar

MACRO DRIVERS RADAR

Resource management

● Circular economy spreading

Businesses adopt regenerative and upcycling models, redesigning supply networks to cut emissions and promote local, sustainable sourcing.

● Ethical guardrails

Consumer demand for transparency and accountability leads companies to establish governance frameworks balancing innovation, trust, and ethical responsibility.

● Animal-free food

Plant-based diets go mainstream; emerging solutions like precision fermentation and cellular meat rise, linking health, welfare, and sustainability.

● Fragile resource

Companies integrate climate strategies into operations, focusing on ecosystem protection, water stewardship, and microplastic reduction for greater sustainability.

● Carbon supply mapping

Firms reconfigure supply chains to lower carbon footprints, prioritize local sourcing, and adopt sustainable practices, driving new financial models.

Go back to the
radar



CONSUMER TRENDS

Sensory Experiences

Authentic indulgence

Embrace indulgent food experiences highlighting traditional flavors, the beauty of imperfection, and a bit of nostalgia.

Category blurring

Create hybrid products by merging distinct categories, such as foodservice with retail or indulgence with functionality.

Texture Tourism

Offer diverse textural experiences to meet growing consumer curiosity, especially among Gen Z.

New formats

On-the-go lifestyles drive demand for convenient snacking and novel consumption formats.

Health & Nutrition

Fortification

Functional foods packed with macro and key micro nutrient from protein, fiber, healthy fats, biotics to essential minerals.

Longevity nutrition

Focus on nutrition solutions that promote health and longevity throughout all life stages.

Sugar management

Provide reduced sugar or no added sugar options that enable healthier eating habits.

Gut Health

Prioritize gut-friendly foods to deliver better digestion and holistic wellness.

Go back to the
radar

CONSUMER TRENDS

Value in Convenience

● Healthy snacking

Support active lifestyles with nutritious and convenient snack options designed for wellness.

● Value polarization

Address polarized shopper preferences between premium nutrition and cost-saving choices.

● Multifunctionality

Deliver products with multiple health or functional benefits, often combining diverse bioactive ingredients.

● Connectivity

Create collaborative spaces merging digital and physical experiences, elevating human connection in an AI-driven age.

Label Friendly

● Fewer ingredients

Develop products with shorter, simpler ingredient lists to meet demand for transparency.

● Organic, non-GMO

Offer organic and non-GMO products, appealing to health and environmental consumer preferences.

● Free-from claims

Provide allergen-free products, emphasizing health, transparency values.

● Clear processing

Ensure transparent, gentle processing methods that are easily understood and trusted by consumers.

Go back to the
radar

CONSUMER TRENDS

Eco Consciousness

● Plant based

Promote plant-based products that lower environmental impact and support animal welfare.

● Waste Reduction

Minimize food and packaging waste as a core driver of sustainability strategies.

● Ethical ingredients

Source ingredients sustainably and ethically, catering to consumers who value responsible farming practices.

● Sustainable sourcing

Prioritize eco-friendly, transparent, and fair sourcing practices across the supply chain.

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radar



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