

INNOVATION - WHO DECIDES?

BUILDING THE BRIDGE BETWEEN TRENDS & TODAY



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WHAT DO WE MEAN BY "TREND" @ MDLZ



We should be able to **observe** the trend within a **meaningful period** so that we have time to **react to it**.

Trend describes **sustained direction**, excluding cyclicality and fluctuation. I.e., **inflation** is not a trend, but **increasing market volatility** is.

Trend is the articulated **change from – to**. Trend description contains the information about what changes, how, and why.

TREND IS A SUSTAINED DIRECTION OF CHANGE THAT CAN MATERIALLY IMPACT THE FUTURE IN A CONTEXT

The impact will **noticeably** change **the future state** of the subject of our interest.

Context is defined by the **subject**, **geography**, and **time horizon**.

For trends in MDLZ Trend framework, the context is **the future of food and snacking within the next decade**.

A TREND IS LIKE A WIND: WE OBSERVE ITS MANIFESTATIONS



Manifestations are the tangible, observable expressions of the trend, while a trend is the sustained direction of change AND the underlying forces driving this change. Manifestations are **WHAT** is changing, while the trend is also **WHY** it happens.

MACRO TRENDS

HEALTH AND WELLBEING UBIQUITY

RESURGENCE OF EXPERIENCE ECONOMY

TRENDS

INCREASING POPULARITY OF **FUNCTIONAL INGREDIENTS** AND **SOPHISTICATION OF FUNCTIONAL NEEDS LANDSCAPE**

INCREASING POPULARITY OF **ELEVATED SENSORY EXPERIENCES** THROUGH **CREATIVE COMBINATIONS OF FLAVOURS, TEXTURES AND INGREDIENTS**

SIGNALS / MANIFESTATIONS

Protein Craze



Next Atlas Insight

Hitting protein targets becomes the new badge of health literacy. Meeting personal protein targets is gaining traction as a health literacy marker. From protein-rich foods to meal planning, achieving protein...

2025-07-10

Mood Boost

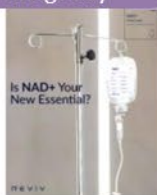


Next Atlas Insight

Matcha white chocolate rides the wave of mood-boosting treats... Matcha white chocolate is gaining traction as a wellness-oriented indulgence. Balancing sweetness with Matcha's bittersweet profile, it's...

2025-07-24

Longevity



Next Atlas Insight

NAD+, a vital molecule for energy and repair, is gaining attention... NAD+, an essential molecule for energy and repair, is attracting attention in the anti-aging market. Primarily popular among Millennial...

2025-06-17

Gut Health



Next Atlas Insight

Fiber-rich foods are regaining favor as gut health becomes th... Fiber-rich foods are gaining popularity as a key component to holistic health. Examples include grain-free granola, flaxseed crackers, and root vegetables

2025-06-12

Unusual cooking



Next Atlas Insight

Roasted strawberries turn familiar sweetness into a deep... Roasting strawberries has emerged as a culinary trend, enticing palates with a sophisticated spin on familiar sweetness. From exciting breakfast...

2025-08-14

Fairytale look



Next Atlas Insight

Princess cake is gaining cult status among Gen Z for its... The princess cake, with its fairy-tale charm, is increasingly captivating Gen Z. This Swedish confection, featuring layers of sponge, raspberry jam...

2025-07-03

Flavor combos



Next Atlas Insight

Mango matcha rises as a flavor that blends tropical sweetness... Mango matcha, a combination of tropical sweetness with earthy sophistication, is gaining popularity. Its fans enjoy it in various forms like...

2025-06-19

Swavoury

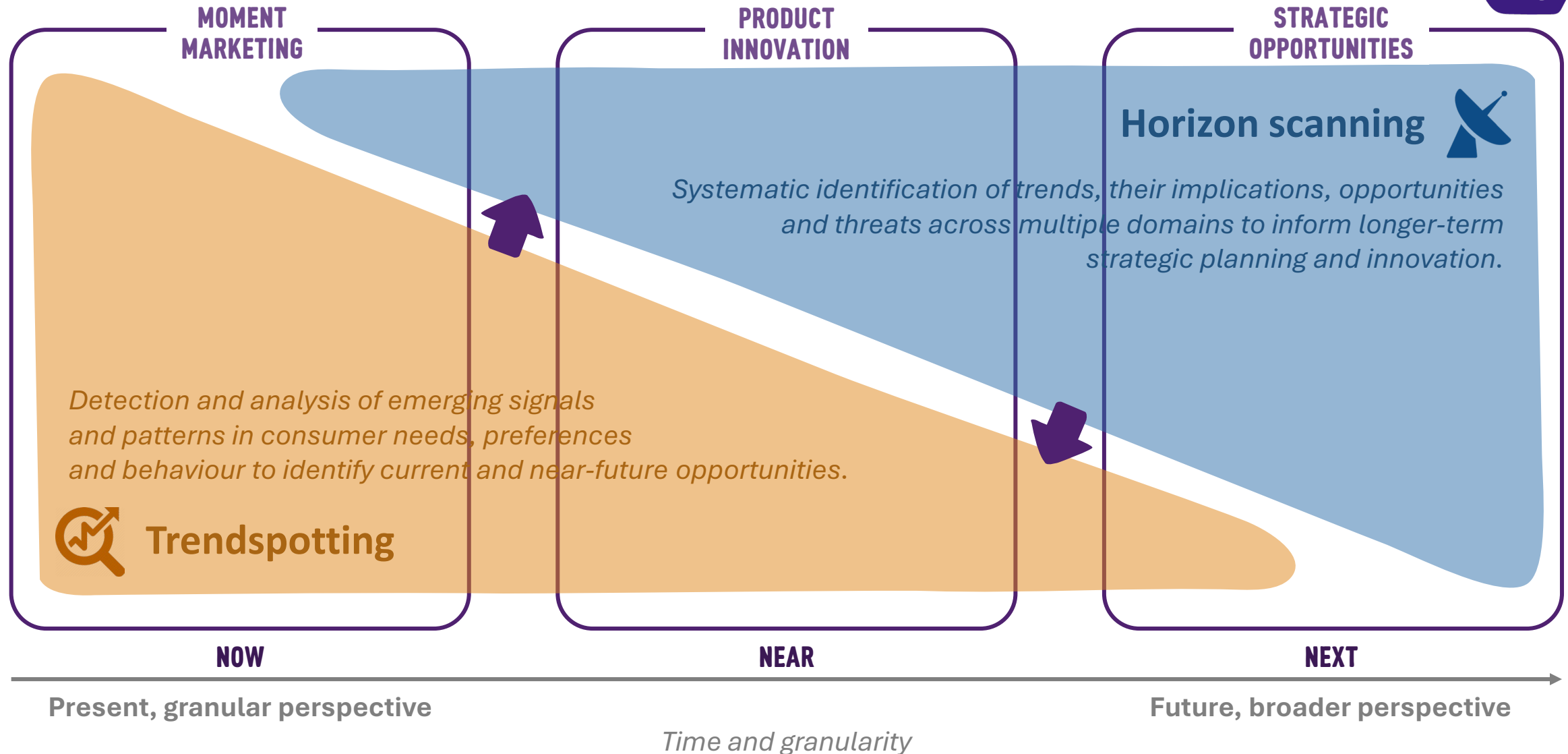


Next Atlas Insight

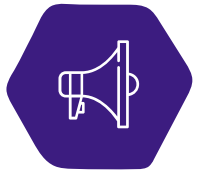
The flavor combo of chocolate sea salt taps into growing... Chocolate sea salt flavor is resonating with consumers seeking gourmet takes on familiar treats. Manifesting in various forms such as rice cakes...

2025-07-03

TREND MAPPING TECHNIQUES: TRENDSPOTTING & HORIZON SCANNING



EXTERNAL COMMUNICATION: SHARING WHAT WE SEE



State of Snacking: Future Trends is our perspective on the future of snacking as a manifestation of MDLZ thought leadership and expertise. It became one of the most visited and downloaded resources on our corporate website.

<https://www.mondelezinternational.com/stateofsnacking/snacking-trend-radar/>



INTRODUCTION | SHIFTING DEMOGRAPHIC LANDSCAPE | INCREASINGLY FLUID LIFESTYLES | PEOPLE AND PLANET IMPACT IMPERATIVE | HEALTH AND WELL-BEING UBIQUITY | RESURGENCE OF EXPERIENCE ECONOMY

Second lifers | Middle class expansion | Evolving household composition | Global mobility and multiculturalism | Young consumer cohorts

SECOND LIFERS

The global population is aging. By 2050, the number of people above 60 will double to 2.1 billion, representing 29% of the world's population. Today, mature consumers are healthier and living longer on average than previous generations. "New risks that mark retirement age mark the beginning of a new active life stage often referred to as "Second Life".

Second Lifers today represent the world's most affluent age cohort. Their contribution to global consumption is massive: mature consumers are projected to spend close to \$5 trillion USD by 2050. They are also more physically active, socially engaged and increasingly digitally savvy: 51% of 60+ consumers make online purchases at least once a month, and 42% played online video games at least once.

68% of consumers over age 58 are snacking to pamper, spoil or reward themselves.

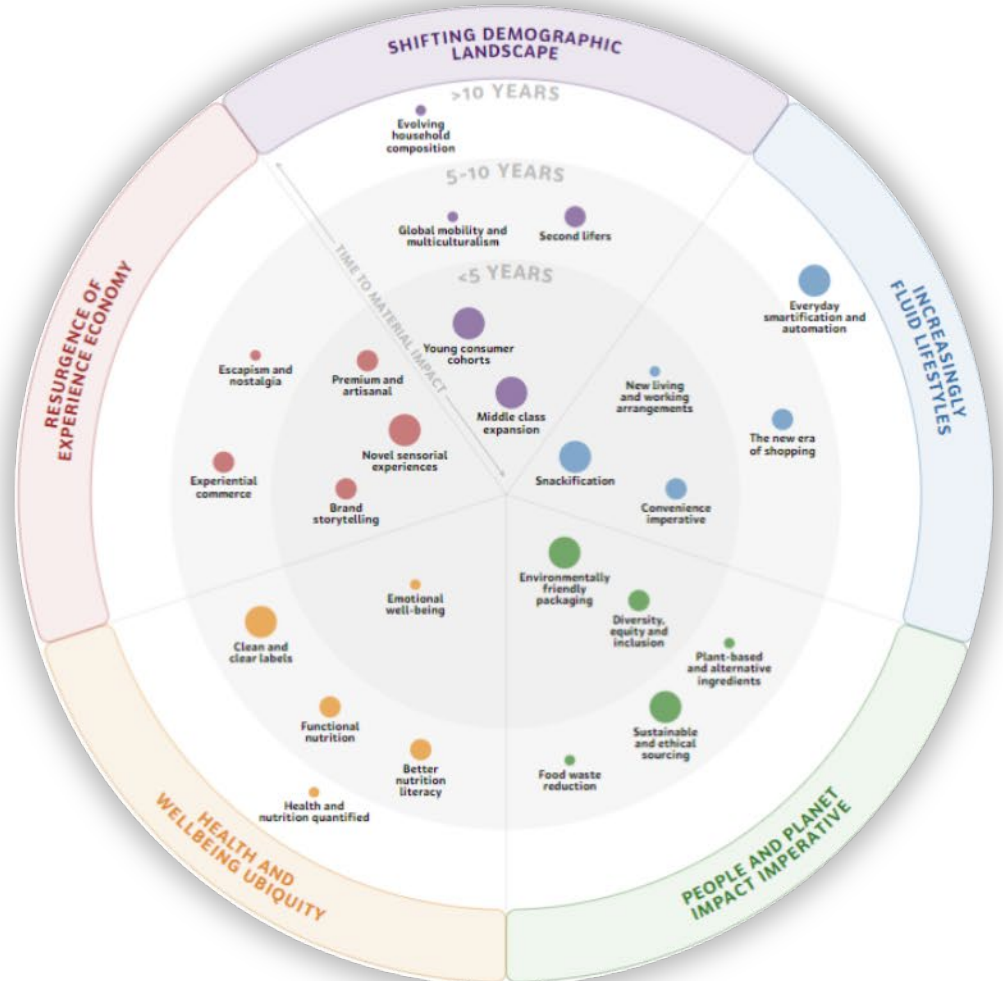
This age group wants food that supports healthy aging and an active lifestyle, putting the spotlight on balanced nutrition options. Moreover, one-third of mature consumers consider getting their recommended daily allowance of vitamins and minerals important, contributing to the popularity of functional nutrition. Even though they are a stable group with strong purchasing power, the representation of Second Lifers in advertising is still relatively low, with only 4% of people over 60 cast in ads globally.

Indulgence remains an important consideration for snacking choices, with 68% of consumers over age 58 snacking to pamper, spoil or reward themselves.

GLIMPS INTO THE FUTURE
As risks of Second Lifers grow globally, there will be more food and snacking products catering to their needs and preferences, such as balanced nutrition critical for an active lifestyle and functional ingredients supporting healthy aging. The face of advertising will gradually age, especially in countries with a significant mature population.

38% of recreational video subscription worldwide have shared information related to the media in their social media posts at least once in 2023.

MONDELEZ INTERNATIONAL STATE OF SNACKING FUTURE TRENDS



IDENTIFICATION - WHAT DOES THIS INNOVATION CHANGE?

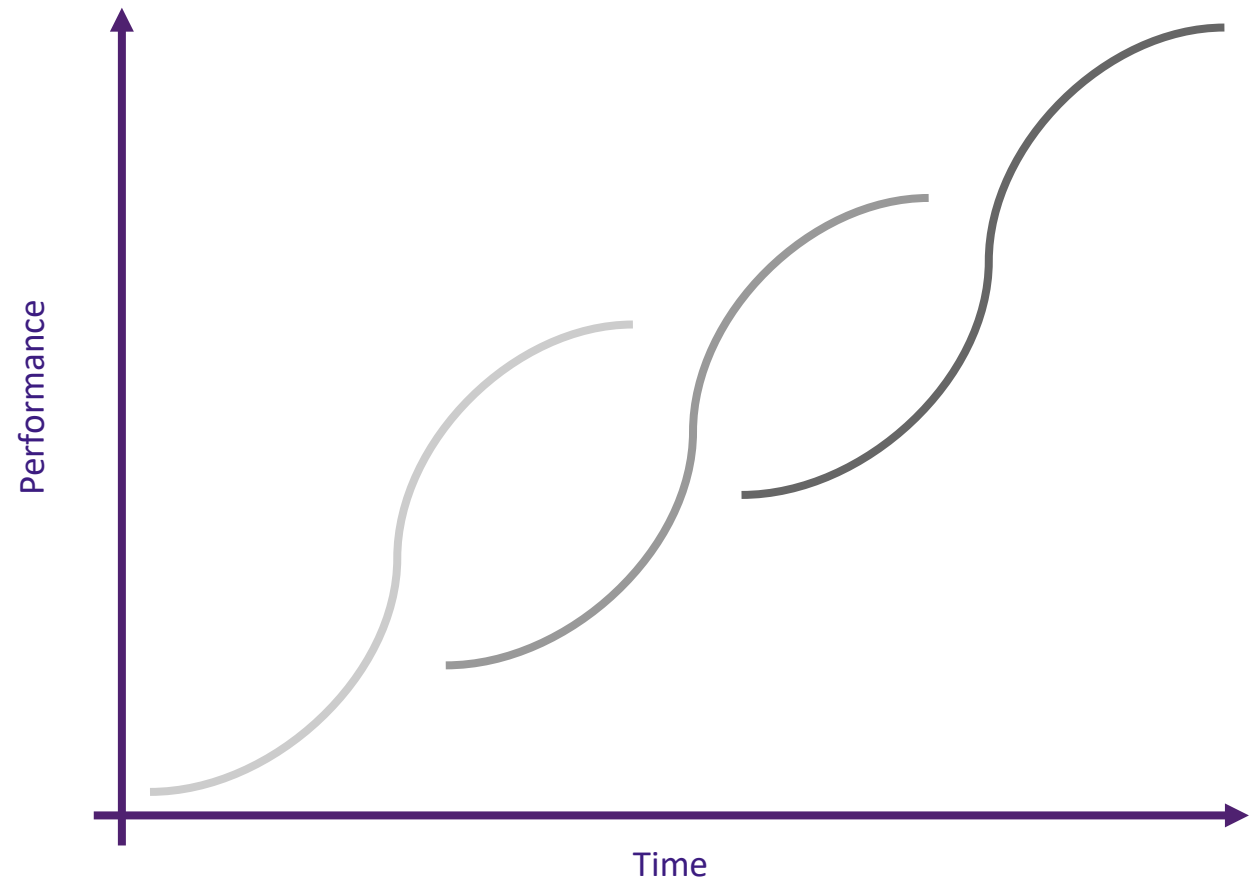
Consumer facing

- New Consumer Demand
- New Customer Demand
- Affordability
- Brand Values
- Sustainability
- ...

Non-Consumer facing

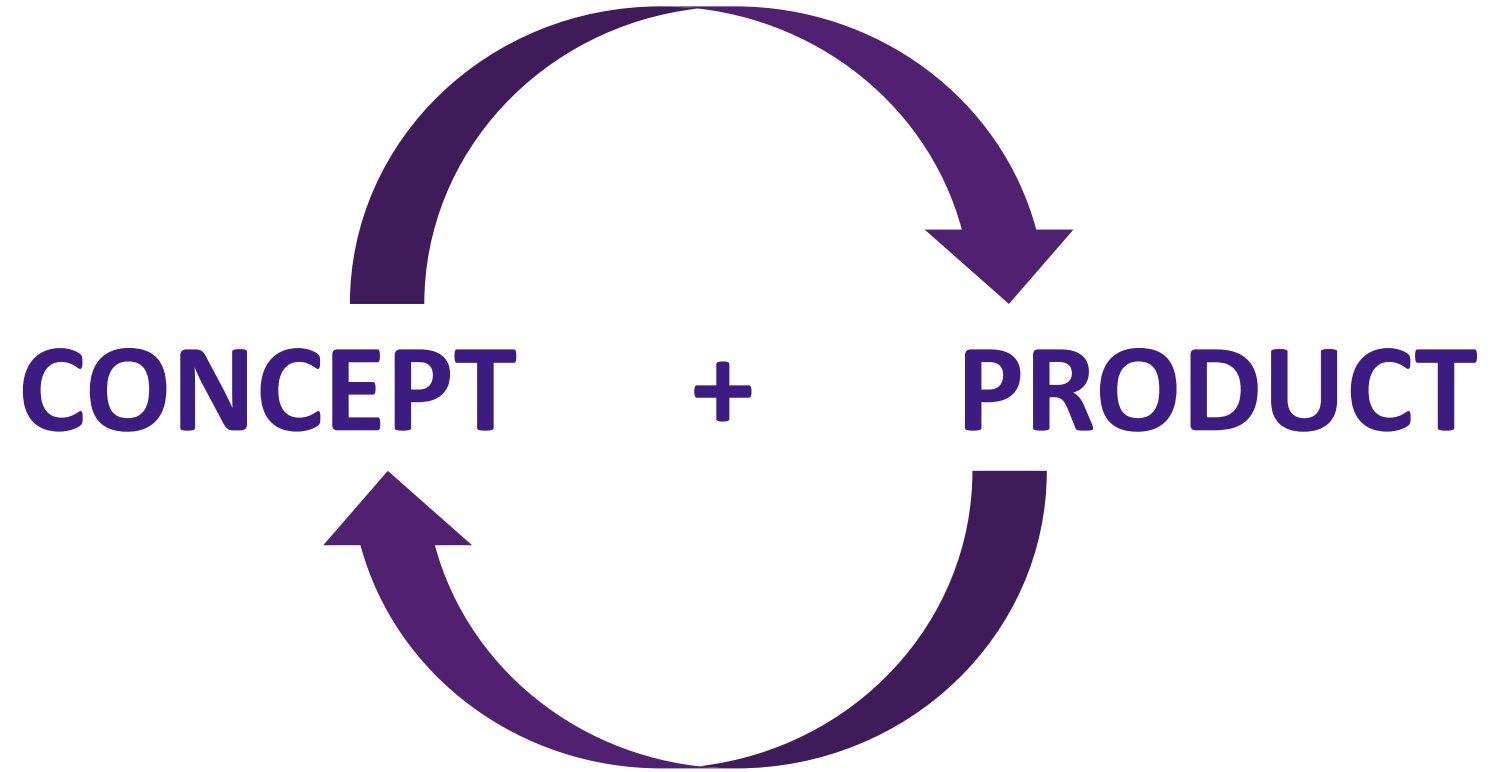
- Food Safety
- Supply Resilience / Disruption
- Regulation
- Competitiveness
- Sustainability
- ...

Innovation enabled evolution



[after Christensen 1992]

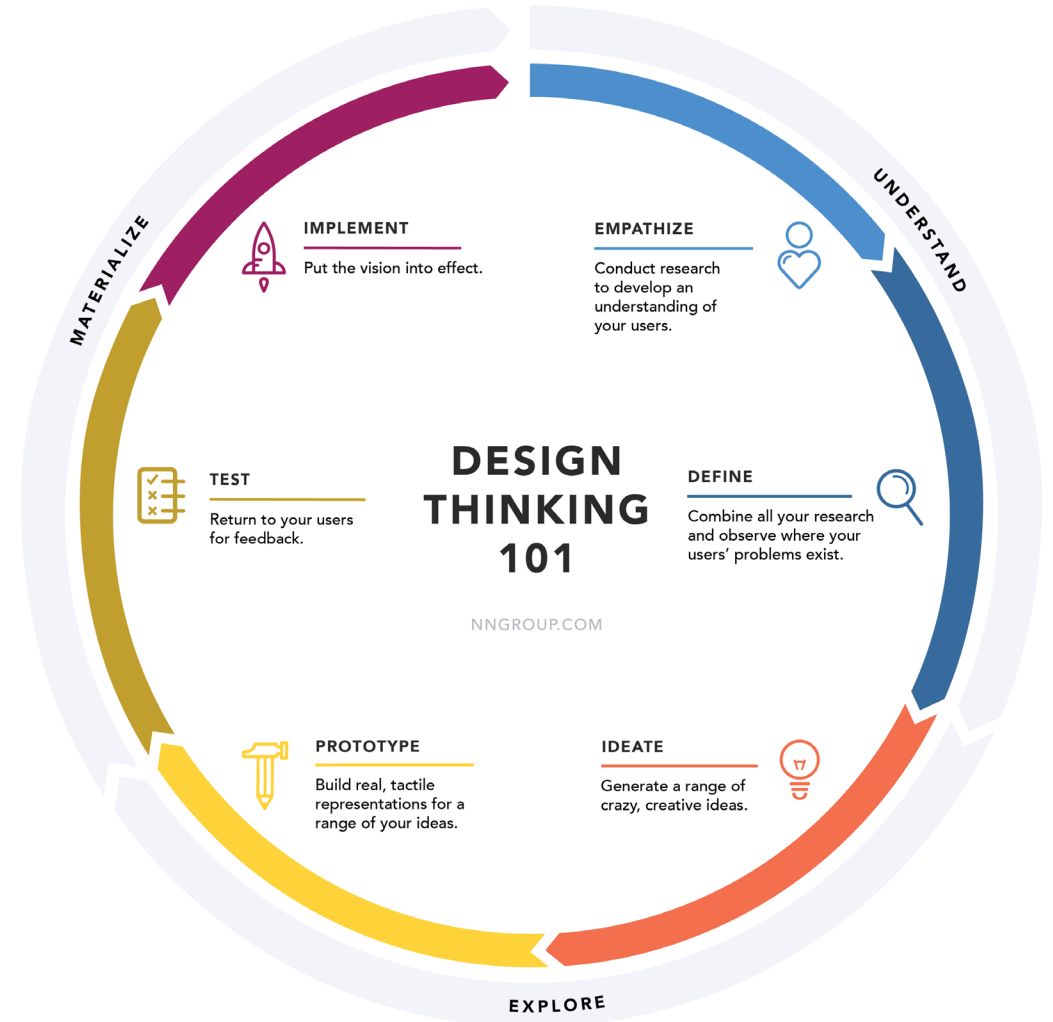
IT'S AS SIMPLE AS: 1, 2, 3...



IDENTIFICATION - EXPLORATION - CONFIRMATION - VALIDATION

Design Led Thinking:

- Exploring & building - ideas into possibilities
- Rapid prototyping
- Co-creating / sequential recycling



IDENTIFICATION - EXPLORATION - CONFIRMATION - VALIDATION

- **Our world is constantly changing**
- **Consumers always have a choice**
- **Competitors are always looking for an opportunity**



Standing still is not an option, innovation or irrelevance...