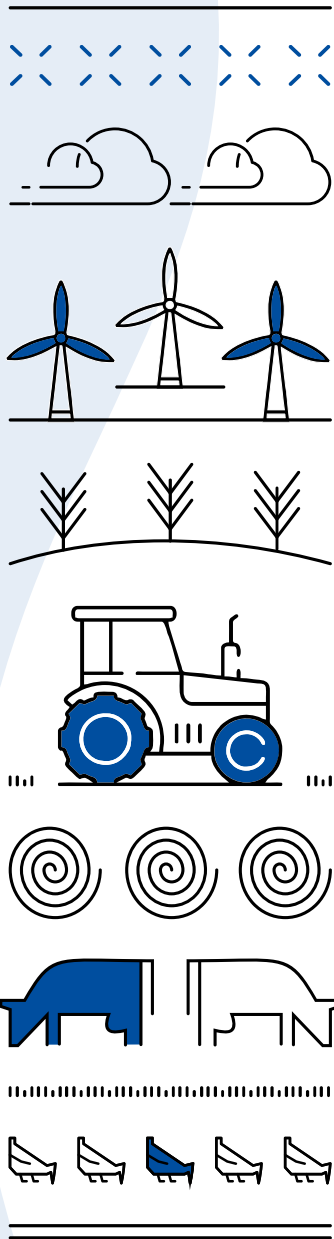


FORESIGHT

*Exploring
the Future of Food*



Carrefour



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Foreword

The thing about Food transition is that it is more interesting and humanly rewarding that it actually sounds, but more complex than it lets to be seen just by looking at the simple wording.



Nutrition holds its' well-deserved place as a generator of well-being personal standpoints, controversy, educational workshops for burnt out workers people, side-gigs for passionate amateur chefs, valuable content for overly confident influencers, it is inevitably situated at the very core of our lifestyle, it has its' branches stretched throughout way too many key areas to not be one of the staples of food transition, and what it strives for mostly has to do with **Improving** the approach on mindful eating, how we perceive food, how do we make the passage from "what's for lunch today?" to "WHAT is lunch for me today?" Meaning, what is the intended outcome from my choice of meal today - do I need fuel for working harder, do I wish to satisfy a certain crave, or do I plan to keep it frugal, since yesterday was a day accompanied by indulgences?

Consumers have diverse tendencies and preferences, but **Healthy** is a factor that should be met in all choices. More so than ever, clients are either already aware of the origin of ingredients, as well as the impact of production and distribution, or they have the necessary information sources at their disposal, they just need a view shifting induction, and this is where the food transition projects step in.

Accessible Organic for all, even if it may sound pretentious, is another goal for the food transition process; to find organic products more simply, in all categories (from fresh to frozen or dried products, beverages, cosmetics or products for the house), at affordable prices it is one of the food transition commitments. In the Romanian market even if the positive evolution of bio in the last year is obvious, we are still at a small percentage in rapport with other European countries and in rapport with the benefits of organic food and non-food products.



Climate is also a dramatically impacted sector of our century, we seem to not have it totally figured out quite yet, but! improvements are being made with specific projects, measures taken in order to integrate durable climate protection conditions, collective projects are being unfolded and have a louder voice on media channels. The main worrying aspects here are **reducing CO2 direct emissions, following a trajectory of 1.5°C, carbon footprint reduction, and less CO2 indirect emissions...**

Packaging needs our equal attention and it is strategically incorporated into the food transition philosophy as one of its four righteous pillars, a few goals here are a substantial reduction of package usage until end of 2025, new innovative and durable solutions for reusable packaging, absolute guarantee of recycling, more bulk products to place strategically in stores – not just seasonal products or special categories! - convincing alternatives for **single-use packaging** and any other action that can lead to a **fully rationalized approach in the whole package management chain.**

This approach is undoubtedly a challenge engaging us in front of the customers, it encourages us to innovate in the service of healthy eating and complete a transition towards a new economic model for food. But it is also what we can all do today for ourselves and for the future generations.

J Munch
Julien MUNCH
CEO Carrefour Romania



A Changing World

Change is an inherent part of our lives, constantly transforming the world around us. From individual transitions to broader shifts in seasons or the impact of natural phenomena, change permeates every aspect of our existence, including the evolution of food.

As we contemplate the future, we are intrigued by how food can change and in what ways. Looking back, we see the incredible variety of dietary choices that have emerged, from the rise of veganism, raw-veganism, and vegetarianism to the growing demand for healthier diets. Stores now feature specially arranged corners brimming with vegan and organic products, and restaurants proudly serve plant-based burgers. However, change is not just driven by individuals; nature also plays a role. Climate change, for instance, threatens the existence of certain plant species and challenges our ability to sustainably feed the global population. In response, countless efforts are underway to find suitable substitutes.

It becomes evident that change has a multi-level impact, even on aspects we may not have initially considered. Food is one such aspect, and there are compelling reasons to believe that it will undergo significant transformations in the future. Market demands, climate conditions, geography, and demographics will all shape its evolution.





AI generated image – Midjourney prompt: *illustration future of food transitions*



Amidst this backdrop of change, we must recognize that it is a collective responsibility. **Climate change cannot be reversed by the actions of a single person recycling or enjoying a lab-grown burger for lunch. We all have a role to play.** Each one of us holds the power to make a positive impact and contribute to a better world. Why? Because everyone eats.

This study serves as a catalyst for discussion, offering a broad perspective on the future of food and the anticipated food transition. Through its pages, we will present and analyze the factors that point toward the evolutionary path of food products, as well as the potential effects that may arise from these changes. **Ultimately, we extend the challenge to you, empowering you to become creators of the future!**

Together, let us embrace change, envision a sustainable and nourishing food system, and embark on a journey of empowerment. Because when we unite, when we collaborate, we unlock the collective power to shape a brighter and more resilient future for all. Let's create the change we wish to see in the world through the choices we make, the conversations we have, and the actions we take. **The future of food starts with us!**



Why Looking *into* the Future

Change is an inevitable force shaping our world, and navigating it successfully is essential for our collective well-being. As we contemplate the future of food, we find ourselves asking critical questions: How will our food systems evolve? Can we proactively address emerging challenges and seize opportunities?

This is where futures thinking and foresight come into play. By adopting a mindset that embraces the possibilities of tomorrow, we empower ourselves to anticipate change and prepare for its impact. Foresight, a discipline honed through years of experience, equips us with the tools and methodologies needed to explore potential futures, navigate uncertainties, and make informed decisions. Originally developed for military planning, foresight has evolved into a valuable resource for organizations seeking to understand the complex forces that shape their industries and the world around them.

In our research, we have employed futures thinking and foresight methodologies to scan the horizon, uncover relevant trends, and identify the signals of change that will shape the future of food systems. Our aim is to shed light on the transformative potential of these changes and help stakeholders navigate the challenges and opportunities that lie ahead.

“No more prizes for predicting the future, but rather for future-preparedness”

Diana STAFIE
Founder Future Station



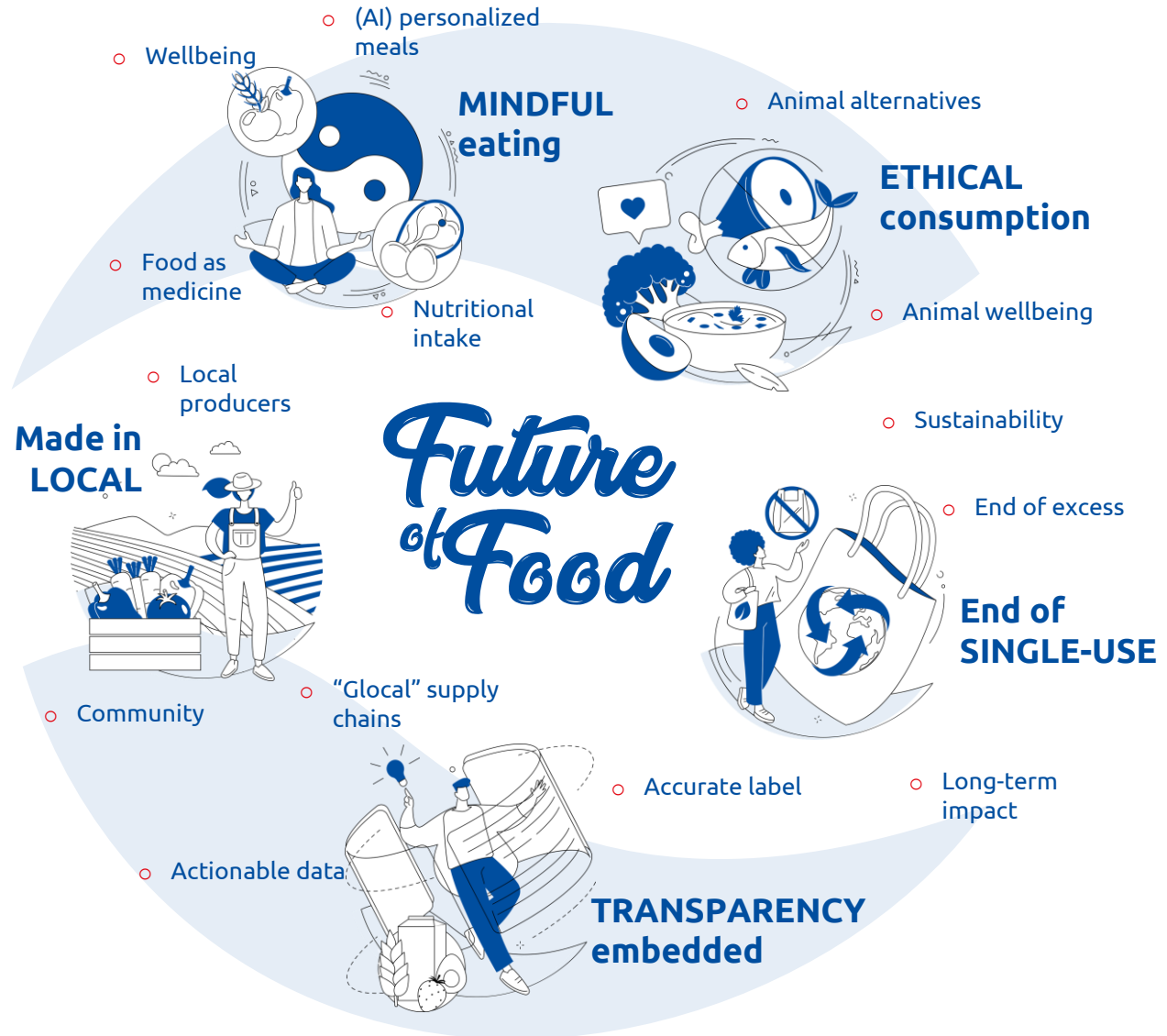
Trends and innovations

SHAPING THE FOOD TRANSITION

Trends serve as guiding lights, illuminating the direction in which our world could be heading. They provide us with invaluable insights, helping us navigate the complexities of our surroundings and uncover opportunities for growth. Like an outline that guides an artist's masterpiece, trends form a framework that aids companies in strategic planning and shapes their actions.

In this report, we turn our attention to 5 transformative trends that are set to shape the future of food systems and drive transition. Through extensive research, we delve deep into each trend, unravelling its intricacies and exploring its profound impact. But we don't stop at theory. Concrete examples of innovative solutions and initiatives bring these trends to life, illustrating their practical manifestation and inspiring action.

Through an exploration of these five trends, we aim to empower individuals and organizations to seize the opportunities that lie ahead and chart a course toward a sustainable and thriving future. The canvas is set, and it's up to us to paint a masterpiece of change and progress.





TREND

Mindful Eating

People are increasingly mindful of their mental and physical health, recognizing the significance of a holistic approach to overall wellbeing (particularly in response to the impact of the pandemic).

In the pursuit of wellbeing, nutrition plays a pivotal role, providing not just sustenance but also energy and happiness. Foods rich in essential vitamins and minerals contribute to the optimal functioning of our bodies, akin to a form of alternative medicine. As a result, consumers have become more conscious of their food choices, scrutinizing labels and seeking to avoid ingredients on their personal "must avoid" lists.

Taking this even further, imagine a world where artificial intelligence (AI) steps in, revolutionizing our approach to nutrition. We could have AI-powered personalized meals tailored to individual preferences, dietary needs, and health objectives.

WHAT CONSUMERS SAY?

70% or seven in ten Gen Z respondents and two-thirds of Millennials (66%) say they want to become healthier .

Source: [globalscan.com](https://www.globalscan.com)

4 out of 10 Romanians consider that having a healthy and sustainable diet involves eating more fruits and vegetables

Source: [Statista](https://www.statista.com), "Public Opinion on Eating healthy" Romania

HOW IS THE MARKET REACTING?



⌘ AUTHORITIES

- The **EU is Working on a Harmonized Food Labelling System** that will include the nutritional, health and social components of food staff.
- **World Health Organization** also launched for public consultation a guideline on fiscal policies to promote healthy diets.
- **Nutrition.gov** is a USDA-sponsored website where are presented bunch of healthy recipes. Also on the website people will find the FoodKeeper app.
- **FoodKeeper app** helps people better understand how to store food and beverages in order to maintain their freshness and nutritional quality.
- **NHS Food Scanner app** helps consumers to find better food options. All they have to do is to scan the barcodes of the products while they are in store and the app will tell them how much sugar is in that product or other details related to ingredients. Following that, the app will then suggest a healthier version of the initially desired product.

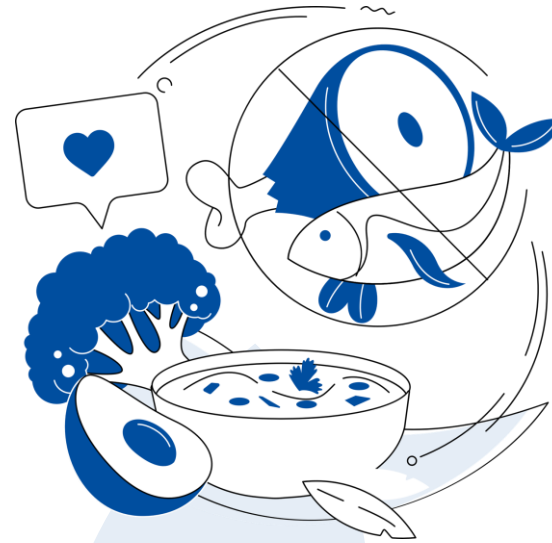


⌘ COMPANIES

- **Carrefour Romania and the InspirAction Association** start the educational program „Gust pentru Sănătate. Ora de obiceiuri sănătoase și mese delicioase” in 7 schools in 5 cities from Romania.
- **Hologram Sciences (backed by DSM)** is a start-up combining health diagnostics, digital coaching and personalized nutrition targeting in a holistic manner various health conditions for their customers.
- In 2017, **Danone founded together with the SAMAS Association, the program called „Sănătos de mic”**. The aim of this initiative is to prevent childhood obesity and to lay the foundation for good eating habits from childhood.
- **allplants** is a start up from UK which provides chef-to-customer service. Customers can choose from many tasty, plant-based meals through allplants online platform.



TREND *Ethical Consumption*



Within the trend of ethical consumption, the focus extends beyond sustainability to include the welfare of animals. Consumers are increasingly seeking products that align with their values of compassion and conscious choices. This trend encompasses a growing interest in animal alternative products that offer cruelty-free alternatives to traditional animal-based options.

Consumers are actively exploring dietary choices that reduce their carbon footprint and address the ethical treatment of animals. This shift in preferences has led to the rise of vegan, vegetarian, and other plant-based lifestyles. Animal alternative products, such as plant-based meat substitutes and dairy alternatives, have gained popularity as viable and ethical alternatives.

WHAT CONSUMERS SAY?

8 out of 10

respondents consider that they **have a sustainable behavior**

Source: [Wave, 2022 "Sustainability from theory to action"](#)

54%

consumers take sustainable packaging into consideration when selecting a product

Source: [fooddive.com](#)

Across Europe, a large majority of consumers say that **farm animal welfare is important**. A few examples:

75% in France

84% in Norway

73% in UK

Source: [welfarequality.net](#)

HOW IS THE MARKET REACTING?

COMPANIES



- **Magazinul Zero Waste** is a grocery store in Bucharest where products are sold in bulk and customers can bring their own packaging for shopping. Similar shops are now open also in Timișoara, Oradea, Suceava
- **Kellogg** is offering a Carbon emission assessment to 20 farmers in France & Belgium. In the future, based on this assessment, farmers may get support to help decrease GHG/Carbon footprint, while improving their productivity.

AUTHORITIES



- The **German government is discussing an 'animal welfare fund'** which would be fed by an 'earmarked animal welfare levy' to support farmers to transition to better animal welfare
- The **Flemish local administration** is supporting a public-private Protelnn Club, a research hub for microbial protein with the view to ensure replacement for animal protein

- **SavorEat** is an Israeli start-up using a combination of a revolutionary chef robot, proprietary 3D printing technology, and plant-based ingredients to create meat-like textures
- **Waitrose** supermarket chain pioneered the use of a first-of-its-kind app that measures the emotional wellbeing of livestock



End TREND of Single-Use



91% of plastic waste ends up in landfills instead of being recycled every year and this material takes more than 400 years to degrade.

Increasingly, individuals are consciously adopting behaviors that reduce waste and minimize their ecological footprint. From reusing plastic bags to bringing reusable cups and opting for refillable options, consumers are actively embracing a more sustainable lifestyle.

It is clear that the myopic mindset of "grab-go-throw" is no longer sustainable. In response, millions of consumers are demanding a paradigm shift. They are challenging brands to reimagine and eliminate single-use and ephemeral products entirely. The focus is shifting from short-term convenience to long-term impact.

WHAT CONSUMERS SAY?

73%

of Gen Z consumers are keen to be able to reuse packaging

Source: packagingeurope.com

64%

of UK consumers have limited their consumption of single-use plastic.

Source: deloitte.com



HOW IS THE MARKET REACTING?



COMPANIES

- **Carrefour Romania** relaunches „Plata cu PET” which means that customers can receive a fruit or vegetable grown in Romania for each PET, aluminium or glass cans collected.
- **Ecovative** provides mushroom packaging. This is a sustainable one created from mycelium (the material structure of fungi) and which can be recycled directly in and by nature.
- **DS Smith** launched Circular Design Metrics, a new breakthrough tool that makes it possible to see and compare the performance of a packaging design across a range of indicators, such as recyclability, renewable content, supply chain optimization.
- **Lăptăria cu Caimac** is planning an investment in a packaging recovery and reuse system. The machines will be located in supermarkets and neighbourhoods and for each recycled bottle consumers will receive between 32 and 35 BANI.
- **Loop** is a global reuse platform who collects used packaging from consumers and retailers and returning hygienically cleaned packaging to manufacturers for refill. Among its many initiatives, Loop partnered with [Burger King UK](#) (pilot program) and introduced [reusable packaging](#) in the restaurant for selected menu items.



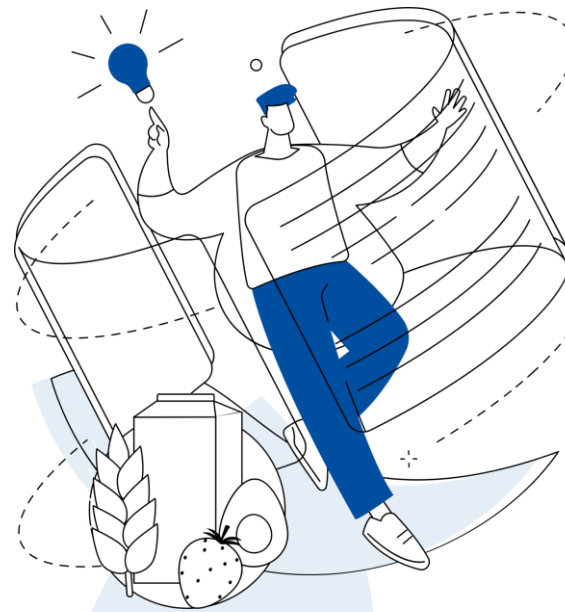
AUTHORITIES

- **EU Commission** proposes very ambitious new rules on packaging waste, including:
 - [companies will have to offer a certain % of their products to consumers in reusable/refillable packaging](#) (takeaway drinks/meals or e-commerce deliveries, etc.)
 - [ban for certain forms of packaging](#) (e.g. single-use packaging for food and beverages when consumed inside restaurants, single-use packaging for fruits and vegetables, etc.)
- [France has a ban on plastic packaging since 2022 for certain fresh vegetables and fruits](#) and has a target to phase-out single-use plastic by 2040. A ban on single-use plastic in large fast-food chains is also in place since the beginning of this year



TREND

Transparency Embedded



In today's world, people are increasingly determined to reshape their eating habits and establish a foundation for a healthier lifestyle. However, to make informed decisions, they require a deeper understanding of the products they consume. They seek knowledge about the ingredients, manufacturing processes, and origins of their desired items. This quest for transparency has become a key factor influencing purchasing decisions.

In this era, merely labelling a product as "organic" or "bio" is no longer sufficient. Consumers demand tangible evidence and proof of these claims. They yearn for comprehensive access to information across all aspects of a product. They expect relevant, personalized, and valuable insights delivered seamlessly, wherever, whenever, and however they need them.

WHAT CONSUMERS SAY?

According to **Transparency in an Evolving Omnichannel World** report by FMI—the Food Industry Association and NielsenIQ

64% of shoppers say they would switch from a brand they usually buy to another brand that provides more in-depth product information, beyond nutrition facts.

Source: [nielseniq.com](https://www.nielseniq.com)

80% of shoppers, beyond nutrition facts, cited other transparency indicators of importance to include allergen information, certifications and claims, and values-based information such as animal welfare, fair trade, and labor practices.

Source: [nielseniq.com](https://www.nielseniq.com)

79% of respondents reported that when manufacturers and retailers share complete and easy-to-understand ingredient definitions, they are more likely to trust those companies.

Source: [supermarketnews.com](https://www.supermarketnews.com)



HOW IS THE MARKET REACTING?



COMPANIES

- **Carrefour**
organizes „Săptămânile Tranziției Alimentare” as part of the global Act For Food program. During the two weeks, consumers will discover healthier, sustainable food products at affordable prices, and last but not least, more transparent ones, in order to be able to lay the foundations of a healthy diet.
- **Aqua Carpatica - Testul purității.**
With this test consumers can find out the concentration of nitrates in the water they consume.
- **Coca Cola NA**
invites B2B customers to brainstorm new business ideas with them in the new created KOLab.
- **Crowdfarming**
is a European a platform that allows customers to adopt a tree and receive its harvest delivered at home at the end of the season. The farmer and its farm also featured

AUTHORITIES



- The **EU is now debating a Directive on Corporate Sustainability Due Diligence** - companies could be required to conduct human rights and environmental due diligence across the whole of their business and value chains



TREND

Made in Local

This trend has emerged as a result of people's desire to support the local economy and foster community connections by purchasing products from small-scale producers.

Consumers are increasingly drawn to the idea of sourcing goods from local (national) producers due to the benefits it offers. Local food chains not only contribute to the vitality of the community but also have a lower environmental footprint by reducing transportation emissions. Furthermore, as transparency triumphs, consumers are uncovering the hidden truths behind global hyper-production, leading them to seek more genuine and locally sourced alternatives.

By embracing the "glocal" approach, consumers contribute to a more interconnected future, where the best of both global and local perspectives might coexist harmoniously.

WHAT CONSUMERS SAY?

57%

of Romanians believe that local products are superior to those from the supermarket.

Source: izidata.ro

78%

of Romanians declare "I prefer to buy products from my country rather than products from abroad". This makes Romania to be among the top countries where most consumers claim preferring national products.

Source: [Ipsos Global Trends 2023](https://www.ipsos.com/en/global-trends)



HOW IS THE MARKET REACTING?



⌘ AUTHORITIES

- **With its Farm to Fork Strategy**, the EU is aiming to cut the distance between the two favoring short distribution/local routes
- **"Fresh and local" platform (France)** was launched by Ministry of Agriculture and Food, in partnership with the Chambers of Agriculture, on January 12 (2021) to help potential buyers identify local producers from the partner network and their points of sale near the house
- **Singapore Food Agency** support local produce by putting SG Fresh Produce (SGFP) logo on packaging and selected marketing collaterals. Thus, consumers can easily identify locally-made products



⌘ COMPANIES

- **"Lădita cu verdeturi"** is a seasonal product through which Carrefour brings the consumer closer to farmers and at the same time shows its support for local producers
- **"Piata la drum"** is a campaign carried out by Mastercard and Waze through which registered sellers who sell products in front of their house or garden can be located on the online map by potential buyers
- **VerdeFood** is addressing Horeca, helping this industry to connect urban consumers with local and healthy food products



STUDY CASE

Our Garden Program

Carrefour Cooperatives

25-30% of the vegetables and fruits consumed are currently imported in Romania.

The pandemic has led to a growing trend of buying local products, and retailers are putting more effort into offering locally sourced items. When it comes to fruits and vegetables, 92% of Romanians who buy from local producers prefer them because of their authentic and traditional taste.

To bring about positive change, we believe that a comprehensive ecosystem involving manufacturers, authorities, chambers of commerce, NGOs, etc is needed. In that sense, **Carrefour was the first and only retailer to co-found back in 2017 a cooperative together with 4 farmer families from Vărăști village.**

This meant not only buying the products, but helping the family businesses with logistics, agricultural counseling, anti-waste and legal support, and overall giving them more time, as they didn't have to travel to sell their goods. Through this cooperative model, Carrefour started creating its own supply of local products, and, currently, the program reached:

627 Hectares of crops **240** Families & producers **10** Cooperatives

Within five years, OUR GARDEN saw the addition of 54 more families and 180 hectares of crops in 2022, bringing the total to 148 families. The program has received requests from farmers in five other regions of Romania for specific crops. **Carrefour's ability to nationally cover 100% of its fresh supply during the full season** with ultra-local Romanian products provides a significant advantage in the competitive local products market.

The cooperatives' share in local products increased from 4.79% in 2019 (one cooperative) to 24.51% in 2022 (four cooperatives). The value of the cooperatives also saw a substantial increase of approximately 335% in 2021 compared to 2020, and around 35% in 2022 compared to 2021.

During the high season of June to August 2022, cooperative sales revenue showed significant growth compared to the previous year:

+16.9% tomatoes **+58.6%** potatoes **+8.9%** cabbages
+46% aubergines **+89.1%** watermelon

Carrefour's image as the preferred choice for local products continued to strengthen (+3pp), and they secured leadership in the "Relationship with farming sector" indicator, surpassing their main competitor by 17pp.

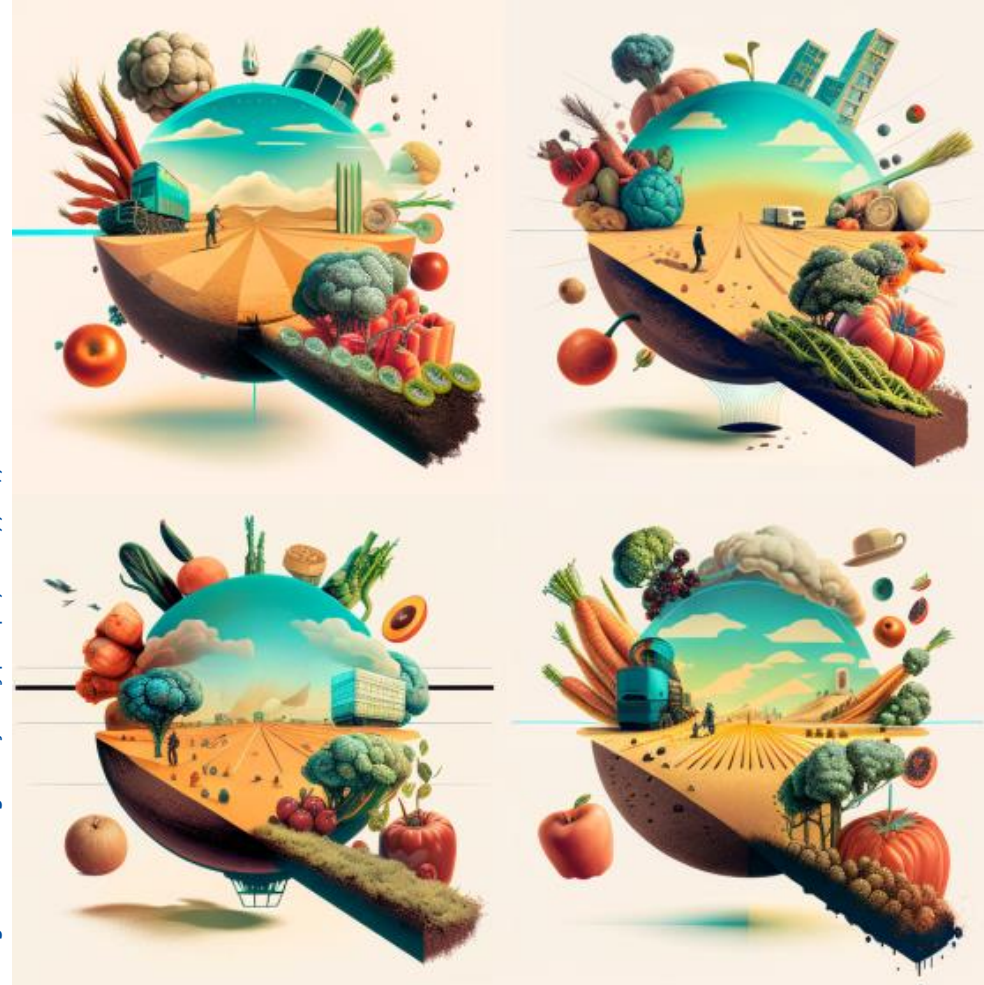
ENVISIONING *Possible Futures* OF FOOD TRANSITION

As we delve into the future of food, it's natural to ponder the potential outcomes of the trends and innovations we've discussed. What will remain constant, and what might change?

These questions serve as a catalyst for our exploration of possible scenarios.

On the following page, we present hypothetical future scenarios narratives, not as definitive predictions, but as food for thought. It is crucial to shift our focus from mere probabilities to exploring a realm of possibilities. By considering multiple possibilities and utilizing our available resources, we can better prepare ourselves to navigate uncertainties and seize opportunities.

These future hypotheses prompt conversations about how businesses and individuals can proactively prepare for what lies ahead. They could foster a proactive mindset and encourage strategic thinking in the face of uncertainty.





○ **IMAGINE A FUTURE** where walls of factories will be transparent so that anyone can see how food is produced

○ **IMAGINE A FUTURE** where all products have a carbon footprint on the front label

○ **IMAGINE A FUTURE** where customers will only purchase products whose ingredients are 100% natural

○ **IMAGINE A FUTURE** where people will only eat what is designed by AI specifically for them based on health and wellbeing requirements.

○ **IMAGINE A FUTURE** where consumers will only want to buy beverages from refill machines in stores in order to reduce the consumption of plastic

○ **IMAGINE A FUTURE** where all our food is 3D-printed

○ **IMAGINE A FUTURE** where consumers will only buy food from small local producers/farms

○ **IMAGINE A FUTURE** in which products found in plastic packaging will no longer be accepted by stores

○ **IMAGINE A FUTURE** where everyone is a social omnivore

○ **IMAGINE A FUTURE** where consumers will stop eating products of animal origin because they want to protect animals



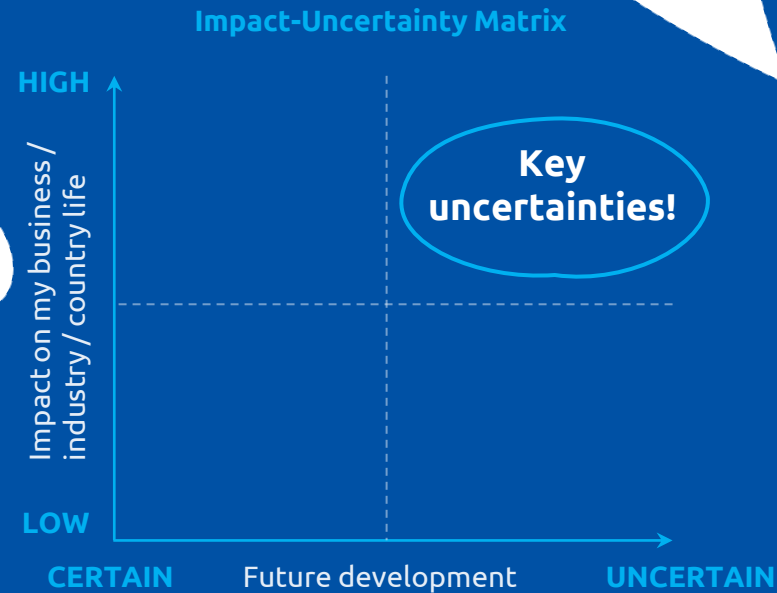
**Plan for the future
because that's where
we are going to spend
the rest of our life.”**

Mark TWAIN



Action-Driven Futures

Transforming trends into opportunities



To act upon the trends presented and enhance your future preparedness, consider implementing the following practical steps:

01 PRIORITIZE

Consider the 5 trends and other pertinent information from "Food for Thought" or any additional sources of trends / drivers of change you have explored. And use the Impact-Uncertainty matrix below as a tool to assess the potential impact of each trend on your organization and evaluate the level of uncertainty surrounding them. It helps if you have in mind a clear time horizon for your analysis (e.g. 2025)

02 FOCUS ON THE UPPER RIGHT QUADRANT

Identify the top two items that fall within the upper right quadrant of the Impact-Uncertainty matrix. These listings have both significant impact potential and higher uncertainty, making them important focal points for your strategic considerations.

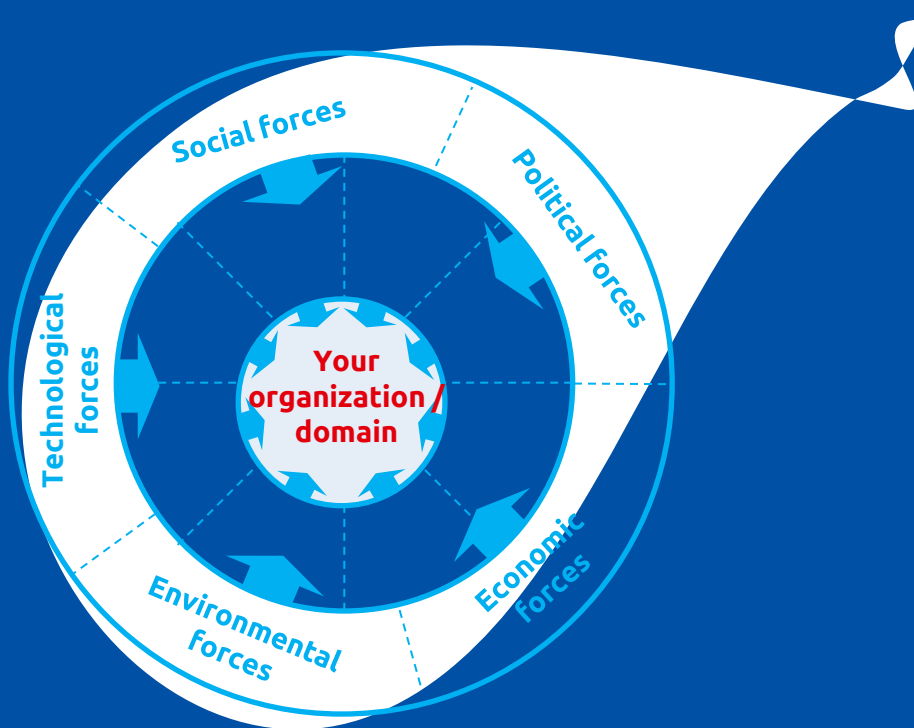
03 EXPLORE EXTREMES FOR FUTURE DEVELOPMENT

For each of the 2 selected item, consider two extreme poles that represent contrasting future scenarios. This exercise helps to define the potential range of outcomes and provides a broader perspective on the potential evolution of each trend.



04 DESCRIBE EMERGING CONTEXTS

Describe the context that would emerge under each extreme pole scenario, highlighting the key aspects that could evolve in different ways. This analysis will offer insights into potential future landscapes and the implications for your organization.



05 ENGAGE IN PARTICIPATORY DISCUSSIONS

Engage others in participatory discussions to enrich your understanding of each context. Seek diverse perspectives to foster a more comprehensive and robust exploration of the potential future trajectories. For each context, you could address the following questions to gain deeper insights and identify actionable strategies:

A. What factors have the potential to (dis-)accelerate this future scenario? Consider technological advancements, regulatory changes, societal shifts, and other relevant factors that could impact the future landscape.

B. What new needs could arise in this situation? Anticipate the evolving demands and requirements that may arise within the given context. Explore how customer preferences, market dynamics, and societal expectations might shift.

C. What steps should your organization, or you as a professional, take to remain relevant and thrive in such a future? Assess the skills, capabilities, and resources needed to navigate the future effectively. Identify areas for innovation, strategic partnerships, talent development, and operational adjustments that can help your organization adapt and thrive.

By addressing these steps, you can gain deeper insights, uncover emerging opportunities, and develop actionable strategies to position yourself or your organization for success in an ever-changing future. Embrace the power of foresight and forward-thinking to drive innovation and remain adaptable in the face of uncertainty.



Acknowledgements

ABOUT THE AUTHOR

Future Station has conducted the analysis and writing of this report.

Future Station is a foresight consultancy company with expertise in strategic planning, trend scouting, scenario planning, and team training for future realities. Future Station serves clients across various industries, including retail, telecom, financial services, FMCG, energy, healthcare, as well as NGOs and public institutions.

As a team passionate about exploring future-related topics, Future Station is committed to joining you on your future endeavours and foresight projects.

Thank you for your interest! Good futures,

Diana Stafie

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**FUTURE
STATION**

Spot the early signs
of future change



Future trends: Food Transition 2023 // futurestation.ro

“the Future
**IS ALREADY HERE -
IT’S JUST NOT EVENLY
DISTRIBUTED!”**

William GIBSON