

# DELIVEROO SNACK TO THE FUTURE



FOOD.  
WE  
GET IT.







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# SNACK TO THE FUTURE



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# INTRODUCTION

# SNACK TO THE FUTURE

Welcome to the future of food delivery and enjoyment in 2040. This report paints a picture of what the future could look like, drawing on expertise and our own experiences to see how people will order and enjoy food that is better for them and the environment in 2040.

**In the first chapter, get ready for 'Me-ganism' — diets that are bespoke to a person's unique biological, physical and mental needs.**

With the development of Personal AIs (a life-long AI buddy), this technology could be adopted to predict people's unique nutritional needs and deliver personalised meal bundles that benefit their bodies and minds. Smart cooking, cleaning and food circulation devices (to recycle and reuse food) could redefine how people eat at home. Meanwhile, advances in 3D food printing could enable people to customise the shape, density, look and feel of food to suit their desires.

**Chapter two explores how more people will desire healthy, local, sustainable food,** and use powerful everyday technologies to understand where meals come from, how they are made, and what they should eat more or less of. New forms of nutrition could be available and affordable, and there could be a growing emphasis on mindful eating experiences as more people seek peace of mind. Meanwhile, the food and beauty industry will become more integrated than ever, promoting beauty and wellness from the inside out through the creation of edible beauty products.

**In the third chapter, we immerse ourselves in how augmented and virtual technologies might enhance where, how and what people eat and drink,** as people's digital and physical engagement with food fully converges. Virtual reality could get so sophisticated that people feel like they are sitting and eating with others from around the world. Virtual food tourism means people could be able to discover local restaurant specialties or fine-dine in whichever location they dream of. In addition, digital game-infused dining could create playful, immersive and meditative meal-time experiences.

**With many new and exciting opportunities to eat anywhere, anytime and with anyone, the future of meal delivery is most certainly going to be a transformative space.**

# BACKGROUND

This report was commissioned by Deliveroo and written by Avansere, alongside Deliveroo spokespeople.

Deliveroo is an award-winning delivery service founded in 2013 by William Shu and Greg Orlowski. Deliveroo works with approximately 179,000 best-loved restaurants and grocery partners, as well as around 150,000 riders to provide the best food delivery experience in the world. Deliveroo is headquartered in London, with offices around the globe. Deliveroo operates across 10 markets, including Belgium, France, Hong Kong, Italy, Ireland, Qatar, Singapore, United Arab Emirates, Kuwait and the United Kingdom.

The trends in this report were inferred using a combination of Deliveroo and Avansere's market intelligence, desk research and interviews with several industry experts:

- **Will Shu** is CEO and founder at Deliveroo
- **Carlo Mocci** is Chief Business Officer UK&I at Deliveroo
- **Devesh Mishra** is Chief Product and Technology Officer at Deliveroo
- **Georgie Barrat** is a Technology Journalist and TV Presenter, hosting Channel 5's consumer technology series, The Gadget Show
- **Sarah DaVanzo** is a quantitative Data-driven Futurist, experienced start-up entrepreneur, agency leader and F500 corporate executive
- **Tom Cheesewright** is an Applied Futurist, helping people and organisations to see, share and respond to a clearer vision of tomorrow
- **Kaave Pour** is the Co-founder of Space10, IKEA's independent research and design lab bringing new perspectives and solutions that create a better everyday life for the many people
- **Tracey Pollard** is Managing Director of Bruce Gillingham Pollard, and has over 20 year's experience of retail and restaurant agency, development consultancy and strategy



“

**I STARTED DELIVEROO IN 2013 WITH A MISSION TO CONNECT PEOPLE TO THE BEST QUALITY FOOD FROM LOCAL RESTAURANTS AND DELIVER IT DIRECTLY TO PEOPLE'S DOORS. IT HAS BEEN AN INCREDIBLE RIDE OVER THE PAST TEN YEARS AND I AM REALLY PROUD OF WHAT WE HAVE BUILT. AS WE LOOK TOWARDS THE NEXT DECADE AND BEYOND, DELIVEROO WILL CONTINUE TO CREATE EXCITING NEW INNOVATIONS IN FOOD DELIVERY, BUILD NEW AND BETTER CONSUMER EXPERIENCES AND TAKE DELIVEROO BEYOND FUNCTIONALITY AND CONVENIENCE TO REALLY CAPTURE THE PASSION AND EMOTION OF FOOD.”**

**Will Shu**  
Founder and CEO of Deliveroo



# THE RISE OF ME-GANISM

Image: Deliveroo's Snack to the Future report predicts that in 2040, people's diet could become fully bespoke thanks to AI technology, and food delivery services could synchronise meal options with someone's Personal AI and provide recommendations based on their physiological and psychological state at any given time.





## INSIDE THIS SECTION

In 2040, personalised diets and meals could transform why, how and what food people order and enjoy, with advances in AI accelerating the normalisation of hyper-personalised food services. Just as digital streaming platforms are harnessing predictive tools and data analytics to understand what customers want to watch, personalised meal delivery services could start to anticipate people's dietary needs.

### TOP TOPICS IN THIS SECTION

# 1

AI-powered meal delivery services could predict and automate people's orders

# 2

The rise of 'Me-ganism' - a new diet fully bespoke to individuals' personal biological, physical and mental needs

# 3

'Breathprints' could lead the way in privacy and personalisation, and provide deeper levels of insight into people's diet preferences and needs

# 4

Smart cooking, cleaning and food circulation devices (to recycle and reuse food) could redefine how we eat

# 5

The rise of domestic fractional farmers growing foods that suit the dietary needs of local communities





## THE RISE OF ME-GANISM

# NUTRITION KNOWHOW

“

**SMART GLASSES WILL COMBINE AUGMENTED REALITY TECHNOLOGY INTO A WEARABLE DEVICE SO THAT PEOPLE WOULD HAVE HANDS-FREE ACCESS TO THE INTERNET. BY ALLOWING THE USER TO ACCESS THE INTERNET USING VOICE CONTROL, THEY CAN VIEW AND LISTEN TO UP-TO-DATE INFORMATION ABOUT THE QUALITY, NUTRITIONAL VALUE AND SUSTAINABILITY CREDENTIALS OF THE FOOD IN FRONT OF THEM.”**

Tom Cheesewright  
Applied Futurist

**Meal delivery companies in 2040 could fully tailor meals to people's individual mental, physical, social and environmental needs and goals. The global personalised nutrition market is already valued at £14.5 billion in 2023 and is predicted to grow to £66 billion by 2040<sup>1</sup>.**

“In a category like ours where we provide a massive catalogue of meals, there's definitely a role that we can play in providing a discoverability function that fulfils this need,” says Mocci. “Say someone has 450 calories available for dinner, had a heavy lunch and has no space for more carbohydrates, we might recommend a new dish from a restaurant that will make their nutritional goals for the day.”

AI-powered grocery delivery services are already pioneering this predictive approach to grocery shopping by helping to automate customers' orders based on their preferences, which also helps to reduce household food waste. At Dutch Design Week 2022, design studio Nonhuman Nonsense's concept, AI-Bert's Fresh Place, envisages a supermarket run by AI that shapes customers' shopping baskets based on their life experiences while taking into account ecological and societal factors, providing 'personalised products for life on a damaged planet'.

Potentially, by 2040, people will live with certain technologies to combine information and receive personalised diet recommendations. “People will need a smart toilet (like the new Withings device that launched the CES show in 2023) to detect illnesses or poor dietary practise really early on; smart scales that do a much more robust full body analysis; and smart glasses,” says Cheesewright.

2023



## £14.5bn

**CURRENT VALUE OF THE PERSONALISED NUTRITION MARKET IN EUROPE**

2040



## £66bn

**PREDICTED VALUE OF THE PERSONALISED NUTRITION MARKET**

<sup>1</sup> Allied Market Research, 2023.





## THE RISE OF ME-GANISM

# THE ME-GAN DIET



**With people's diet becoming fully bespoke thanks to AI technology, 'Me-ganism' could become the big thing in dieting in 2040: a diet tailored to each individual's personal needs.**

"There's a huge opportunity to hyper-personalise the food people eat in the future. Most meal delivery apps today do not talk to people in a way that shows they know them enough, and so I think that is the opportunity we have with emerging technologies," says Mishra. "When thinking about the future of food delivery and enjoyment, we should focus on things which are not going to change. People will want meals tailored to what they can afford; tailored to their needs; and delivered whenever and wherever they want."

One concept that might appear in the future is 'Breathprints'. "Not only could people's breathprint be unique and uncopied compared to fingerprints, breath health diagnostics could provide deeper levels of insight into our diet preferences and needs," says DaVanzo. "It could be common in the future because people's devices could be enabled with BreathTech so that ordering could be all the more personalised to each person."

“

**THERE'S A HUGE OPPORTUNITY TO HYPER-PERSONALISE THE FOOD PEOPLE EAT IN THE FUTURE. MOST MEAL DELIVERY APPS TODAY DO NOT TALK TO PEOPLE IN A WAY THAT SHOWS THEY KNOW THEM ENOUGH, AND SO I THINK THAT IS THE OPPORTUNITY WE HAVE WITH EMERGING TECHNOLOGIES.”**

**Devesh Mishra**

Chief Product and Technology Officer at Deliveroo

People's breath is as unique as their fingerprint. Compounds in exhaled air produce a unique and stable molecular autograph or 'breathprint' that could be used to inform the early diagnosis of disease. Diagnosis happens when someone exhales onto a tool, like a mobile device, that has a variety of sensors using nanostructured semiconductor metal oxides. For example, these highly sensitive sensors could detect acetone, H<sub>2</sub>S, ammonia and toluene to evaluate diabetes, halitosis, kidney malfunction and lung cancer, respectively.

'Breathprints' could be used to ensure that what people order and eat has the optimal impact on their individual mood, energy, strength, weight and longevity.



## THE RISE OF ME-GANISM

# PERSONAL AI

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**A PERSONAL AI WILL KNOW HOW SOMEONE HAS SLEPT THE NIGHT BEFORE; IF THEIR HEART RATE HAS BEEN HIGH; IF THEY FEEL STRESSED; WHERE THEY ARE ON YOUR MONTHLY HORMONE CYCLE — ALL THESE THINGS WILL BUILD UP AN ACCURATE PICTURE OF THEM.”**

**Georgie Barrat**

Technology Journalist and TV Presenter

**In 2040, people are likely to want more information around how their body and mind might develop as they go through life, and importantly what they should do and eat to stay fit and healthy. The intermediary that will enable this will be people's Personal AI.**

“I can imagine a rite of passage for someone in 2040 could not be about getting their first phone or first car. It could be getting their first, and only, Personal AI, who could then become a lifelong partner. And it could be these Personal AIs that could advise and manage people's personalised diets,” says Cheesewright.

A personal AI would be a digital version of someone's mind that continuously learns from their personal knowledge and experiences and would have their unique personality and style. Someone's personal AI would be a digital library of their life's information. Everything would be indexed automatically and discoverable simply by chatting, and personal AIs would have a good grasp on many elements of someone's diet history and potential diet future.

“A personal AI will know how someone has slept the night before; if their heart rate has been high; if they feel stressed; where they are on your monthly hormone cycle — all these things will build up an accurate picture of them,” says Barrat.

Meal delivery services could increasingly offer AI 'Me'-nus that synchronise with someone's Personal AI to provide personalised meal recommendations based on their physiological and psychological state at any given time. Meanwhile, if a group of people eat out at a restaurant, a chef could tailor the taste, nutritional value or sustainability credentials of the ingredients in each dish to suit the needs of each person based on their personal AIs.



## THE RISE OF ME-GANISM

# WHOLE SYSTEM FOOD



**To truly deliver a personalised diet, Personal AIs would gather data about the way people work, learn, exercise or sleep, for instance, from the spaces they regularly use. The result could mean that someone's gym could serve them the right smoothie mix to enhance cardio levels; someone's school could serve them a personalised lunch to improve learning abilities; or someone's work canteen would optimise a lunch meal so that they don't have a slump in the afternoon.**

"Food delivery services might collaborate with fitness spaces," says Pollard. "For example, someone could do a spinning class, and data about their physical health could be analysed live. Then when they get home their smart kitchen appliances prepare them the perfect smoothie full of the right nutrients, proteins, carbs and hormone enhancing ingredients."

Meal delivery services with diagnostic tools built into them could also rise in popularity. This may create a more inclusive meal data ecosystem that caters to people's individual lifestyle needs; and perhaps incentivise them to lead healthier, more sustainable lifestyles. "We could see a world where all of a sudden people have a perfect record of their diet, and they know that they have to hit a certain goal or be within certain boundaries and then they are told what to eat or what not to eat," says Mocci.

"Meal delivery companies could offer Diet Cycling services containing personalised meals and ingredients for each day of the week," says DaVanzo. "Proteins, carbs, fats and vitamins could be

cycled throughout the week according to what our diaries demand, so that the food people eat primes their minds and bodies to reach the goals people have set for themselves."

The collaborative effort could also extend to hyperlocal farming initiatives that cater to dietary needs of local communities. The world population is set to grow by another two billion people by 2040, while climate change is going to shrink the amount of land available to grow food. This could mean vertical farms may play a key role in the food security of our growing population.

Vertical farms in 2040 could manifest in high-rise buildings where the majority of the floors will be devoted to growing various plants in beds stacked vertically one over the other, fed by LED lighting and nutrient infused water customised for each species. With these innovations, more people could become fractional farmers and have micro vertical farms at home to grow vegetables, grains, fruits, herbs and salads that suit the dietary needs of a local community.

"Meal delivery companies could expand their operations to also pick up these ingredients from these micro farms, thereby improving their ability to deliver hyper-local food and beverages," says DaVanzo. "Similarly, empty office space in cities could be converted to certified urban farms, and meal delivery companies could collect ingredients from homes and offices and deliver them back to restaurants. The 5 Minute City could be a real concept with fresh ingredients sourced within 5 minutes of where a meal is being prepared."

# “

**THE 5 MINUTE CITY COULD BE A REAL CONCEPT WITH FRESH INGREDIENTS SOURCED WITHIN 5 MINUTES OF WHERE A MEAL IS BEING PREPARED.”**

**Sarah DaVanzo**  
Data-driven Futurist



## THE RISE OF ME-GANISM

# AUGMENTED KITCHENS



**When it comes to the in-home food experience, smart cooking, cleaning and food circulation devices (that automatically recycle and reuse waste food and packaging) could transform how people engage with meals. The global smart kitchen appliances market size was valued at £10.8 billion in 2021 and is expected to expand to £161 billion in 2040<sup>1</sup>.**

"AI and smart kitchen devices could create an optimal food plan for the week, and help people to order the right ingredients and meals," says Pour. "So could AI technology make the perfect cup of tea every time based on our flavour, colour and temperature preferences? Absolutely."

With the intention of creating the ultimate tea machine, BRU Maker One is an intuitive and customisable tea maker that has set the standard for devices that make convenient, consistent and customisable beverages. It is like a coffee machine, but for tea,

<sup>1</sup> Grand View Research, 2022.

2021



**£10.8bn**

**GLOBAL SMART KITCHEN  
APPLIANCES MARKET SIZE**

“

**AI AND SMART KITCHEN DEVICES COULD CREATE AN OPTIMAL FOOD PLAN FOR THE WEEK, AND HELP PEOPLE TO ORDER THE RIGHT INGREDIENTS AND MEALS.”**

**Kaave Pour**

Co-founder of Space10

that people can fill with herbs or tea bags, then select their preferred water temperature, the dispensing amount in millilitres and how long they want the tea to brew for.

Kitchen appliances and gadgets could also become increasingly connected to people's social media presence, so much so that someone's Personal AI could take over kitchen appliances for an evening and cook a delicious, personalised meal. No cookbook necessary.

"I love the idea that famous chefs could offer at home AI cooking experiences to their fans as a new method of interactive marketing, allowing consumers' personal AI to inhabit the chef's persona, and take what it knows about them and the chef's expertise and recipes to produce something that is truly gourmet, unique and personalised; or even coach someone through how to cook something that only a 5-star chef could know how to do," says Cheesewright.

2040



**£161bn**

**PREDICTED GLOBAL SMART KITCHEN  
APPLIANCES MARKET SIZE**



## THE RISE OF ME-GANISM PRINTED FOR ONE

“

**THE FUTURE OF FOOD FOR ME CERTAINLY MEANS ENJOYING PRINTED ALTERNATIVES TO ANIMAL PROTEIN AS THERE IS A STRONG TREND TOWARDS MASS CONSUMPTION OF PLANT-BASED FOODS THAT ARE POSITIVE TO THE ENVIRONMENT BY 2040.”**

**Georgie Barrat**

Technology Journalist and TV Presenter

**From packed lunch to printed lunch — advances in 3D food printing could enable people to customise the shape, density, look and feel of food to suit their desires. So say goodbye to foods not looking or tasting the way we want them to.**

Scientists at Columbia University have created a seven-ingredient vegan cheesecake that was assembled entirely by a 3D-printing machine using edible food ink from graham crackers, peanut butter, Nutella, banana puree, strawberry jam, cherry drizzle and strawberry frosting; and then cooked using laser technology as the food is printed. The heat the lasers provide changes the paste to solid.

This type of 3D printing technology could allow people to control the nutrients in their food. “3D printing portion size is going to be really interesting, particularly when our Personal AI has all that data about someone’s lifestyle goals and needs,” says Cheesewright. “If you can portion food, for example with a high density of plant-based proteins and vitamins, precisely in an automated way it could stop someone overfilling their plate.”

The customisability of 3D printing technology also makes it particularly practical for the plant-based meat market, where texture and flavour need to be carefully formulated to mimic real meats. So does this also mean people could be able to rediscover the taste of scarce foods like meat in 2040? “The future of food for me certainly means enjoying printed alternatives to animal protein as there is a strong trend towards mass consumption of plant-based foods that are positive to the environment by 2040,” says Barrat.







# EAT TO THRIVE

Image: Deliveroo's Snack to the Future report predicts Deliveroo's In 2040, people could desire a deeper connection with their food and visit 'restaurants' to restore their minds as well as their bodies. Smart glasses will be left at the door and 'flavour concentration booths' could fully immerse people in the look, sound, aroma and taste of a meal by simulating natural environments like forests, seashores and even being in the clouds.







## INSIDE THIS SECTION

In 2040, one of the major forces that could shape how and why people enjoy food is healthy food options and experiences. Health and wellbeing is rapidly entering every aspect of people's lives, and many food companies are redefining the products and services they offer so that people can enhance their bodies and minds.



### TOP TOPICS IN THIS SECTION

# 1

Affordable tablet-based and liquid foods could be commonplace

# 2

Most people could be eating synthetic foods to get their health fix

# 3

People could know where every meal comes from, how it was made and monitor the wellness benefits

# 4

Mindful eating could explode as more people seek peace of mind when they eat

# 5

Increased health consciousness could compel many more people to food that is better for themselves and the planet





## EAT TO THRIVE

# WIDESPREAD WELLNESS



“

**I THINK THE WORLD WILL BECOME MORE CONSCIOUS ABOUT EATING CERTAIN TYPES OF FOODS, AND A GROWING PART OF THE POPULATION WILL CHANGE THEIR BEHAVIOUR AS A FUNCTION OF THAT.”**

**Carlo Mocchi**

Chief Business Officer UK&amp;I at Deliveroo

The global health and wellness market is currently worth £5.7 trillion<sup>1</sup>. With a growing burden of physical and mental diseases and an increased awareness regarding health and wellness solutions, the industry could be worth £24 trillion by 2040<sup>2</sup>. In fact, ‘Personal Care & Beauty’ and ‘Healthy Eating, Nutrition & Weight-Management’ are the largest sectors in the wellness economy, and these sectors combined already account for 44% of the global wellness market<sup>3</sup>.

“I think the world will become more conscious about eating certain types of foods, and a growing part of the population will change their behaviour as a function of that,” says Mocchi. “I think it will become table stakes for any food people buy and consume.”

An increased health consciousness could compel many more people to prioritise healthy, local food that is traceable and a boost to their physical and mental immune system. But it could also mean people will want to understand where each meal comes from, what it is made of, what they should eat more of, or less of, both for the betterment of themselves and the planet.

2023

**£5.7tn****CURRENT VALUE OF THE GLOBAL HEALTH AND WELLNESS MARKET**

2040

**£24tn****PREDICTED VALUE OF THE GLOBAL HEALTH AND WELLNESS MARKET**

1 Allied Market Research, 2023.

2 Avansere, 2023, using CAGR figures from Precedence.

3 Global Wellness Institute, 2023.

## EAT TO THRIVE NEW NUTRITION

“

**THE MAJORITY WILL MAKE UP FOR THE GAPS IN THEIR DIET BY CONSUMING LAB-MADE FOODS THAT PROVIDE MEDICAL OR HEALTH BENEFITS, INCLUDING THE PREVENTION AND TREATMENT OF DISEASE.”**

**Tom Cheesewright**  
Applied Futurist

**By 2040, new forms of nutrition could be the norm for people as climate change and overpopulation contribute to future food shortages and potential instability in developing parts of the world. Many of the plant varieties that are grown today (like grapes, coffee, cocoa, avocados, potatoes and wine and bananas) might not be available because they are unable to meet the climate challenges of tomorrow<sup>1</sup>. There might also be a surge in the innovation of new edible plant species that are disease-resistant, pest-resistant, herbicide-resistant, drought-resistant, salt water tolerant, more adaptable to extreme temperatures, while also being grown more productively and providing more nutrition.**

With synthetic biology, scientists will be able to make entirely new forms of food or new twists on existing foods. These genetically modified foods will protect our traditional staple foods from the extreme environments climate change will bring about over the coming decades. The global genetically modified seeds market size is projected to rise from £16 billion in 2018 to £53 billion in 2040<sup>2</sup>.

Meanwhile, many more once-obscure superfoods will also enter people's diets. Some of our favourite foods are under threat as climate change gathers speed. With only 15 plants contributing

to 90 percent of humanity's energy intake, losing just one staple crop could spell disaster. Yet there are more than 7,000 varieties of edible plants worldwide. Alternative ingredients like fonio, grains like amaranth and other plants like millet, sorghum, wild rice, teff, farro, khorasan, einkorn and emmer could become mainstream in the developed world. These types of food need very little water, which makes them a good choice for an increasingly drought-prone world. With the global superfoods market size expected to grow from £130 billion in 2022 to £306 billion in 2040<sup>3</sup>, superfoods like these will expand the variety of our diets and protect the global agricultural industry from over-specialisation.

“Will I want granny's homemade soup with vegetables from her allotment, or perhaps a poké bowl full of fresh, line caught fish and shredded organic carrots; or will I want something that's pitched to me as having this beneficial effect because it's been engineered to do so,” says Cheesewright. “Some people will be able to choose super fresh food that is grown organically; while the majority will make up for the gaps in their diet by consuming lab-made foods that provide medical or health benefits, including the prevention and treatment of disease,” says Cheesewright.

**£53bn**

**PREDICTED GLOBAL GENETICALLY  
MODIFIED SEEDS MARKET SIZE IN 2040**

**£306bn**

**PREDICTED GLOBAL  
SUPERFOODS MARKET SIZE IN 2040**

**7,000+**

**VARIETIES OF EDIBLE PLANTS WORLDWIDE**

<sup>1</sup> Dr. Bárbara Goettsch, who led a study called 'Plants, People, Planet', 2021.

<sup>2</sup> Fortune Business Insights, 2019.

<sup>3</sup> IMARC Group, 2023.





# EAT TO THRIVE

## SUSTAINABILITY ON-DEMAND

**Alongside eating more varied plant-based food, eating what is in season is a critical way to improve food systems<sup>1</sup>. Seasonal eating could become so mainstream in 2040 that grocery stores, meal delivery companies and delivery-only kitchens could become seasonal first and only sell fresh produce that is in season locally. Say goodbye to seeing fresh strawberries on the shelves during winter.**

At least 65% of consumers already want to make the right spending choices to live a healthier and more sustainable life, and global food systems are on a trajectory to be more sustainable, while properly nourishing the growing global population<sup>2</sup>. Increasing preference for home-cooked and chef-cooked food that is eco-conscious could be a major factor here. The global meal kit delivery services market is expected to rise from £19 billion in 2023 to £247 billion in 2040<sup>3</sup>; and the vegetarian meal kits segment of this market is expected to grow fastest due to an increased adoption of fresh, healthful, plant-based and cruelty-free diets across the globe<sup>4</sup>.

“In 2040, it could be more common to order meals made from ingredients only within a hundred mile radius. Obviously that means less choice, but I think eating seasonally and locally could be the right thing to do by the planet,” says Pollard.

## 65%

OF CONSUMERS WANT TO MAKE THE RIGHT SPENDING CHOICES TO LIVE MORE SUSTAINABLY AND HEALTHILY

## £247bn

PREDICTED GLOBAL MEAL KIT DELIVERY SERVICES MARKET IN 2040

## “

**IN 2040, IT COULD BE MORE COMMON TO ORDER MEALS MADE FROM INGREDIENTS ONLY WITHIN A HUNDRED MILE RADIUS.”**

**Tracey Pollard**

Managing Director of Bruce Gillingham Pollard

1 World Wide Fund for Nature (WWF), 2023.

2 World Economic Forum, 2023.

3 Grand View Research, 2022.

4 Grand View Research, 2022.



## EAT TO THRIVE EAT GOOD, LOOK GOOD

“

**MIND-TO-SKIN FRIENDLY FOOD COULD HELP RELIEVE STRESS NATURALLY. SIMILAR DIETS COULD INCLUDE HORMONE-BALANCING MENUS AND DOPAMINE DINING AND DRINKING, WHICH COULD INCREASE LEVELS OF PLEASURE, SATISFACTION AND MOTIVATION.”**

**Sarah DaVanzo**

Data-driven Futurist

**In 2040, people should have developed a deeper understanding and awareness of lifestyle choices and their impact on body, mind, skin and hair. With 50% of people in Europe already defining beauty as ‘looking healthy’, more people could prioritise prevention and protection when it comes to health and beauty returns, and focus on skincare, balanced diets, and active lifestyles to achieve this.**

“I think a convergence between beauty, health and what you eat might happen at some point,” says Mocci “Smart food platforms via connected devices could take a number of signals based on a function of someone’s body and desired appearance, and provide recommendations of what they should eat.”

The growth of beauty and anti-ageing products, projected to reach £100 billion by 2030<sup>2</sup>, is a major contributor to the global health and wellness industry. The food and beauty industry could become more integrated than ever, promoting beauty and wellness from the inside out through the creation of edible beauty products that enhance both nutrition and skincare routines. Say goodbye to anti-ageing cream and hello to anti-ageing ice-cream.

**£100bn**

**PROJECTED GROWTH OF BEAUTY AND ANTI-AGING PRODUCTS BY 2030**

“People’s diets could increasingly cater to a range of health demands. For example, psychonutrition diets, containing ingredients like oatmeal, salmon and dark chocolate, could treat skin disorders such as eczema, which are worsened by emotional stress,” says DaVanzo. “Mind-to-skin friendly food could help relieve stress naturally. Similar diets could include hormone-balancing menus and dopamine dining and drinking, which could increase levels of pleasure, satisfaction and motivation. I can imagine seeing dermatologist recommended meals and medically approved menus being integrated into meal delivery apps.”

In addition, we could see the rise of ‘digital twins’ (digital representations of real-world physical objects and people), with people having a future avatar version of themselves. Imagine this being the feature of a ‘Who Do You Think You Could Be’ streaming series. “I can see people having a simulation of someone that has got the same genetic makeup as them and then they can see the impact of different eating choices over a long period of time,” says Barrat. “So someone could check to see what they look like if they stick to a vegan diet, how their body could respond, and what their health condition could be like in 10 or 20 year’s time.”

**50%**

**OF PEOPLE IN EUROPE DEFINE BEAUTY AS ‘LOOKING HEALTHY’**

<sup>1</sup> Euromonitor, 2022.

<sup>2</sup> Custom Market Insights, 2022.



## EAT TO THRIVE ALT-OHOL

“

**CULTURAL TRENDS LIKE A RAPIDLY AGEING POPULATION AND HUGE ALCOHOL RELATED COSTS TO THE HEALTH SYSTEM COULD DRIVE HEALTH-BASED INNOVATIONS IN ALL ALCOHOL SECTORS.”**

**Tom Cheesewright**  
Applied Futurist

**When it comes to blending health and indulgence, innovation in the non-alcoholic category could complement the desire to look and feel well, by drinking well. With the non-alcoholic wine market predicted to be worth £7.7 billion (\$10 billion, €8.4 billion) by 2027<sup>1</sup>, a wave of sophisticated wine alternatives are pairing high standards of taste with healthier living.**

“This is clearly the direction of travel for alcohol, and people could place a much greater focus on fitness, beauty and health than ever before,” says Cheesewright. “Cultural trends like a rapidly ageing population and huge alcohol related costs to the health system could drive health-based innovations in all alcohol sectors.”

<sup>1</sup> Fact.MR, 2022.

A new wave of sophisticated alcohol alternatives could pair people's high taste standards with desires for healthier living. In 2040, people could regularly savour wine-inspired cordials formulated to mirror the dryness and depth of wine but fortified with vitamins and nutrients designed to keep them fit and healthy while still delighting their palates. People could look forward to raising a glass of 'wine' that could, actually, help them live longer.

2027



**£7.7bn**

**PREDICTED VALUE OF THE  
NON-ALCOHOLIC WINE MARKET**







## EAT TO THRIVE

# MINDFUL MEALS



**Climate change, a population spurt, an excess demand for meat in emerging economies, and new sciences and technologies — in 2040 there could be an accelerated demand for food delivery services to help people understand where their food comes from, and what impact their food has.**

“If we can transform the way people eat and consume food, that would be huge,” says Mishra. “Especially when it comes to food waste, for example. Through technological and supply chain innovation, meal delivery companies could help to eliminate food waste in the world. That is something that excites me.”

With the global carbon footprint management market projected to triple in size in the next five years to £25 billion in 2028<sup>1</sup>, more people should be able to track and trace how healthy their meals are for people and the planet. “Blockchain technology is going to be really important to know exactly what you are eating and where it came from,” says Barrat. “People might be able to scan a product and see enormous amounts of information about the food; where each ingredient of a meal came from; from the hygiene and sustainability credentials of the kitchen and vehicle that transported the meal to you.”

“

**THE HEALTH AND WELLNESS TOPIC WILL CENTRE ON PEACE OF MIND THAT WHAT SOMEONE IS BUYING IS GOOD FOR THE PLANET, THEIR BODY AND THEIR MIND.”**

**Kaave Pour**

Co-founder of Space10

“The health and wellness topic will centre on peace of mind that what someone is buying is good for the planet, their body and their mind,” says Pour. “The big opportunity over the next 15 years will be how companies can bring sustainability and personal health together in an affordable way, and in a way that decreases levels of eco-anxiety.”

Meal labelling will be an interesting element of this opportunity. “I think there could be a revolution in food transparency,” says Pour. “Pretty food images will not be enough when ordering and I think there could be a massive emphasis on showing consumers whole-system transparency in the food value chain.”

Health and wellbeing transparency could work in a similar way. “If someone has had a headache for the past two days, their AI doctor could analyse everything they have eaten and spot anything that might be a bit deficient in, like magnesium or iron” says Barrat. “The AI could then recommend what foods to eat more of, suggest natural, ancient remedies that have been forgotten, or even tell a person’s 3D printer to make you some extra magnesium tablets to supplement what they’re eating.”

<sup>1</sup> Markets and Markets, 2022.

## EAT TO THRIVE FOCUSED FOODIES

“

**I LIKE THE IDEA OF RESTAURANTS BEING A HAVEN FROM THE BUSY CITY.”**

**Georgie Barrat**

Technology Journalist and TV Presenter

**In order to find peace of mind when people dine, people could desire a deeper connection with their food and visit ‘restaurants’ that celebrate the French verb restaurer, ‘to restore oneself’. Whether it could be normal for wellness-minded maître d’s to request people switch off their digital devices; silent restaurants; or restaurants that only offer booths for one to maximise ‘flavour concentration’ — there could be a trend towards fully immersing one’s body and mind in the look, sound, aroma and taste of food.**

“I like the idea of restaurants being a haven from the busy city, with people being able to dine in immersive pods inside the space that simulate natural environments like forests, seashores and even being in the clouds,” says Barrat. “Parties dining could order restorative ice-cream from a holographic menu in their ethereal ice-cream parlour pod, while solo diners could sit crossed legged in immersive pods surrounded by textural grasses and calming surfaces.”

“In cities of the future this will make sense, with a thriving food scene and expanding population, where eating out could increasingly be designed around enhancing people’s individual health needs to de-stress (with ingredients like asparagus, berries and dark chocolate) or counter air pollution (with ingredients like turmeric and ghee that relieve cough and irritation in lungs caused by air pollution)”, says Pollard.

With social media making people’s ‘conversations’ less sincere, the enhancing of social skills could become a priority for many in the future. With 40% of British 16-25-year-olds currently anxious about socialising with people and not knowing how to make new friends<sup>1</sup>, in 2040 people could put a premium on restaurants that create conditions for deeper connection with others.

“I think it could be a cultural norm in 2040 that people take their smart glasses off when they enter a restaurant. The future equivalent of ‘no phones at the table’ is people take their glasses off because these could be the new phone, serving data and updates in front of people’s eyes and connecting to all other devices,” says Cheesewright. “Going on a date in a restaurant could be really interesting. Imagine that moment of deep connection where two people take their smart glasses off and talk without the assistance of their AIs,” says Cheesewright. “Now that’s intimacy.”



# TUCK INTO THE FUTURE

Image: Deliveroo's Snack to the Future report predicts that in 2040, people could use augmented and virtual reality technologies to create multi-sensory food experiences and simulate dining somewhere else in the world or eating with people elsewhere in the world from the comfort of their homes.







## INSIDE THIS SECTION

In 2040, meal experiences using virtual reality and augmented reality technology could provide new and unique ways to experience and interact with food. Many people are already intrigued by these ‘Metaverse’ technologies, a term to describe the next generation of the internet.



### TOP TOPICS IN THIS SECTION

# 1

People's digital and physical engagement with food could fully converge

# 2

Virtual and augmented reality technologies could enhance where, how and what people eat and drink

# 3

Virtual dining experiences could get so sophisticated that people could feel like they are sitting and eating with others from around the world

# 4

Virtual food tourism means people could be able to fine-dine in whichever location they dream of

# 5

Digital game-infused dining could create playful, immersive and meditative meal-time experiences



## TUCK INTO THE FUTURE METAFOOD RISING

“

**THE LOOK, SOUND, SMELL OF A CRUNCHY FOOD COULD BECOME ALL THE MORE CRUNCHIER IN THE METAVERSE.”**

**Tom Cheesewright**  
Applied Futurist

**76%**

**OF CUSTOMERS EXPECT THE METAVERSE WILL DRIVE DISRUPTION IN INDUSTRIES LIKE RESTAURANTS**

<sup>1</sup> Acumen Research and Consulting, 2022.  
<sup>2</sup> Wunderman Thompson, 2022.



**What is the Metaverse? The Metaverse is an extension of our lives enhanced by technologies like virtual reality and augmented reality. With the virtual and augmented reality market predicted to grow from £19 billion in 2021 to £350 billion by 2030<sup>1</sup> we could see new ways to elevate how people order and enjoy meals.**

The impact of Metaverse technologies like virtual reality and augmented reality are predicted to be significant across industries. The vast majority of consumers today expect the Metaverse will drive disruption in industries like restaurants (76%) and food and drink (74%)<sup>2</sup>. As a result, the world of food in 2040 could even enable higher levels of self-expression and self-esteem among future eaters.

While today we can experience the Metaverse by entering distinct virtual worlds and experiences, in 2040 the Metaverse could expand into an interconnected and limitless world where people's digital and physical engagement with food fully converge.

“I think ASMR-style food content in the Metaverse could expand, with the therapeutic ‘brain tingles’ people experience being amplified by smart glasses. The look, sound, smell of a crunchy food could become all the more crunchier in the Metaverse,” says Cheesewright.

“For example, augmented artificial smell technology is also getting really good. Most smells are made up of a relatively small number of chemical elements, and when a device synthesises in different formulas it recreates any smell. Meal delivery companies in 2040 could provide tools like this on their platforms.” Can't decide between a burrito or poke bowl? Imagine, when ordering on food-delivery platforms, you can virtually smell and taste the food before you order, helping consumers to reduce time deciding between a wide-selection of cuisines and dishes.

2021



**£19bn**

**VALUE OF THE VIRTUAL  
AND AUGMENTED REALITY MARKET**

2030



**£350bn**

**PREDICTED VALUE OF THE VIRTUAL  
AND AUGMENTED REALITY MARKET**

## TUCK INTO THE FUTURE

**DISCOVERING DELIGHTS**

**Food will always be a focal point in social gatherings, celebrations and cultural events, and restaurants and meal delivery companies in 2040 could deliver out of this world ways to enjoy food with other people.**

“When it comes to discovering (new) food there is a massive gap that could be closed by the introduction of advanced simulation technologies. Our choices are still driven by human activity, and algorithms don’t yet truly influence people’s behaviours,” says Cheesewright. “But when you’ve got a virtual or augmented food and drink environment, like a restaurant, people will be much more attracted and immersed compared to a 2D experience. Imagine a digital menu with three-dimensional representations of steaming hot food. If it’s a cold day and I see a steaming bowl of pho, then I’m like, yeah, let’s order now.”

The same goes for making family food moments all the more inclusive and enjoyable. “I could easily imagine children in the future that don’t like to eat their vegetables, putting on smart glasses and thinking they are eating candy. Technologies like this could trick people’s brains into thinking they are eating something more adventurous, luxurious or indulgent,” says Pour.

“A percentage of what we know we eat is based on what we see, it is how we interpret these things that make us understand what it is we are eating,” says Barrat. “When we look at the food in front of us, our brain processes our perception before we actually put the food into our mouth. So in 2040, someone could use augmented reality technology to jazz up their ‘courgetti’ to make it look like a delicious creamy bowl of pasta. Yummy, and healthy.”

“

**IN 2040, SOMEONE COULD USE AUGMENTED REALITY TECHNOLOGY TO JAZZ UP THEIR ‘COURGETTI’ TO MAKE IT LOOK LIKE A DELICIOUS CREAMY BOWL OF PASTA.”**

**Georgie Barrat**

Technology Journalist and TV Presenter



## TUCK INTO THE FUTURE WHEREVER YOU WANT



**In 2040, people could use augmented and virtual reality technologies to create multi-sensory food experiences in simulated environments that enhance the eating experience. For example, people could recreate food moments from famous movies with famous people; and enjoy meals with digital ‘twins’ of friends and family members that are physically far away or even, no longer alive. “Virtual reality could be so good that people could really think they are having a delightful breakfast at Tiffany’s while they’re tucking into a bacon sandwich on the sofa,” says Barrat.**

“If we view meal enjoyment from a first principle perspective, we know that people love sharing food experiences with each other, and we know that they love travelling to new places. I can’t see a reason why new technologies won’t help augment these desires in the future,” says Mishra. “It may not replace the real thing, but I can imagine being able to experience a simulation of a top holiday destination like Thailand, and enjoying the world’s best Pad Thai dish, with my family, from the comfort of our home. That would be amazing.”

“

**VIRTUAL REALITY COULD BE SO GOOD THAT PEOPLE COULD REALLY THINK THEY ARE HAVING A DELIGHTFUL BREAKFAST AT TIFFANY’S WHILE THEY’RE TUCKING INTO A BACON SANDWICH ON THE SOFA.”**

**Georgie Barrat**

Technology Journalist and TV Presenter

Enabled by 6G high speed bandwidth, people could have a wall-sized digital screen that acts as a portal to connect real-time to other people’s homes or elsewhere in the world. “These portals could simulate dining somewhere else in the world or eating with people elsewhere in the world. A meal delivery company could provide enhanced human connections between people around the world by delivering the same food in two parts of the world simultaneously so that they can break bread together real time,” says DaVanzo.

## TUCK INTO THE FUTURE PLAYING WITH FOOD

2023

**£278m**CURRENT VALUE OF THE  
GLOBAL MEAL DELIVERY MARKET

2040

**£784m**PREDICTED VALUE OF THE  
GLOBAL MEAL DELIVERY MARKET

**The global meal delivery market is set to continue to grow from £278 million in 2023 to £784 million in 2040<sup>1</sup>, and to remain competitive in this thriving market we could see meal delivery companies innovating how people immerse themselves in food experiences. For example, the therapeutic potential of eating and drinking could be enhanced with the adoption of augmented reality technologies; and gaming-infused dining could create playful, immersive and meditative meal-time experiences.**

Already, cooking is the second highest-ranked activity among generations to inspire creativity, with 62% of today's Generation Z saying it makes them feel more inspired. Gaming has also replaced meditation in the top 10 activities that make Gen Z consumers feel creative<sup>2</sup>.

"In 2040, when people eat they will want to challenge their senses like never before. From sensory deprivation, to sensory amplification, to synaesthesia, where people experience one of their senses through another; meal delivery companies could create augmented, playful meal experiences with imagery, sounds and packaging. For example, spicy foods could taste more spicy served from spiky shaped bowls, where creamy foods could taste more creamy from the rounded, blobby shaped bowls.", says DaVanzo.

<sup>1</sup> Statista, 2022.

<sup>2</sup> Harris Poll, 2020.

Famously, Heston Blumenthal's Sound of the Sea showed that eating an oyster whilst wearing headphones playing seaside sounds made the dish taste saltier. "We could definitely see the rise of meals for different mood states and mood swings. Meal delivery companies might even offer people 'foodgasms', as in braingasms via what they eat", says DaVanzo.

Can virtual food look so good that you can taste it? Can visuals and sound alone evoke the sensation of hunger? A new wave of food gaming experiences are starting to blur the boundaries between dining, entertainment and social networking. Upcoming PlayStation title Nour is a video game that's all about aesthetics, and where the only goal is to play with food — or the utensils and equipment used to make, manipulate, serve, or consume it. The game features hundreds of hyper realistic, stylised, interactive food items spanning 21 different courses, and its developers use reactive audio and visuals in the game and haptic content in users' devices to immerse players in the food content.

"This could transform the new movie night experience," says Kaave. "So instead of just watching a film like Jungle Book together, a family in 2040 could dive into a lifelike virtual jungle experience, that is gamified, while eating a meal from that environment. This type of experience could be really important for parents who live in high rise city apartments and need to activate children. They can transport their minds into simulated natural surroundings, which we know has a positive impact on people's mental health."







## TUCK INTO THE FUTURE

**FANTASY FOOD MARKETS**

“

**MEAL DELIVERY COMPANIES WILL ONLY BE SUCCESSFUL AS LONG AS THEY CAN DELIVER THE NEXT UNEXPECTED PRODUCT.”**

**Carlo Mocci**

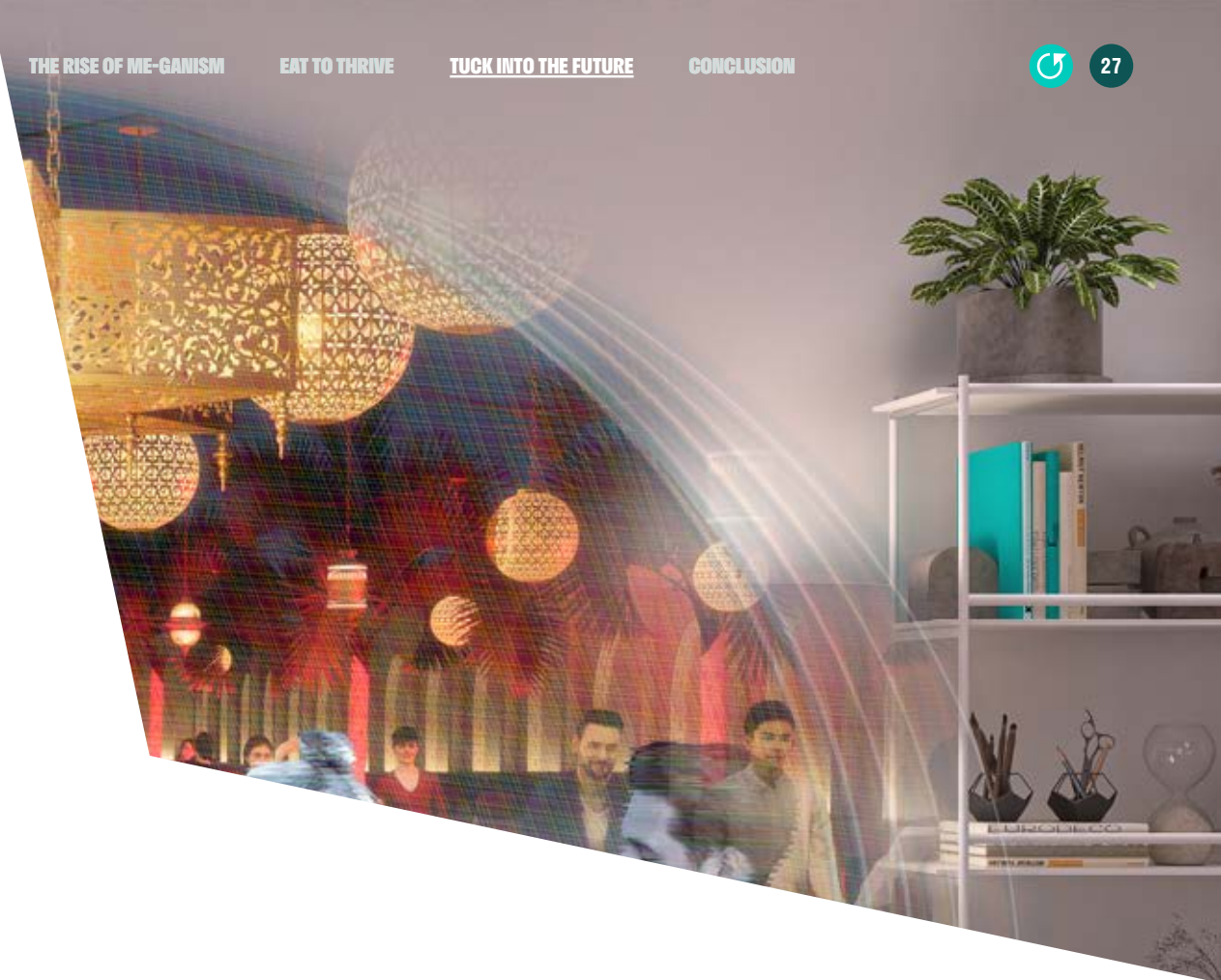
Chief Business Officer UK&amp;I at Deliveroo

**Meal delivery companies in 2040 could find new ways to interact with their consumer base via Metaverse meal order experiences where people can connect, play and interact with food. “In 2040, I love the idea of people having nostalgic videos of food moments they really enjoyed in the past, like an authentic Kefta tagine in a Marrakech Souk,” says Barrat. “This could lead to suggestions of what to put in their virtual shopping to recreate that meal again tonight; and a virtual masterclass on how to cook it.”**

TikTok has already moved into the at-home hospitality space with the launch of TikTok Kitchen, a partnership with restaurant supplier Virtual Dining Concepts. To begin with, TikTok Kitchen offers dishes that the platform has made viral, such as baked feta pasta – a dish that was so popular it led to feta supply chain issues across the United States.

“Having augmented, immersive ways of interacting with the idea of a food order could enhance why people choose a dish,” says Barrat. “When browsing a menu in a virtual world it could be like actually travelling around the world, experiencing the history of a dish, immersing in cultural experiences related to when it is eaten, learning where different ingredients come from by visiting the farms that grow the crops. People could feast all their senses on extra layers of rich information about what you’re about to eat.”

“Meal delivery companies will only be successful as long as they can deliver the next unexpected product. Most people enjoy discovering something new and unique when they eat out or order in food, so the challenge and the opportunity for players like us is we push the boundaries of meal ordering and unlock new forms of food enjoyment,” says Mocci.





# CONCLUSION

In the last ten years much has changed when it comes to food production, hospitality, retail and consumption. The meaning of meal delivery has evolved amidst transformative technological, economic and social tailwinds, so what better time to look ahead to the future of food delivery and enjoyment in 2040.

**Higher demand for convenience and personalisation could transform where food is made, served or delivered from.** It's clear over the coming decade that enhancing people's ability to discover new food experiences is going to be central to the market for tailored meal delivery services. With personalised nutrition and at-home diagnostics kits, more and more people are going to have a better understanding of why, how and what meals are better for their bodies and minds. Central to this future is artificial intelligence, and in particular Personal AIs, as predictive approaches to food and meal commerce helps to automate people's orders based on their preferences and needs. This is why Me-ganism will dominate future lifestyles and transform the concept of meal delivery from being about convenience to creativity.

The adoption of Me-gan diets could underpin why we could see Personal AIs gathering data about the way people work, learn, exercise or sleep for instance from the spaces they regularly use. The result would be tailored food and drink served when someone is in various spaces; and furthermore, diet intelligence services teaming up with retailers to incorporate personalised nutrition into the shopping experience. This reality will extend to augmented in-home food experiences via smart cooking, cleaning and food circulation devices; and usher in advances in 3D food printing and cell-based meat production that could enable people to customise the shape, density, look and feel of food to suit their desires.

**Meanwhile, the combination of a desire for health and personalisation could enhance the concept of meal delivery.** The rising demand for things like functional, healthy and anti-ageing food products could be major contributors to food delivery and enjoyment becoming centred on wellness. New forms of affordable nutrition could be the norm with super and synthetic foods becoming mainstream and expanding the variety of people's diets. All of which could be supported by advanced meal delivery services that could have sophisticated AI-driven diagnostic tools

that cater to people's lifestyle needs; and perhaps incentivise them to lead healthier lifestyles.

As a healthy body becomes more important to people, so too could a healthy mind. One way this could appear is in mindful eating. People could desire a deeper connection with their food and dine in 'restaurants' that celebrate the French verb restaurer ('to restore oneself'), and fully immerse people in the look, sound, aroma and taste of food, with no distractions.

**When it comes to food enjoyment, new augmented and virtual reality technologies could do wonders to people's meals.** We could see a new wave of food gaming experiences that bridge the gap between food, entertainment and wellbeing. Kitchen appliances and smart gadgets could connect to people's social media and Metaverse presence, so much so that someone's Personal AI could take over the kitchen for an evening, personify a famous chef, and cook a delicious, personalised meal.

People could also use technologies to create multi-sensory food experiences in simulated environments that enhance the eating experience. From recreating food moments from famous movies, to enjoying meals with digital 'twins' of friends and family or famous people — hyper real generative AI representations of other people, cuisines and cultures could provide opportunities for people to explore and appreciate new flavours and culinary traditions virtually. In an age of more food resource scarcity and environmental no-no's, like flying, people in 2040 could want the things that they can't have. Not being able to go wherever you want to go in the world, to experience cultures or visit people they know, could be a driver for technologies that can break down national borders and make everyone's dreams and experiences come true.

**Personalised and convenient. Augmented and virtual — the future of food delivery and enjoyment is set to be an intriguing, immersive and innovative space to see emerge.**



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