FutureBridge

Agri-Food Look-Back & Contrarian Megatrends 2026

How Consumomics™ Explains Why Big Food Food Recaptures Value

A strategic analysis for senior brand management leaders in the **Food and Nutrition sector**, examining the behavioral genome shifts reshaping competitive advantage in 2025 and beyond.

Agri-Food at a Tipping Point

2025 is not just "more volatility" for food and agriculture.

It is the year when:

- GLP-1 and Food-as-Medicine compress some demand but intensify it elsewhere elsewhere
- Ultra-processed backlash matures, splitting trust into science vs story
- Alt-protein hype collides with plateauing sales
- Private label becomes a true platform, not just a cheap copy
- Retailers finally reset shelves after a decade of insurgent proliferation

FutureBridge has used **Consumomics™** , our behavioral genome model – to read these shifts across:

- Global CPG and retail portfolios,
- Major cooperatives and processors,
- PE/M&A activity.

The conclusion is contrarian but clear:
2025 is the year Big Food and Big Ag start to recapture value and many insurgents quietly begin to lose share. share.

From "Consumer Chaos" to a Demand Genome

Most megatrend decks describe what is happening. **Consumomics™** explains **why** it is happening and **how to act.**

Our core equation:

Behavior = (P + E + C + A) × V

P – Provisioning / Price

Economic value and affordability considerations

E – Emotion & Identity

Personal values and self-expression through food food choices

C – Convenience & Cognitive Load

Ease of access and decision-making simplicity

A – Automaticity / Ritual

Habitual behaviors and routine consumption patterns

V – Trust (Regulatory Genome)

The multiplier that determines if any factor can express

We score PECA-V for consumers and categories, map shoppers into Consumer Genomes™ (Budget Protectors, Health Optimizers, Habitual Ritualists, Sustainability Ritualists, Sustainability Champions, etc.), estimate U-variable (latent potential) by category and brand, and show how Big Food & Big Ag can engineer demand rather engineer demand rather than just observe it.

The **five megatrends** that follow are not slogans. They are shifts in PECA-V and U that explain why strong incumbents get stronger and label-only insurgents lose their grip.

Megatrend 1

GLP-1 Compresses Junk, Concentrates Value

The headline consensus on GLP-1 is that the category threatens all food volume. The data tells a more nuanced story.

First, the data is often misunderstood. A 2024 KPMG study found that consumers on GLP-1 drugs cut GLP-1 drugs cut caloric intake by 21% and reduce grocery spending by 31%. That is survey based survey based when the consumer is first on the medication. The reality is about 6-8% of calories are calories are reduced longer term. Still significant. But the compression isn't random.

Where demand is collapsing:

- **Frequent, low-occasion snacking and impulse categories** (candy, salty snacks, energy drinks)
- **Volume-driven Fast Casual and QSR visitation**
- **Lower-price-point CPG** where margin was driven by repeat frequency, not margin per unit

Where demand is consolidating:

- **Protein and nutrient-density** (the GLP-1 user drinks fewer beverages, but makes them count)
- **Trusted meal rituals with proven nutrition** (breakfast brands, protein platforms, recovery meals)
- **Premium, science-backed categories** where consumers view purchase as health outcome, not casual consumption

GLP-1 Impact: The Consumomics™ Genome Analysis

The core mechanism: GLP-1 users are eating fewer occasions but higher-intention occasions. Brands that built loyalty on sensory experience alone (packaged snacking, "indulgence") lose frequency. Brands with functional identity and ritual anchor (Fairlife, Starbucks protein line, Kellogg's/General Mills structured breakfast SKUs) see less damage and sometimes category-share gain.

Implication: GLP-1 doesn't kill brands with strong, defensible positions in high-occasion categories. It accelerates the exit of commodity and impulsive categories where margins were already thin. For Big Food, this is a forcing function for portfolio clarity: Which categories have genuine ritual and health identity? Which are just calories?

Why GLP-1 Kills Junk, Concentrates Value: The ConsumomicsǺ Genome

Behavior = (P + E + C + A) × V

Factor	Low-Occasion Snacking (Pre-GLP-1)	Structured Protein Meal (On GLP-1)
P (Provisioning/Price)	4	7
E (Emotion & Identity)	7	7
C (Convenience & Cognitive Load)	7	6
A (Automaticity/Ritual)	4	7
V (Trust/Regulatory Genome)	1.5	2.5
Behavior Score	**(4+7+7+4) × 1.5 = 33**	**(7+7+6+7) × 2.5 = 67.5**

The Shift:

GLP-1 eliminates low-occasion snacking because it destroys A (Automaticity) – users aren't hungry between meals, so ritual collapses. The snack had high E (pleasure) and C (convenience), but low P and V. Without A to anchor it, the category evaporates.

GLP-1 users consolidate into fewer, higher-intention occasions where P (outcome per calorie) and V (proof the product delivers) dominate. Fairlife, Starbucks protein, structured breakfast SKUs win because they offer defensible nutrition claim (V) + ritual lock (A).

Implication: GLP-1 compresses frequency but concentrates margin toward brands with V2.5–3.0 and A7–9 ritual entrenchment.

Megatrend 2

"Ultra-Processed" Moves From Culture War to Regulatory Reality

Two years ago, "ultra-processed" was still a culture-war proxy. Today it's regulatory infrastructure.

California's AB 1264 (enacted Sept 2025) mandates that the state define and regulate ultra-processed foods in schools by 2032. Texas SB 25 (published Oct 2025) requires warning labels on products containing ingredients banned in Australia, Canada, EU, or UK. Wisconsin, Louisiana, Arizona, and Florida have similar proposals pending. The FDA has opened a public comment period on a uniform federal definition. This is no longer media hysteria; it's compliance planning.

The irony is that the insurgent playbook built almost entirely on "clean label / no X" claims is the most exposed. First-wave brands (Bobo, various DTC snacking) won shelf space and margin on story. They don't have:

- The lab infrastructure to run microbiome or metabolic studies
- The regulatory relationships to navigate state-by-state ingredient variance
- The margin to reformulate quickly if their hero ingredient gets red-flagged
- The retailer partnerships to defend on health scorecard systems

Big Food, conversely, has spent the last 18 months quietly building:

Nutrient metrics and clinical backing

(General Mills invested in gut health research; Nestlé expanded its nutrition institute partnerships),

Traceability systems

to defend ingredient provenance,

Retailer co-ops

on health scoring where they actually win (Starbucks' protein positioning, positioning, Fairlife's microfiltered milk claims), and

Patent and BITE-style R&D hubs

to prove what they sell.

What's changed in 2025

Clean label as a default marketing claim is losing power with retailers and regulators. The competitive edge now goes to brands that can prove their positions with data, not vibes. Insurgents living on "no X" claims without clinical backing are the first casualties of enforcement.

Why Clean Label Cracks, Big Food Holds: The Consumomics™ Genome

Behavior = (P + E + C + A) × V

Factor	Clean Label Insurgent (2023)	Science-Backed Big Food (2025)
P (Provisioning/Price)	6	7
E (Emotion & Identity)	7	6
C (Convenience & Cognitive Load)	6	8
A (Automaticity/Ritual)	4	7
V (Trust/Regulatory Genome)	1.9	2.7
Behavior Score	**(6+7+6+4) × 1.9 = 43.7**	**(7+6+8+7) × 2.7 = 75.6**

The Collapse:

Clean label insurgents built on high E (identity: "I'm choosing natural") and C (simple label = cognitive ease). But V (trust in claims) was always narrative-only: "no X" without proof. When regulators demanded evidence and retailers required health scorecards, V crashed to 1.8. Big Food holds because it has V (clinical studies, traceability, regulatory relationships) and A (shelf presence, household ritual). E is lower, but V × A locks the category.

Implication: When regulators move, narrative V fails immediately. Only science-backed V survives enforcement. Big Food's lab infrastructure, not insurgent story, becomes the moat.

Ultra-Processed Backlash: Trust Genome Comparison

Clean Label Insurgent (2023)

Built on high E (identity: "I'm choosing natural") and C (simple label = cognitive ease). But V (trust in claims) was always narrative-only: "no X" without proof.

Behavior Score: 43.7

- P: 6 | E: 7 | C: 6 | A: 4
- V: 1.9 (narrative trust only)

Science-Backed Big Food (2025)

Holds because it has V (clinical studies, traceability, regulatory relationships) and A (shelf presence, household ritual). E is lower, but V × A locks the category.

Behavior Score: 75.6

- P: 7 | E: 6 | C: 8 | A: 7
- V: 2.7 (evidence-based trust)

The Collapse:
When regulators demanded evidence and retailers required health scorecards, narrative V crashed to 1.8 for clean label insurgents. Big Food's lab infrastructure, not insurgent story, becomes the moat.

Implication: When regulators move, narrative V fails immediately. Only science-backed V survives enforcement. Ultra-processed panic is not the end of Big Food; it is the end of free Story-V. The winners are incumbents who treat V as an engineered asset.

Megatrend 3

Protein Is Still Growing. The Incumbent Is Winning.

Consumer interest in protein remains solid. ADM data and others confirm 60–70% of consumers actively seeking more protein. Soy remains strongly anchored to "muscle/active lifestyle" associations. The narrative consensus was that plant-based alternatives would own growth. The data shows otherwise.

The Plant-Based Reset:

Plant-based meat retail sales fell 7% to $1.2B in 2024 (units down 11%). More telling: funding into plant-based startups collapsed 64% in 2024 from $854M to $309M.

- Refrigerated plant-based burgers: 26% dollars, 34% units
- Frozen plant-based sausage: 17% dollars, 20% units
- Plant-based meatballs: 21% dollars, 25% units

Only exception: Real soy (tofu, tempeh, seitan) grew 6% in 2024 and now represents roughly one-third of plant-based protein pound sales.

The Beef & Conventional Protein Surge:

Meanwhile:

- Global beef market is growing 4.3% CAGR (2025–2034), with total market value forecast at $846B by 2034 $846B by 2034 (up from $579B in 2025)
- U.S. fresh beef retail sales up 9.7% dollar growth, with volume gains of 4.5% in 2024
- Conventional beef outperforming across all cuts and formats; consumer preference for taste and quality and quality over plant-based alternatives demonstrated in blind taste tests (40%+ preference for beef for beef patties, chicken filets, sausages vs. plant-based analogs)

The genome shift is real, but it's not alt gaining on incumbent, it's incumbent recapturing disaffected alt adopters.

Implication: The protein megatrend is alive. The winners are not narrative-driven insurgents but scaled players with stable supply chains and consistent quality. Big Ag and Big Food that double-down on conventional protein systems (beef, soy, dairy) will grow past alt brands that mistook a hype spike for structural demand. Plant-based startups that lived on "it's plant-based, so it's better" are the most exposed.

Why Beef Wins: The ConsumomicsẤ Genome

Behavior = (P + E + C + A) × V

Factor	Plant-Based (2024)	Conventional Beef
P (Provisioning/Price)	6	7
E (Emotion & Identity)	6	7
C (Convenience & Cognitive Load)	6	8
A (Automaticity/Ritual)	4	7
V (Trust/Regulatory Genome)	1.5	2.6
Behavior Score	**(6+6+6+4) × 1.5 = 33**	**(7+7+8+7) × 2.6 = 75.4**

The Collapse:
Plant-based rode high E and identity signal early. But V (trust in claims) collapsed when taste gaps emerged, environmental hype faced scrutiny, and ultra-processed backlash hit. Without V, none of the other factors matter.

Beef never lost V. It's a known quantity with 50+ years of safety data, ritual entrenchment (A=9), and no claim burden. When consumers simplified, beef won.

Implication: Insurgents die when V cracks. Incumbents survive because V is their moat.

Retailer Brands Are Now Market Leaders

For a decade, "insurgent brand" meant founder-led, millennial-friendly, DTC-first, beautiful packaging. In 2025, the most important insurgents – in terms of sales growth, margin capture, and category innovation – are retailer-owned platforms.

The Scale: Kirkland Signature (Costco) now generates $86B in annual sales, or roughly one-third of Costco's total revenue. By comparison, Kroger's entire private label portfolio brought in $32B (25% of sales). Costco's private label gross margin is 12.61% vs. <10% industry average.

Across Europe, private label now accounts for 39.1% of total grocery sales value (up from 38% in 2023). Retailers with above-average private label share are 2.8x more likely to gain market share than peers. Those with top-quartile quality are 1.6x more likely to gain share.

The Retailer Playbook:

Traders Joe's, Whole Foods 365, Aldi, Costco, and others are:

- Curating tight assortments (removing clutter)
- Building private label as a distinct brand with individual identity, not just a cost play (Sainsbury's "Taste the Difference," Morrisons' "The Best")
- Reserving prime shelf and promotional support for SKUs that fit their private label DNA
- Using private label to negotiate fiercely with CPG suppliers on price and innovation

Why it's Reshaping the Market:

Traditional branded CPG players are in a margin squeeze. Private labels offer quality *and* 20% price advantage over nationals, while retailers pocket 15%+ margins – double national brand margins. Retailers brand margins. Retailers control the shelf, and they're rapidly moving display and RMN oxygen toward private brands that drive loyalty and margin.

Implication: The insurgent-vs-Big Food dynamic is obsolete. The real competition is platform-vs-non-platform. Private label retailers with V3-level trust (Costco, Trader Joe's, Whole Foods) are the new category shapers. CPG brands that can't plug into these systems – or don't meet retailer margin/quality bar – are losing shelf space. Small insurgents without retailer distribution are the most vulnerable.

The Long Tail Shrinks - Shelf Resets Favor Strong Genomes

The 2010s and early 2020s generated an explosion of niche brands, clean-label insurgents, and SKU proliferation. Retailers tolerated massive assortments because capital was cheap, supply chains were loose, and shelf space was not a scarce asset.

That era is ending. Retailers face tighter working capital, labor constraints, and RMN costs. More importantly: they now have velocity and lifetime-value data that makes clarity unavoidable. Every SKU has a digital footprint. Buyers can see in real time which products drive repeat purchase, and which sit as shelf fillers.

The result is a structural reset happening now:

- Retailers are consolidating assortments, removing 10–20% of SKUs per category
- V-risk (trust risk) categories are being reclaimed by brands with regulatory relationships and traceability
- Once-a-year curios are being delisted in favor of ritual SKUs that have A (automatic) 8–9 household penetration

The Visible Casualties:

Small brands that won distribution on "clean label / no X" claims without underlying functional proof are the first to lose shelf space. They lack the retailer partnerships to defend, the margin to reformulate if regulatory status changes, and the repeat-purchase velocity to justify space in a consolidated set.

The Winners:

Big Food and Big Ag platforms that offer:

- Defensible functional claims (nutrient systems, microbiome support, meal rituals)
- Regulatory compliance at scale
- Margin contribution to retailer (8%+ net margin vs. low-single-digit insurgents)
- Private label retailers (who own the shelf directly)

Implication: 2025 is the inflection point you've predicted: the start of the Big Food and private label recapture era. This isn't volume recovery; it's share consolidation. Shelf resets are moving against the long tail of label-driven insurgents and toward incumbents with genome advantage. The insurgent era isn't ending, it's being ruthlessly sorted into "has big-box distribution" and "does not.

Why Shelf Resets Favor Big Food & Private Label: The Consumomics™ Genome

Behavior = (P + E + C + A) × V

Factor	Plant-Based (2024)	Conventional Beef
P (Provisioning/Price)	5	8
E (Emotion & Identity)	7	5
C (Convenience & Cognitive Load)	5	8
A (Automaticity/Ritual)	3	8
V (Trust/Regulatory Genome)	1.5	2.7
Behavior Score	**(5+7+5+3) × 1.5 = 30**	**(8+5+8+8) × 2.7 = 78.3**

The Consolidation:
Long-tail insurgents have high E (beautiful packaging, founder story, Instagram-bait novelty). But they collapse on A (no household ritual, inconsistent distribution) and V (no regulatory infrastructure, claims unsupported by science).

When retailers tighten assortments and demand LTV velocity, low-A, low-V SKUs are first to delist. Big Food and retailer platforms dominate because they have both A (ritual entrenchment) and V (compliance, traceability, scale).

Implication: Shelf resets are genome-based culls. Brands without A7–9 ritual and V2.5–3.0 trust lose space. The long tail doesn't disappear, it gets sorted into "has distribution" and "doesn't."

From Interesting Trends to an Operating System

These five megatrends – GLP-1, ultra-processed backlash, protein reset, private label platforms, and insurgent fatigue are not random or independent.

Through the ConsumomicsTMÅ lens, they are:

- Movements in **PECA-V** at consumer and category level
- Shifts in **which genomes** growth and margin now come from
- Signals that **Big Food, Big Ag, and major retailers** are structurally better positioned than many insurgents – if they use their scale

FutureBridge uses this to:

- Score categories and brands in **PECA-V and U**
- Identify **Genome-Advantaged Assets**TM for M&A and value creation
- Design **Fast-Moving Platforms**TM and **SKU Genome Architectures**TM that match real phenotypes
- Build Organizational HelixTM structures so genome work doesn't live in one-off decks

FutureBridge | Partnering on Genome-Advantaged Strategy

FutureBridge works with:

- Global CPG and retail leaders,
- Farmer cooperatives and processors,
- PE / sovereign investors

to turn Consumomics™ into:

- Actionable scorecards (PECA-V, V-state, U-variable),
- Category and platform strategies,
- Organizational builds (Office of the Consumer Genome™ + Office of the Food Genome™),
- M&A playbooks that underwrite **demand systems**, not just brands.

Megatrend 1

GLP-1 Compresses Junk, Concentrates Value

GLP-1 and Food-as-Medicine: Less Grazing, More “Intentional” Eating

GLP-1 usage is rising fast in North America and Europe. The headline fear is simple:

- Fewer calories consumed,
- Pressure on QSR, snacks, soda, and impulse impulse categories,
- “Shrinking stomach equals shrinking TAM.”

But early behavior suggests something more nuanced:

- GLP-1 reduces **unplanned, low-value eating eating occasions** (late-night snacking, casual casual grazing).
- It **intensifies focus** on a smaller number of **nutrient-dense, protein-rich, and metabolically coherent meals and snacks**.
- Retailers and chains are already seeing a new class class of **“intentional shoppers”** who care less about less about volume and more about **outcomes outcomes** (weight, labs, sleep, energy).

Rather than a pure volume shock, GLP-1 is acting like a **filter**: culling weak genomes and making strong ones more valuable.

What GLP-1 Actually Changes in PECA-V

Pre-GLP-1 Shopper

In **Consumomics™**, demand is:

Behavior = (P + E + C + A) × V

For a pre-GLP-1 "average" shopper in a Western market:

- **P**: 8 – price pressure / stretch paycheck
- **E**: 4 – "I know I should eat better, but…"
- **C**: 7 – convenience drives most choices
- **A**: 5 – lots of habits, but many are weak or conflicted
- **V**: 1.8 – low trust that the system is actually making them healthier

Behavior ≈ (8 + 4 + 7 + 5) × 1.8 = 24 × 1.8 ≈ 43

GLP-1 Health Optimizer / "metabolic patient"

For a GLP-1 Health Optimizer / "metabolic patient":

- **P**: 6 – willing to pay more for fewer, higher-quality occasions
- **E**: 7 – identity shifts to "I am fixing my health"
- **C**: 6 – still wants convenience but not at the expense of outcomes
- **A**: 7 – new, more disciplined rituals form (protein breakfast, structured dinner, dinner, controlled snacks)
- **V**: 2.5 – trust moves toward science-anchored brands and pharmacy-linked linked programs

Behavior ≈ (6 + 7 + 6 + 7) × 2.5 = 26 × 2.5 ≈ 65

Net outcome:

- **Fewer total occasions**,
- **higher PECA-V per remaining occasion**,
- more demand for **evidence-based V** and robust A-rituals,
- less tolerance for "empty" P/E plays (cheap, tasty, no outcomes).

Turning GLP-1 Into a Platform for Big Food and Big Retail

For Big Food, Big Ag, and retailers, this megatrend is an opportunity to **concentrate value**, not just manage decline.

Own the GLP-1 breakfast and evening meal:

Design SKUs and platforms where **protein, fiber, micronutrients, and satiety** are clear, are clear, and tie them to pharmacy / clinic programs. GLP-1 shoppers will pay for **A-** pay for **A-rituals** that deliver reliable outcomes.

Link V to measurement, not marketing:

Move product narratives from “better-for-you” to “clinically anchored” or “lab-validated” where possible. Integrate **FoodHealth scores, lab markers, and wearable data** into how products are presented and evaluated.

Reduce SKU clutter; amplify genome-strong platforms:

Rationalize “BFY” SKUs with shallow V and no A. Consolidate behind fewer platforms with strong PECA-V and GLP-1-compatible rituals.

Build grocery + pharmacy ecosystems:

Create **Office of the Consumer Genome™** led programs where dieticians, pharmacists, and category teams see the same PECA-V picture and align assortments, promos, and clinical guidance.

GLP-1 will hurt brands whose genomes were weak all along. It will **reward incumbents** that have the capital and data to build verified, ritual-worthy platforms.

Megatrend 2

Ultra-Processed Panic Splits Trust

Ultra-Processed Debate: The End of Free “Clean” V

Ultra-processed foods are under fire:

- Governments exploring labels and taxes,
- Media linking UPF to obesity, depression, and chronic disease,
- Consumers using “ultra-processed” as a catch-all for “I don’t trust this.”

The default industry response has been:

- “Clean label”
- “Natural”
- “No preservatives / no X / no Y”
- “Minimally processed”

That bought insurgents and some majors **narrative V** for a decade. In 2025, the bar is moving:

→ Regulators and retailers want evidence

→ Consumers are more label-literate

→ The line “we’re not them” doesn’t carry the same weight same weight

» The key shift:

Trust is no longer “processed vs not.” It’s **science-backed vs story-backed**.

Science-V vs Story-V: Two Different Genomes

Three simplified genomes in this debate:

1

Legacy UPF brand
(pre-backlash):

- P 8 – cheap, promotions;
- E 3 – familiar, some nostalgia;
- C 9 – always available, easy to prep;
- A 7 – very habitual;
- V 1.5 – people know it's not great, but accept it.

2

Clean label" insurgent:

- P 6 – a bit more expensive;
- E 7 – strong identity and virtue signalling;
- C 5 – often more steps, more cost;
- A 3 – trial and episodic use;
- V 2.0 – higher perceived trust, but mostly narrative.

3

Science-V incumbent
(what Big Food can build):

- P 7 – justified premium vs legacy;
- E 6 – credible but not over-the-top;
- C 7 – convenient formats;
- A 7 – engineered rituals;
- V 2.7 – trust backed by trials, nutrient metrics, metrics, traceability.

In a world of rising scrutiny:

- UPF brands with **no V-repair** risk C&E sustaining behavior only until policy and consumer pushback spike.
- "Clean" brands with **Story-V only** risk abrupt V-Crack if claims are shown to be thin or inconsistent.
- Incumbents who build **Science-V** can move into **V-Lock** and justify both their E and P.

From “Less Bad” to “Provably Better”

For Big Food and Big Ag:

- **Invest in V-factories:** R&D hubs (like Barilla BITE), nutrient density scoring, digestibility studies, microbiome/metabolic trials, and traceability aren’t optional. They are **the new V infrastructure**.
- **Refuse to compete on label alone:** Let small brands fight over “clean” language. Position your innovations around **measurable outcomes** and **transparent supply chains**.
- **Partner with retailers on health scoring:** Lean into tools like FoodHealth Score but then layer **PECA-V and phenotypes** on top, so your **science-V products** are easy to find and ritualize.
- **Audit your own Story-V:** Identify SKUs where you are still using “natural/clean” narratives without strong proof. Either upgrade them to Science-V or treat them as short-lived.

Ultra-processed panic is not the end of Big Food; it is the end of **free Story-V**. The winners are incumbents who treat V as an engineered asset.

Megatrend 3

Protein Reset: High-V Protein Wins

Protein Is Still Hot. It’s Just Not a Free Call Option for Alt Brands Anymore.

Data from ADM, Nielsen, and others all say the same thing:

- 60–70% of consumers want more protein, protein,
- Soy and other plant proteins still test well well on “muscle support” and “active “active lifestyle,”
- Younger cohorts are open to fermentation fermentation and novel proteins.

The mistake of the last decade:

- Equating “more protein demand” with “plant-based will replace meat,”
- Ignoring V and A in the process.

What we see now:

- Alt burgers and nuggets that leaned on on **fear-based V** (meat = bad) and **novelty E novelty E** have stalled;
- Premium poultry, eggs, dairy, soy, and pulses with credible V (NAE, pasture-raised, raised, nutrient-dense, traceable) are growing both volume and pricing.

» Protein isn’t the fad. **Ignoring the genome is.**

Commodity vs Alt vs Premium: Three Protein Genomes

1

Commodity meat:

- P 8 – aggressive pricing;
- E 3 – some tradition, but little lifestyle identity;
- C 7 – ubiquitous;
- A 6 – frequent use;
- V 1.6 – trust eroded by mixed messaging, scandals.

2

First-wave alt burger:

- P 6 – noticeable premium;
- E 7 – progressive, “future of food”;
- C 6 – easy enough to use;
- A 3–4 – some “Meatless Mondays”, low daily use;
- V 2.2 → 1.3 – initial belief, then erosion as “ultra-processed” concerns hit.

3

Premium animal/soy with Science-V:

- P 7 – premium vs commodity but framed around around nutrient density and welfare;
- E 7 – identity (“I’m someone who cares how this how this animal lived / what this does for my body”);
- C 7 – good distribution and formats;
- A 7 – weekly rituals (breakfast eggs, regular poultry poultry dinners, protein shakes);
- V 2.7 – backed by sourcing, audits, and data.

Implication: Protein dollars will migrate toward **high-V, high-PECA** systems. Big Food & Big Ag are structurally better positioned to run those at scale than small alt scale than small alt brands.

Rebalance the Protein Portfolio around Genome-Advantaged Assets

For Big Ag & CPG:

Identify your Genome-Advantaged Proteins

Score meat, dairy, soy, pulses, and alt protein portfolios in **PECA-V and U**. **V and U**. Double-down on systems with real trust, ritual, and headroom; headroom; stop subsidising assets that survive only on narrative.

Design cross-category protein platforms

Move from isolated products (burger, yogurt, bar) to **Fast-Moving Platforms™** that run through breakfast, snacks, and dinner for Fitness Enthusiasts, Health Optimizers, and Family Meal Planners.

Invest where you can build V at source

Use your scale in feed, genetics, agronomy, and traceability to show regulators and consumers why your protein is **measurably better** across health and climate.

Acquisition discipline

In M&A, pay up for **protein systems with strong genomes** (high V, high A, high U). Be ruthless about alt-protein deals that look clever but sit on fragile V and thin A.

The market is resetting. Protein is still central. The advantage goes to incumbents who know which genomes they actually own.

Megatrend 4

Private Label as V3 Platform

Retailer Brands Are Now Trust Platforms, Not Just Value Plays

No Longer Just:

Kirkland, 365, Trader Joe's, Aldi, and other other retail brands are no longer:

- "Just cheaper," or
- "Me-too options" below national brands

They Have Become:

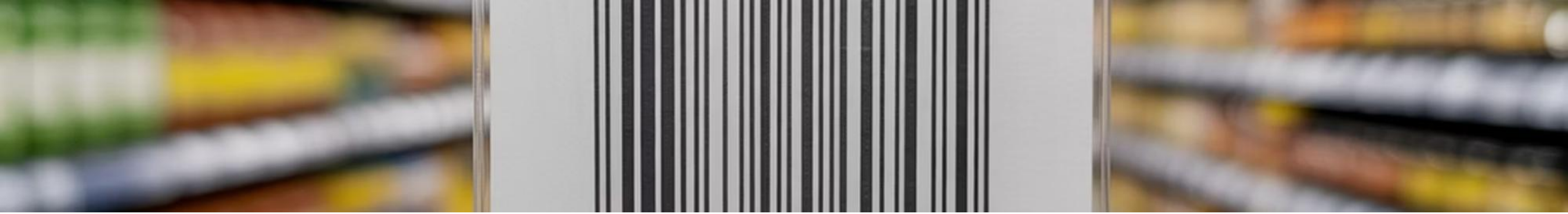
Platforms:

- Consistent standards
- Curated innovation
- Integrated into memberships, apps, and rituals (weekly stock-up, stock-up, seasonal discoveries)

For many households, retailer brands now *define* the grocery experience.

The key shift in 2025:

- Retailers are using private labels to **own V and A**
- Are increasingly selective about which national brands they allow to share that space



What a V3 Private Label Genome Looks Like

Typical long-tail BFY insurgent:

- P 6 – modest premium vs commodity;
- E 7 – strong story, founder, or niche;
- C 5 – limited distribution, effort to find;
- A 3 – trial, some loyalty, little ritual;
- V 2.0 – narrative trust.

Retailer platform (in core zones):

- P 8 – strong perceived value;
- E 6 – “I’m smart for buying this,” sometimes status;
- C 7 – always visible, easy to buy;
- A 8 – weekly rituals (“we always buy X at Costco / Aldi / TJ’s”);
- V 3.0 – “If they stock it under their name, it’s good.”

As retailers tighten space and capital:

- They **promote their own V3 genomes**,
- They demand that national brands plug into those genomes (shared standards, RMN campaigns, price/pack architectures),
- They quietly reduce exposure to SKUs that don’t fit.

National Brands: Plug into the Platform or Get Squeezed

For Big Food:

- **Treat retailer platforms as partners, not threats.** Align innovation, pack, and price architectures with **Kirkland/365/Aldi phenotypes** rather than fighting them. Leverage retail V + A to scale your own genomes
- **Present your genome clearly.** Show retailers your **PECA-V and U** case: where your brand adds V or A the platform doesn't yet have, and how it lifts baskets and LTV
- **Be ruthless about SKUs that don't fit.** Kill or D2C-push SKUs that only exist because a buyer gave you a slot five years ago. Retailers won't carry that zombie inventory forever

For retailers:

- Continue to **invest in platform V** (standards, traceability, smart curation)
- Use Consumomics™ to decide which categories you can fully own vs where national brands are needed to complete the genome

Megatrend 5

Insurgent Fatigue & Shelf Reset

Reset

Ten Years of Insurgent Proliferation Meet a Hard Stop

The 2010s and early 2020s saw

- An explosion of venture-backed BFY, “clean,” and niche niche brands
- Shelves overflowing with overlapping propositions
- Retailers and CPGs using “insurgents” as proof of innovation innovation and a hedge against disruption

By 2025

- Capital is more expensive
- Labour and working capital are constrained
- RMNs and loyalty data make it obvious which SKUs drive trips and which don’t
- Food safety scares and UPF debates raise **V-risk** tolerance

Retailers and brand owners are quietly shifting from **breadth to depth.**

How Buyers Are (Consciously or Not) Using PECA-V

Even if they don't use our language, buyers are starting to sort SKUs by genome:

Keep / grow

- **V-Lock or V-Obsession brands** (V ≥ 2.3) with strong A8–9 rituals (e.g., Starbucks, Fairlife, Costco, key cereals, some pet brands).
- **Private labels** with V3 and A8–9 in platform roles.

Watch / prune

- **V-Foundation brands** (V ~2.0) with decent A, some U left.
- A mix of national and insurgent players players where PECA is okay but not spectacular.

Cull

- **V-Crack brands** (V 1.3–1.7) leaning on heavy promotions.
- Insurgents with E spikes but A ≤ 3 (no rituals) and narrative V only.
- Long-tail SKUs that add complexity, not behavior.

In PECA-V terms, retailers are shifting space and promotional support toward **Genome-Advantaged Assets™** and away from "interesting" from "interesting" but structurally weak brands.

Big Food: Use the Reset to Rebuild the Portfolio Around Genomes

For Big Food & Big Ag:

Score your portfolio honestly. Use PECA-V + U to classify brands into:

- Genome leaders (protect & extend),
- Genome fixer-uppers (V-repair, A-design),
- Genome laggards (harvest or exit).

Lean into the reset with buyers. Show retail partners a **joint genome plan**: which **plan**: which brands you'll strengthen, which SKUs you'll kill, and how that will that will simplify the aisle while lifting LTV.

Play offense in M&A. Target **insurgents with real genomes** (strong V, emerging rituals, U left) at better prices; avoid those whose only asset was a label trend that's now fading.

For insurgents:

The playbook is harder, but clear:

- Either prove you have a real genome (PECA-V + U + A that a platform or Big platform or Big Food can't replicate easily),
- Or be prepared to sell into a larger system and let your idea scale there. there.

2025 isn't the end of insurgent innovation. It's the end of the assumption that **label + velocity = destiny**. From here on, shelf space and capital space and capital increasingly follow **the genome**.

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Schedule a meeting

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