



# THE EVOLVING INDUSTRY LANDSCAPE IN PERSONALIZED NUTRITION

Mariette Abrahams CEO & Founder of Qina

Qina™

<https://qina.tech>

**Qina™**

**NO FINANCIAL DISCLOSURE  
OR CONFLICT OF INTEREST  
TO DECLARE**

**Qina is the creator and full owner of the  
platform available on subscription**





# WHERE WE STARTED

LIMITED  
SCIENTIFIC  
EVIDENCE

Impact on personalized  
nutrition advice beyond  
medical nutrition

NICHE  
MARKET WITH  
A FEW  
PLAYERS

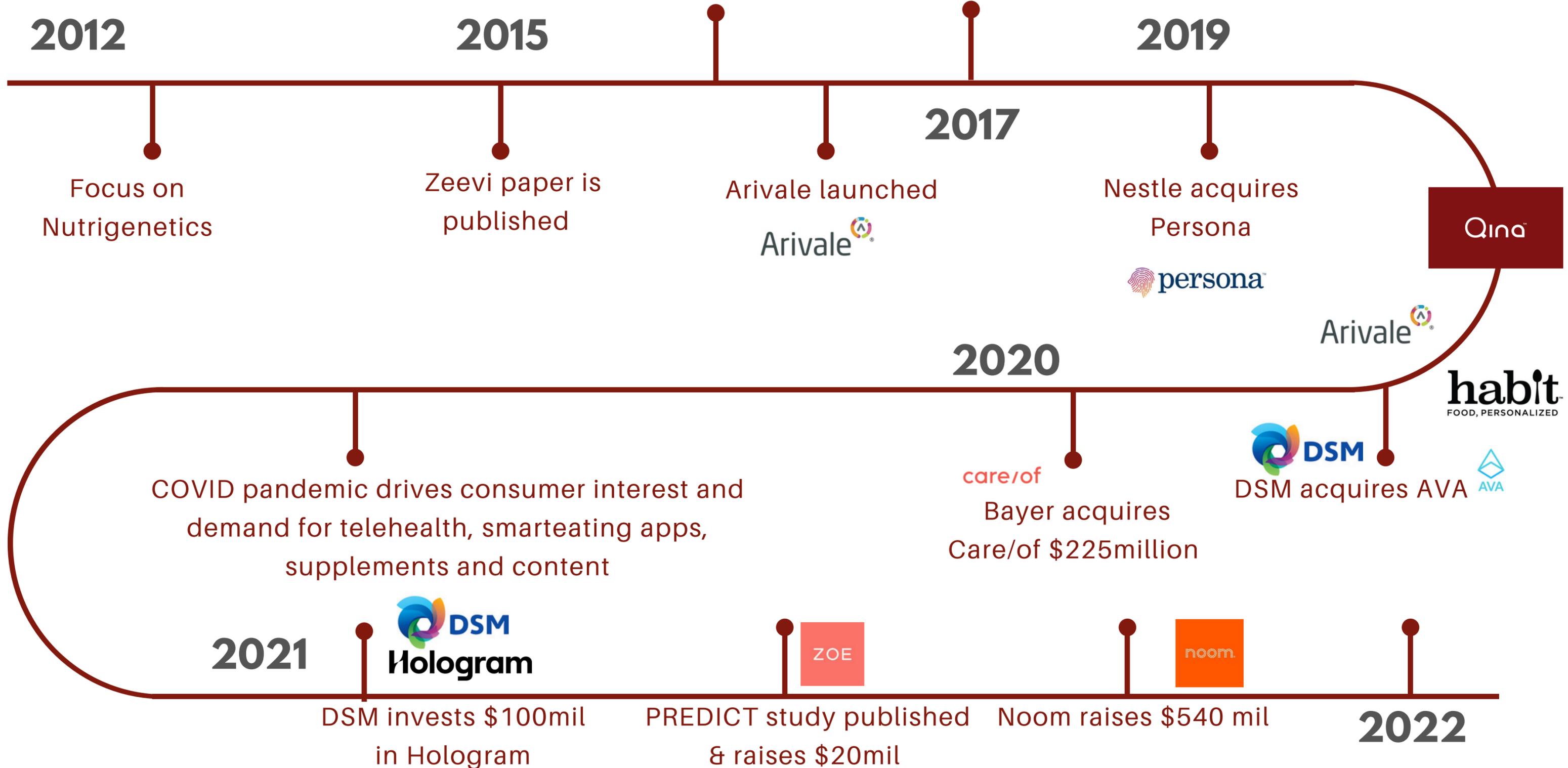
Aimed at the worried  
well who could afford  
solutions

EARLY  
ADOPTERS  
TENDED TO BE  
FEMALE,  
EDUCATED  
WITH HIGH  
DISPOSABLE  
INCOME

BEHAVIOUR  
CHANGE WAS  
AN  
AFTERTHOUGHT

# Market movements

Qina™





# PERSONALIZED NUTRITION

WHERE WE ARE NOW

**Blood testing**

**Microbiome testing**

**DNA testing**

**Epigenetics**

**AI/ Systems approach**

**Blockchain**

**AI/ Functional Systems approach**

**Food & Nutrition**

**Nutritional Supplements**

**Smart Plates & Devices**

**Behaviour & Lifestyle**

**Retailers**

**Health & Wellness**

**Supplements & Devices**

**Smart Plates & Devices**

**Qina**



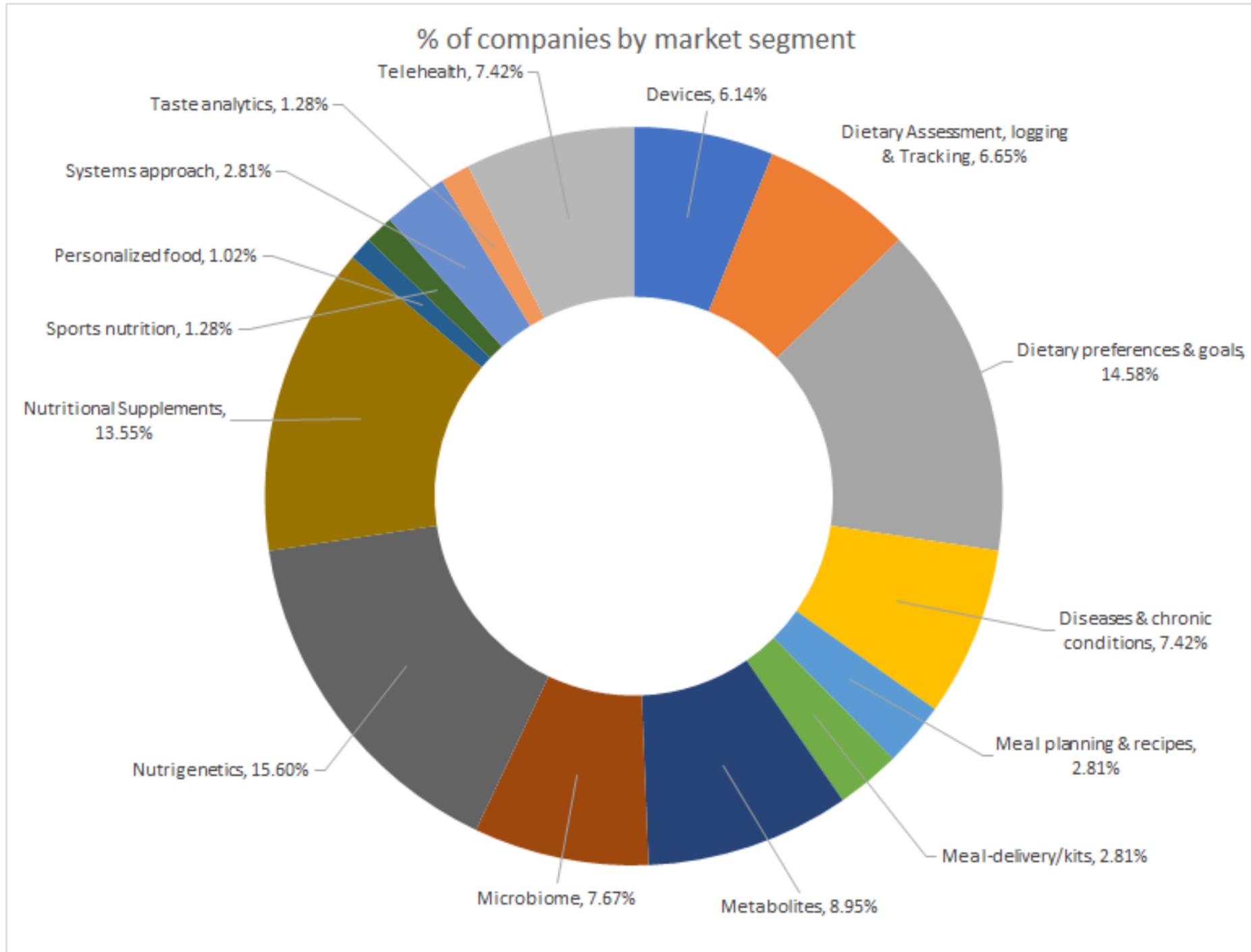
# THE QINA PLATFORM

**The first curated database in Personalized nutrition. We make navigating and understanding the industry easy.**

Search by:

- Segment
- Technology
- Company
- Keyword

# Breakdown of the market by segment



**2014 - 2021**

↑ **17% Nutritional supplements**

↑ **80% Microbiome**

↑ **54% Dietary preferences**

↑ **54% Devices**



## PREFERENCES

Increased awareness in nutrition and health have spurred on the growth of solutions based on dietary preferences, health goals, taste, values and budget



## BEHAVIOUR CHANGE

Research demonstrates that different BCT's work for different individuals and are increasingly incorporated into new solutions



## ADDITION OF SERVICES

New service improve consumer experience and provide human interaction to enable behaviour change either in app or in-person



## WIDER ADOPTION

While younger consumers are more interested in prevention and optimization, older consumers are interested in managing and treating symptoms



**More strategic  
partnerships**

**More demand for  
transparency &  
scientific support**

**Data drives  
hyper-  
personalization**



# Key trends

**SCIENTIFIC  
ADVANCES  
DRIVE  
DEVELOPMENT  
OF NEW  
SOLUTIONS**

INDIVIDUAL CARDIOMETABOLIC  
RESPONSES TO FOOD ARE DRIVEN  
LARGELY BY MICROBIOME  
COMPOSITION

Berry et al 2021

THE MICROBIOME IS A KEY  
DETERMINANT FOR HEALTHY AGING

Wilshanski et al 2021

HYBRID APPROACHES TO  
PERSONALIZED NUTRITION HAVE  
SUPERIOR OUTCOMES

Rollo et al 2020

## NEW ENTRANTS

New solutions are used as part of consumer health solutions



## WIDER APPLICATIONS

Cardiometabolic health is going mainstream.



## DEMAND FOR NEW BREED OF EXPERTS

Who can understand the science, new technologies and personalize offering to support behaviour change

**WHERE ARE  
WE GOING?**



## FOOD AS MEDICINE/ FOOD FOR OPTIMAL HEALTH MOVEMENT

Increasingly new solutions are closing the gap between food to prevent and treat conditions with integrated food shopping lists, meal plans education and support



Qina™

**HyVee®**

## RETAILERS PLAY A BIGGER ROLE IN HEALTH

Especially since COVID, retailers are playing an increasingly important role to provide access to affordable healthy food, education on healthy options, in-store guidance, personalized rewards and wellness services.



## PEOPLE AND PLANET

Sustainability is a growing priority for many consumers. As a sustainable way of eating is predominantly plant-based, more consumers are including values as part of their food choices.



## REGULATION TIGHTENS UP TO INCLUDE SOFTWARE

As regulators catch up with digital tools, new regulations are keeping consumers safe. Starting with GDPR in 2018, new regulations are clamping down on solutions that are producing and advising consumers on their health ie software.



A thick, dark red vertical bar on the left side of the slide, with thin red lines extending above and below it.

# HOW DO WE ENSURE EQUITABLE ACCESS?

IMPROVING HEALTH FOR ALL



## **EQUITY BY DESIGN**

Build in levels of personalization starting with nutrition education and UN SDG



## **KEEP IT RELEVANT**

Ensure that the right solutions meet the goals and needs of the relevant people. Better collaboration between industry and academia to drive research.



## **REIMBURSE FOR HEALTH**

Reimburse solutions that are evidence-based with proven health outcomes.

The Personalized nutrition market is very dynamic, growing and increasingly tipping towards mainstream with scientific advances supporting its merit. However, more should and can be done to conduct inclusive research and provide equitable access.





**Driven by science, inspired by health**



**CONTACT**

Mariette Abrahams CEO & Founder  
Book a demo at [qina.tech](https://qina.tech)