



NUTRINEEDS



PESTLE Analysis

PESTLE Analysis for Meal Planning

Team 1 - Innovation Processes & Tools (Spring 2024)



Patrick
Scanlan



Allan
Gulley



Chloe
Jian



Zack
Jessell

Overview

This resource provides a detailed PESTLE analysis for the meal planning and meal preparation market in the United States.

Assumptions

- many people have unique and specific dietary needs informed by health or lifestyle factors
- our company will focus on a subset of people who have specific dietary restrictions
- our company will operate under a business-to-consumer model
- our company will begin operations in specific city and state in the eastern U.S.
- we will focus on trends in a post-COVID-19 era

	Timescales			
	-5 years (Pre-COVID-19)	Last 12 months	Next 12 Months	+ 2 Years
	Top meal prep companies are acquired by large corporations. (Amazon > Whole Foods ; Albertsons > Plated ; Kroger > Home Chef)		Large corporations with influence are expected to continue investing in and acquiring meal prep businesses	Food certification distinction is expected to continue increasing due to consumer demand
	Revenue for Meal Plan kit companies in 2018: \$5.09B USD	Revenue for Meal Plan kit companies in 2023: \$12.99B USD	Impact of rising food costs and decreased consumer spending will dictate the economics of the meal kit delivery industry	Projected revenue for Meal Plan kit companies: \$19.52B USD
	Of the 17% of American consumers that have tried a meal planning or meal kit service, 90% have referred others to the service.		Meal prep services are trying to expand their distribution so that they can reach more people in rural areas; currently, 25% of people in urban areas have tried a meal prep service compared to only 14% in rural areas	
	Connectivity and Convince shape the meal kit industry	Data and Analytics is used heavily in this industry to better understand customer data and trends as well as for inventory management and supply chain.		Advancements in AI/ML shape the future for the meal kit industry
	Meal prep services are subject to FDA HACCP regulation to ensure food safety through all phases of preparation for consumption		Adopting additional best practices for food safety may be an overall win for consumer trust and support but will increase costs up front	Legal industry functioning normally FDA increasing capacity for food tracking to support better food safety
	Majority of US shoppers physically travel to grocery stores using their personal vehicle (62.4%), resulting in a significant amount of carbon emission from grocery trips.	Online grocery continuously increasing, leading to less travel time for grocery trips and more effective delivery thus less carbon emission (e.g. for 2020 online grocery sales jumped 103% year-over-year)	Food waste is estimated to be as much as 40% of the whole food supply	Major meal planning companies are exploring the options to reduce packaging and usage of plastic; however, switching to recyclable material could greatly increase cost.
Effect on profit	-	+/-	+	++

Political Factors

Several popular meal preparation or meal kit businesses have been acquired by large food corporations, in alignment with the growing popularity of delivered meal services.

Customers are increasingly seeking out food product certifications such as USDA Organic, Non-GMO Project, and Fair Trade.

Cost and effort for obtaining additional desirable food certifications is variable and complex due to the current regulatory requirements.

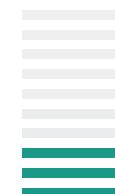
41%

Of consumers say they are more likely to buy USDA Organic products.



36%

Of consumers say they are more likely to buy non-GMO products.

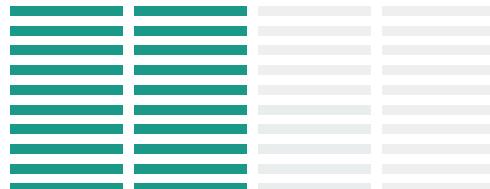


Economic Factors

Year	2018	2023	2028
Revenue	\$5.09B	\$12.99B	\$19.52B*

50.4%

Projected Market
Growth by 2028*



The meal planning or meal kit industry is highly competitive, with companies like HelloFresh, Blue Apron, Sun Basket, and Home Chef being the largest providers.

Pricing for meal planning kits in the industry is broken down into different models such as subscription plans, pay as you go, or customizable options. Cost to the customer typically depends on the number of kits ordered and delivery frequency, and payment methods are most often digital.

Cost structures for the industry depend primarily on ingredients, packaging, labor, delivery, technology, and marketing. Inflation of food costs is a major factor for companies in this industry to manage.

Socio-Demographic Factors

17% of U.S. consumers have used a meal planning or kit service, with younger generations leading adoption.*

Age Range:	28 - 43	44 - 59	60+
Adoption Rate:	29%	26%	12%

23% of Men have used a meal planning or kit service, compared to 15% for Women.

In urban areas, 25% people have tried these services compared to 14% in rural areas.*

Millions of Americans also suffer from the following conditions which have strict dietary requirements.

Disease:	Diabetes *	Kidney *	Celiac *
Dietary Restrictions:	✓	✓	✓
People Affected:	38.4 million	37 million	4.3 million
% of Population:	~9%	~8%	~1%

All of these conditions become more prevalent with age.

Black and Hispanic people are more likely to have diabetes or kidney disease than White or Asian people, while White people are more likely to have celiac disease.

On average, people in rural areas are more likely to have diabetes or kidney disease than people in urban areas.

Technological Factors

Technology has made meal planning kits easy and convenient. Many companies in this industry have web-based and/or mobile applications that can be used to plan, select, and track meal kits from a company's warehouse to the customer's home.

Data and analytics are used heavily in this industry to better understand customer preferences and trends as well as for inventory management and supply chain operations. Companies like Hello Fresh are also experimenting with Artificial Intelligence and Machine Learning models to support its core data use cases.*

Across the industry, logistics operations are backed by advanced packaging technologies that ensure freshness and safety. Many companies also utilize partnerships with last-mile delivery services to optimize transportation efficiency.





Legal Factors

In the U.S., all meal prep businesses must complete a Hazard Analysis Critical Control Point (HACCP) in accordance with FDA regulations. This process is resource intensive but ensures food safety through a systematic analysis of risk.

Acquisitions and mergers between large and small food businesses are highly investigated and sometimes denied by the U.S. Department of Justice and the Federal Trade Commission (FTC).

The U.S. FDA is actively increasing capacity and requirements for food traceability and incentivizing the adoption of this capability. While not required now, early adoption could be advantageous as traceability becomes normal and widely adopted.

100%

Of meal prep businesses in the United States complete an FDA HACCP.



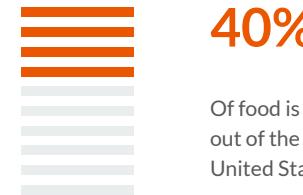
Technology is increasingly used to support food safety and regulatory compliance.

Environmental Factors

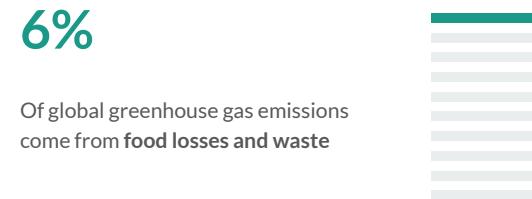
62.4% of American shoppers relied on **physical trips to grocery stores using their personal vehicles**, for multiple times per week, reducing in a significant amount of carbon emissions.

Online grocery shopping jumped since the pandemic (103% in 2020), leading to a great **increase in effectiveness of grocery delivery** and **less carbon emissions** from grocery shopping.

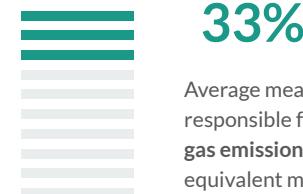
Meal planning services provide healthy meal options tailored to individual preference and dietary needs, gradually **changing people's lifestyle** and **reducing carbon footprint** from food consumption.



Of food is estimated to be wasted out of the whole food supply in the United States



Of global greenhouse gas emissions come from **food losses and waste**



Average meals sources from stores are responsible for **33% more greenhouse gas emissions** compared to the equivalent meals from meal kit services

Product Focus

Our team would like to focus on building a meal kit service targeted towards people with dietary restrictions attributed to **Diabetes, Kidney Disease, and Celiac disease**.

Despite the fact that this group represents nearly a quarter of the U.S. population, there are limited meal kit services that cater specifically to their conditions and meal preparation needs.

Initial Questions for UX Research

1. What are the main features customers value in a general meal kit service?
2. What are the pain points customers face with existing products?
3. What do we need to do in order to fill those opportunity gaps?
4. How willing are customers to share personal data or information that can inform meal plans?
5. What are the most common considerations that stop consumers from subscribing to meal plans?
6. How do we expect customer behavior to change in the next 10 years?
7. What are the major consumer trends influencing this space?
8. How might AI affect this space and consumer expectations?
9. What challenges do people face when preparing meals that must adhere to a doctor-recommended diet?
10. What features would be most helpful in a meal prep service specifically designed for medical diets?
11. What types of medical diets do you currently follow?
12. What is your ideal budget for a weekly meal prep service?
13. Who else in your household, if any, would be using this service with you?
14. What are your preferred methods for receiving and storing your meals?
15. What motivates someone to try a meal prep service?
16. How do people with medical conditions meal prep today?
17. Do people enjoy grocery shopping for their meals, rather than having a kit delivered?
18. Do people with medical conditions have help preparing meals?
19. How might costs affect someone's decision making?
20. Who do people with conditions go to for dietary advice?



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Value Opportunity Analysis

Value Opportunity Analysis for Meal Planning



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Effect on profit	-	+/-	+	++



NutriNeeds

A meal planning and prep service that is built for people with dietary restrictions attributed to diabetes, kidney disease, and celiac disease. We're focused on optimizing our products for high-quality, locally-sourced ingredients, while prioritizing a low-friction, modern UX

Problem Statement

How can we optimize nutrition for people with chronic diseases?

Opportunity Gap

A custom meal preparatory solution that optimizes for physician-approved dietary plans & restrictions



VOA | *Current* State of the Meal Prep Market

High

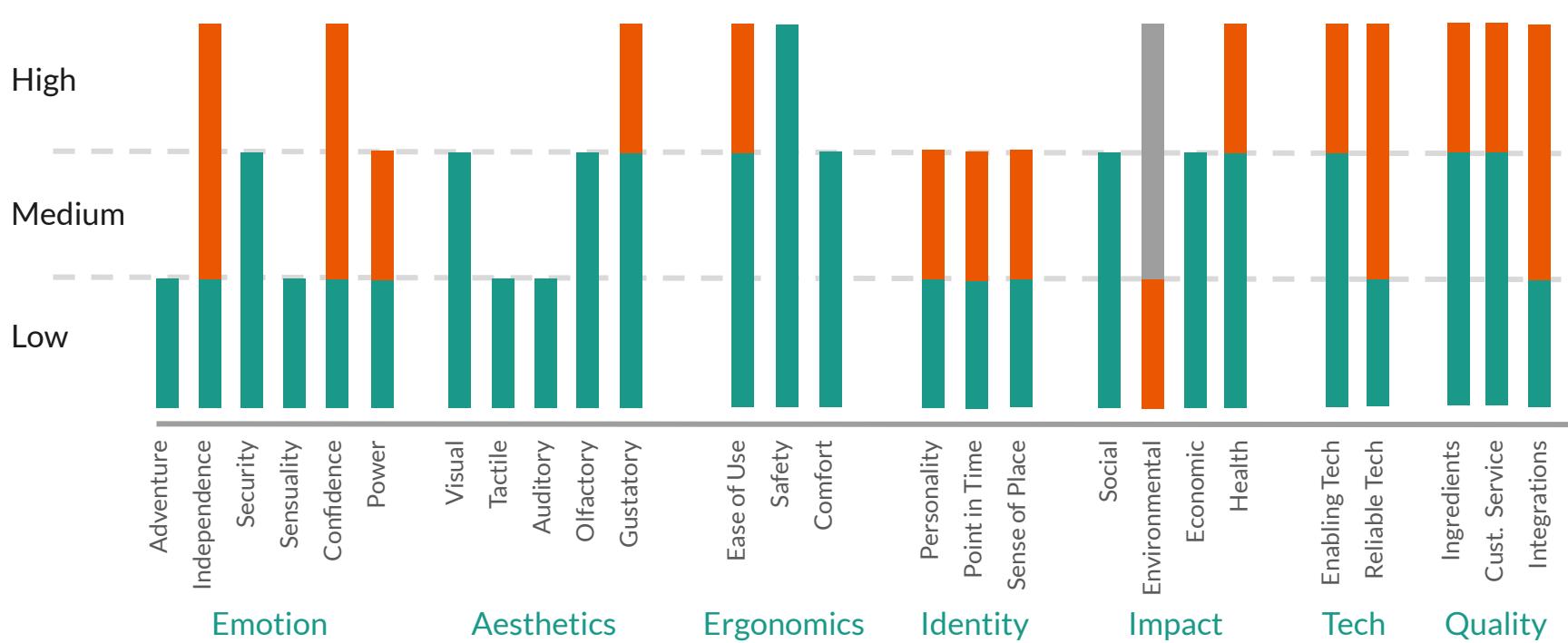
Medium

Low



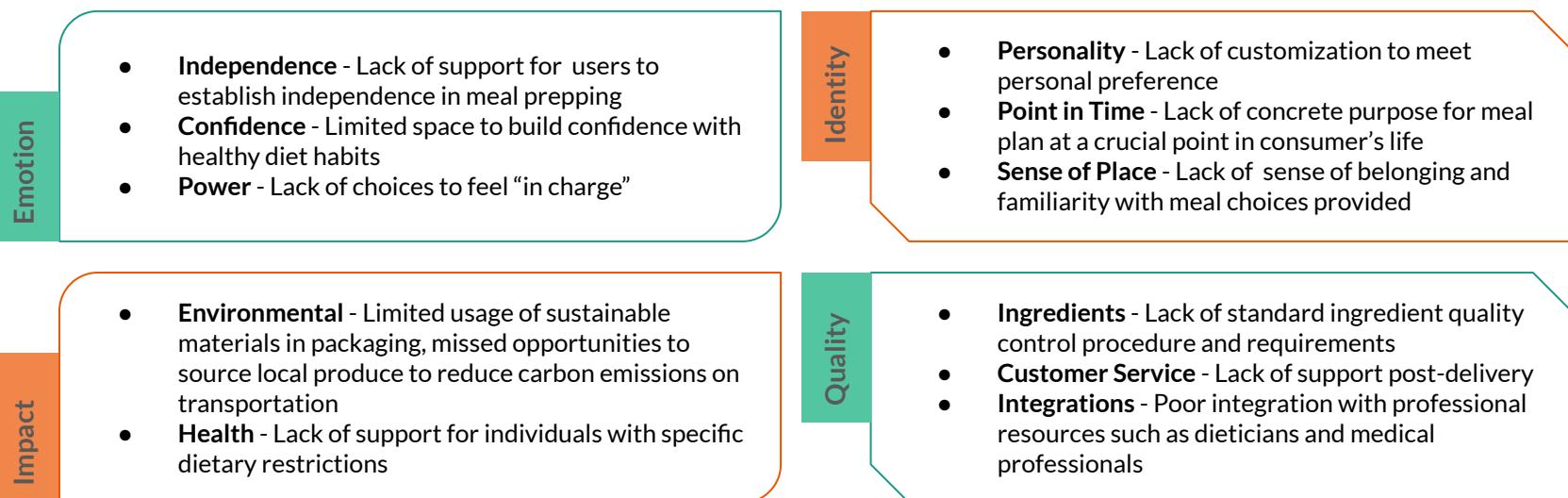


VOA | Future State of the Meal Prep Market



VOA | Comparison

Current Opportunity Gaps



VOA | Analysis

4 areas highlight NutriNeeds' potential to fill critical gaps in the meal prep market that provide clear & specific value to chronic disease patients, healthcare providers, and insurance companies.

Quality Considerations

Quality of ingredients, service, and technological integrations are of key importance to the NutriNeeds target users.

NutriNeed's products will be able to address the current quality gap that stands out from the current market.

Emotional Context

NutriNeeds is able to address an emotional gap for a specific user group who is seeking diet confidence while dealing with the lack of confidence that chronic disease often brings.

This confidence boost should drive a sense of food independence amongst users.

Product Impacts

The opportunity for positive health impacts to NutriNeeds users is profound due to product customization and data-driven optimization.

NutriNeeds customers cares deeply about sustainability, highlighting the environmental value opportunity.

Food-based Identity

Users on medically-informed diets often hold a unique identity around food.

NutriNeeds unlocks an identity for patients with restrictive diets that is based around quality ingredients, health, and great taste.

VOA | Product Requirements

Our impact assessment has informed 4 high-level product requirements

Health

(Rank 1)

- Medical Condition Support
- Dietitian-Approved Plans
- Customization
- Nutritional Information
- Integration with Health Data

Food Safety & Quality

(Rank 2)

- Fresh and Ethical Sourcing
- Food Prep and Handling
- Allergen Management
- Safe Transport and Packaging
- Shelf Life and Storage
- Transparency

Technology

(Rank 3)

- User-Friendly Platforms
- Meal Planning Tools
- Educational Resources
- Accessibility
- Integration with Health Data
- Data Security

Identity & Confidence

(Rank 4)

- Individualized Support
- Community Features
- Success Stories
- Empowerment
- Privacy and Respect



Product Opportunity Gaps

Product Opportunity Gaps for Meal Planning



NUTRINEEDS



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Research Findings

- Pricing is a major factor for over 80% of the participants when considering about meal planning. The **high costs have prohibited the use of meal kit services.**
- **Meal variety** and **optimization** for specific meal conditions are the most desired features for participants.
- Most participants with dietary restrictions plan their own meals and get groceries on their own to increase the variety of meal choices and cut down costs, mainly **relying on dietary suggestions from healthcare professionals, online communities, or dieticians.**
- 45% of participants who have or live with someone with dietary restrictions (70% of our total participants) **would likely to share medical data** to support meal planning.

“My perception has become more negative after I've tried it. It's not a sustainable solution to saving time, money, or eating healthier.”

“Money can't afford it now that I am so sick.”

“Allergy specific meal prep services in my experience have been prohibitively expensive.”

“I choose not to use meal prep service due to the added cost. I do not feel like there is a service that can add enough value to make the cost worth it.”

“I like the convenience of meal prep but there were not enough options for my restrictions so I stopped.”

“As someone who cooks and bakes, I like having ideas for recipes, but I don't always find meal services the most helpful overall.”

“They are expensive and have too much packaging.”

Revisit PESTLE Factors

Economic Factors

Cost structures for the meal kit industry depend on the cost of ingredients, packaging, logistics, technology, and marketing. **Inflation of food costs** is a major factor for companies in this industry to manage.

People who try but then **unsubscribe** from a meal kit service commonly cite **cost** as a motivating factor also.

49% of cancellations cite cost as the biggest issue

59% find cost to be prohibitive in the first place

Socio-demographic Factors

17% of U.S. consumers have used a meal planning or kit service, with younger generations leading adoption.

Age Range:	28 - 43	44 - 59	60+
Adoption Rate:	29%	26%	12%

23% of Men have used a meal planning or kit service, compared to **15%** for Women.

In urban areas, **25%** of people have tried these services compared to **14%** of people in rural areas.

Current Opportunity Gaps



0
1

Users found meal kit services to be expensive.

The portion and pricing of meal kit services are not cost-effective to most users, leading to a high unsubscribe rate after trying with new-customer benefits.



0
2

People have little control over the available meal options.

Despite the effort to provide a variety of recipes, people still found there lacks control over what they can order from meal kit services, especially for people with specific dietary needs.



0
3

Meal kits are not helpful to achieve a healthier lifestyle.

People do not perceive meal kit services as a sustainable way to gain the desired nutritional knowledge and achieve a healthy lifestyle.



Product Requirements / Opportunities

Chloe	Patrick	Zack	Allan
<ul style="list-style-type: none">Provide meals based on the available product are local grocery stores to increase variety.Ingredients will be picked out by local grocery stores with a small additional fee, cutting the price down to grocery-level.Local grocery store delivers, we provide a large number of available recipes, helping people build their recipe knowledge based on their dietary needs	<ul style="list-style-type: none">Meal purchasing options through HSA or food stamps.Seamless, simple UI that is easy to navigate for any age group and across customer stakeholders.Simple cooking instructions that support efficiency for a busy lifestyle or working professionalWell-researched and vetted meals that support various health conditions but customizable ingredient options.	<ul style="list-style-type: none">	<ul style="list-style-type: none">Variety in terms of meals or recipes offered is a strong customer preference, almost equivalent with diet compliant ingredientsclearly communicate cost advantages compared to planning, shopping, and preparing on your ownConsider compliance or compatibility with insurance plans or opportunities to subsidize cost

List of Requirements

- 01** | A meal kit service providing **cost-friendly meal choices**.
Clear communication to customers about cost advantages compared to planning, shopping, and preparing on their own.
- 02** | Well-researched and vetted meals that support **various health conditions** and **customizable ingredient options**.
- 03** | An experience of **achieving healthier lifestyle and obtaining nutritional knowledge** from a variety of professionally created meals or recipes offered.
- 04** | **Reduced costs** from leveraging compliance or compatibility with insurance plans or opportunities.
- 05** | An **easy experience to navigate the platform** for any age group and across customer stakeholders with user-friendly UI and support services.





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NutriNeeds Problem Statement

How might we help people with chronic diseases to achieve targeted & optimized nutrition while solving the challenges of rising food costs, significant time sorting through recipes that support their health condition, and limited options for prepared delivery meals?

Sprint Report



Patrick
Scanlan



Allan
Gulley



Chloe
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Zack
Jessell



Problem Statement

How might we help people with chronic diseases to achieve optimal nutrition while solving the challenges of rising food costs, recipe research for specific health conditions, and limited variety for prepared delivery meals?

6 in 10 U.S. adults have a chronic disease

Poor nutrition is cited as one of the **top 3 causes** and risk factors

17% of U.S. consumers have used a meal prep or kit service



Meal Prep



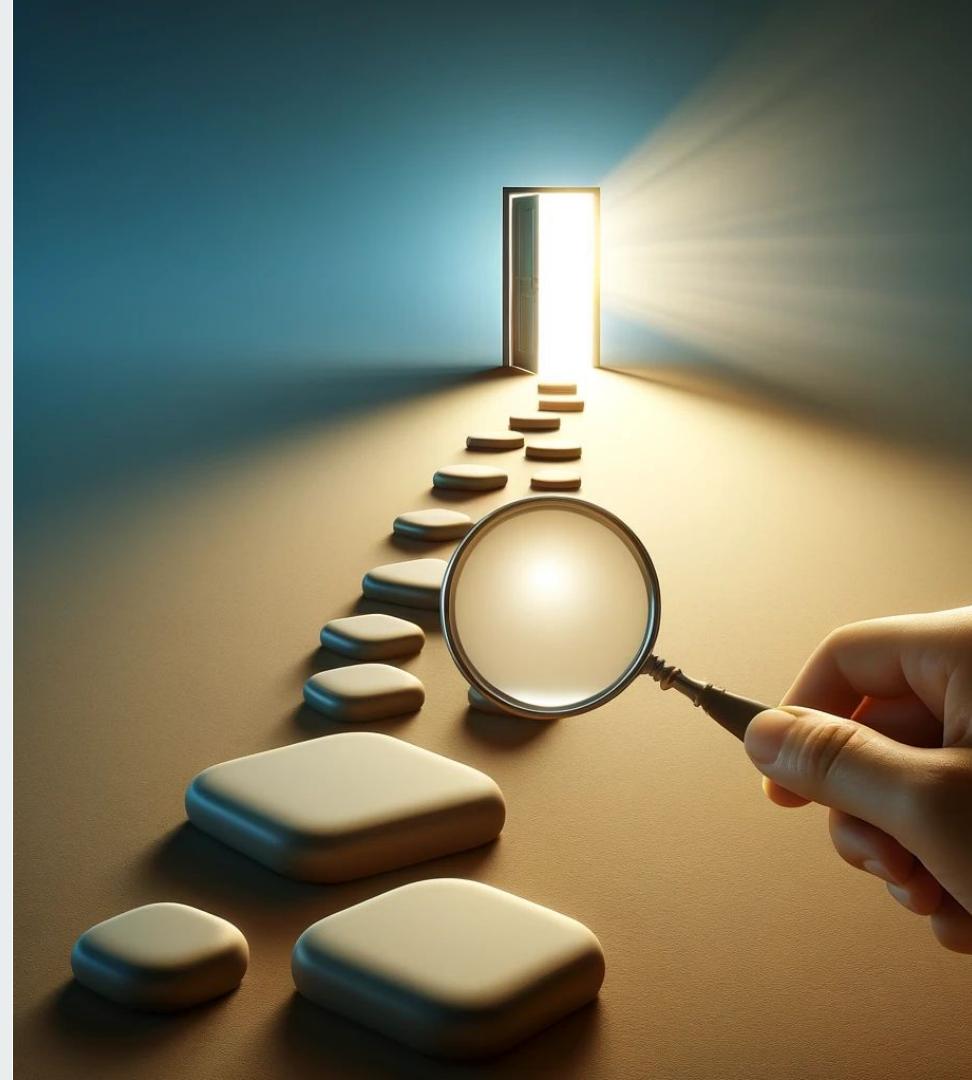
During this sprint, we focused on people with dietary restrictions due to existing medical conditions.

For these target users, we sought to understand their previous experiences as well as their ideal outcomes.

Objectives:

- **Investigate** people's experiences with existing meal prep services
- **Identify** experience outcomes and product opportunity gaps
- **Develop** and **iterate** on our concept

Opportunity Areas



Identify Opportunity Area

PESTLE Factors

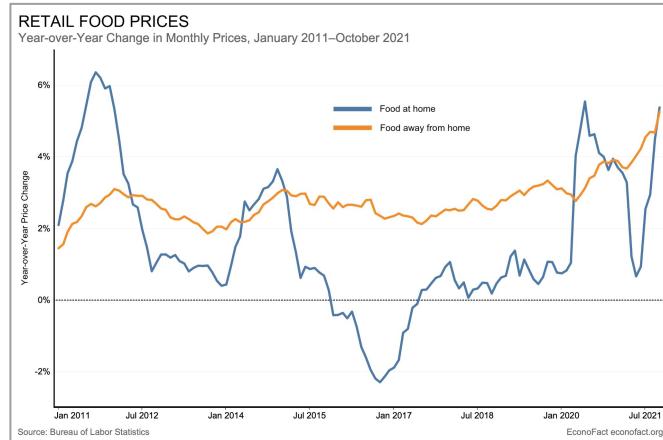
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Identify Opportunity Area

PESTLE Factors

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Dietary Restrictions:	✓	✓	✓
People Affected:	38.4 million	37 million	4.3 million
% of Population:	~9%	~8%	~1%

All of these conditions become more prevalent with age.

Identify Opportunity Area

VOA | *Comparison* between Current & Future Market



Identify Opportunity Area

VOA | High-level Product Requirements

Health (Rank 1)

- Medical Condition Support
- Dietitian-Approved Plans
- Customization
- Nutritional Information
- Integration with Health Data

Food Safety & Quality (Rank 2)

- Fresh and Ethical Sourcing
- Food Prep and Handling
- Allergen Management
- Safe Transport and Packaging
- Shelf Life and Storage
- Transparency

Technology (Rank 3)

- User-Friendly Platforms
- Meal Planning Tools
- Educational Resources
- Accessibility
- Integration with Health Data
- Data Security

Identity & Confidence (Rank 4)

- Individualized Support
- Community Features
- Success Stories
- Empowerment
- Privacy and Respect

Identify Opportunity Area

Research Findings

Key findings from **Online Survey and Interviews**:

- The **high costs have prohibited many people from using meal kit services.**
- People with dietary restrictions are often dissatisfied with **meal variety** with existing services; as result, **meal variety** is one of their most desired features.
- **Optimization** for specific meal conditions is another opportunity gap identified by research participants.
- People **rely on dietary suggestions** from healthcare professionals, online communities, or dieticians.
- People **are open to share medical data** to support meal planning.

“My perception has become more negative after I've tried it. It's not a sustainable solution to saving time, money, or eating healthier.”

“Money can't afford it now that I am so sick.”

“I like the convenience of meal prep but there were not enough options for my restrictions so I stopped.”

Uncover Opportunity Gaps

High Priority Opportunity Gaps



0
1

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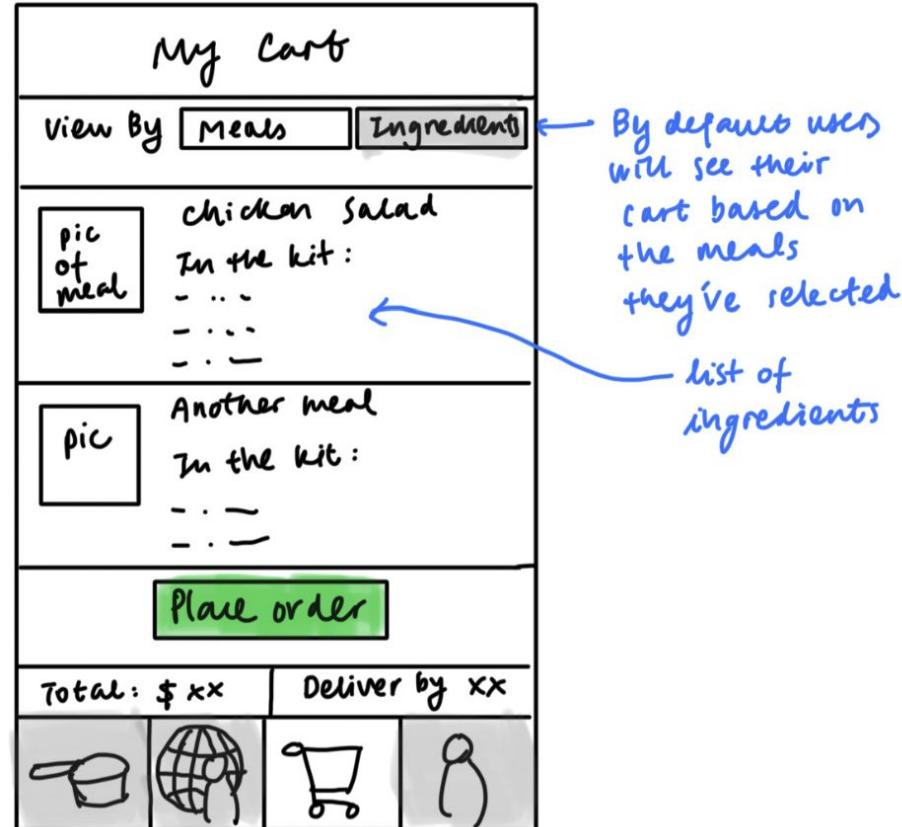
0
2



0
3

Meal kits are not helpful to achieve a healthier lifestyle.

Product Conceptualization



Product Conceptualization

Key Experiences & Requirements

1.

A service that truly **saves our users time, effort, and money**, offering an easy alternative to grocery shopping or takeout.

2.

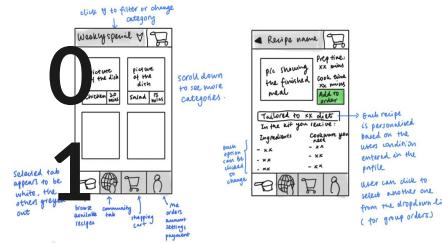
Customizable, tasty recipes that are **applicable to a vast range of dietary restrictions** to support people with chronic health conditions.

3.

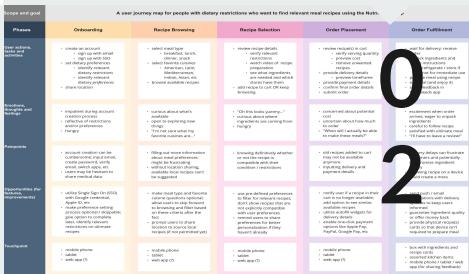
Grant access to a **network of informational, educational, and professional resources** to holistically support health, lifestyle, and diet.

Product Conceptualization

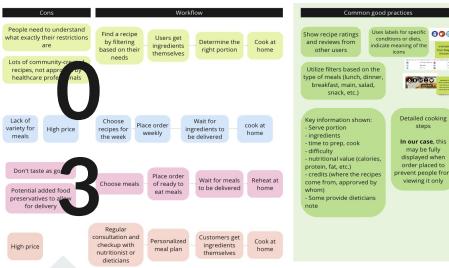
How did we meet these product requirements?



Concept Testing



Experience Outcomes Analysis



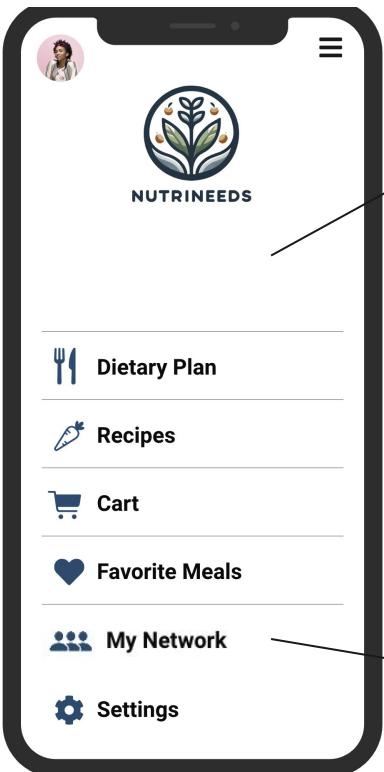
Our goal is to make delivery easier for you. We offer a wide variety of ingredients and instructions to help you prepare your meal. If you have any questions or need more information, please call us at 1-800-541-6523 or email us at info@orderfulfillment.com. Our hours of operation are 8:00 AM - 5:00 PM, Monday through Friday. Please note that we do not accept credit cards over the phone.

2nd day shipping is available for all orders placed by 12:00 PM Eastern Time. Orders placed after 12:00 PM Eastern Time will be shipped the following business day.

Domain Survey



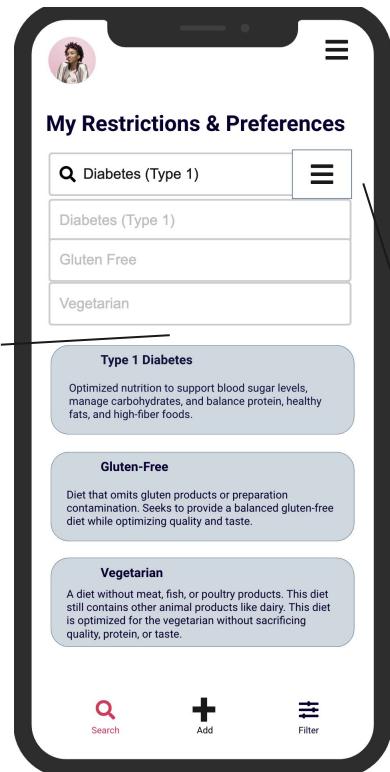
Product Conceptualization



Simple, clean UI

Custom health and diet profile

Connection to social and professional health network

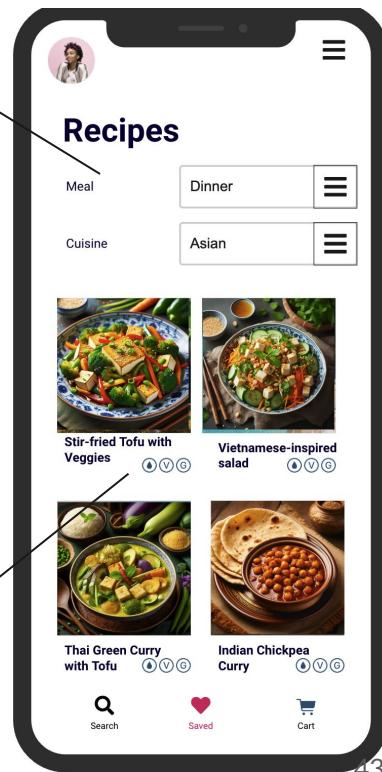


User Experience Priorities

Huge recipe library

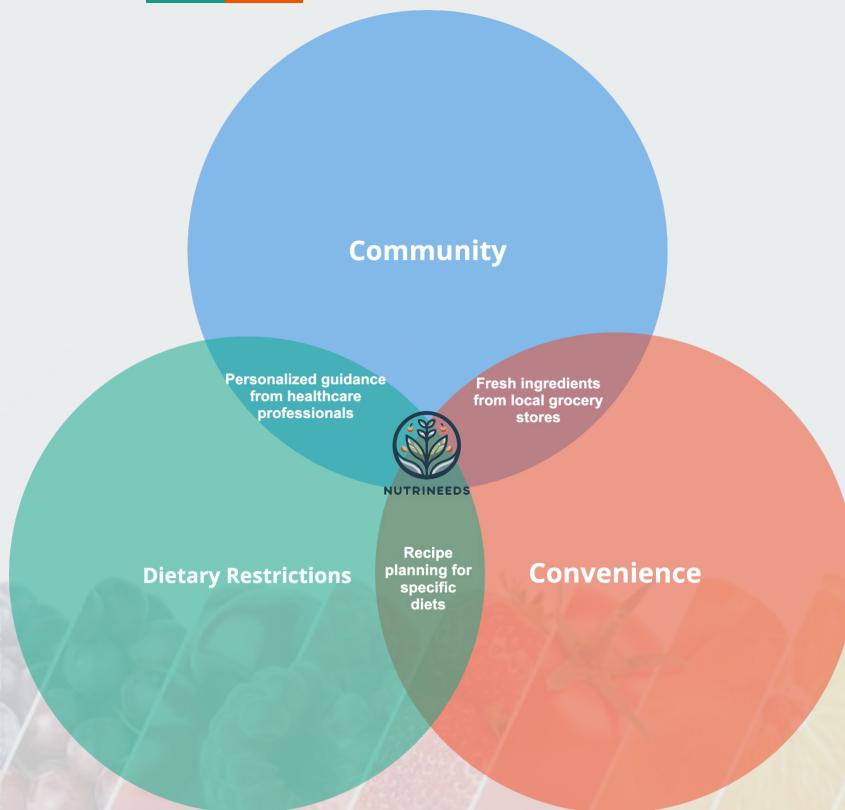
Vast library of resources to support optimized diets

Top ingredients from local sources





Our Solution



NUTRINEEDS

Nutrineeds is a revolutionary meal kit service specializing in personalized meals for individuals with dietary restrictions. We partner with healthcare professionals to ensure recipes are medically sound while also being delicious.

Product Conceptualization

Introducing Nutrineeds



NUTRINEEDS

Nutrineeds is a meal kit service for those with **dietary restrictions due to medical conditions** through **personalized recipes** and **fresh ingredients from local grocery stores**, aiming to improve individual health by connecting the community with healthcare professionals for personalized support.

Prototype



NUTRINEEDS

- Dietary Plan
- Recipes
- Cart
- Favorite Meals
- Settings

Dietary Plan

Dietary Restrictions

Meal Preferences

Medical History

Learn

Search Add My Preferences

My Restrictions & Preferences

Search: Diabetes (Type 1)

Filter: Diabetes (Type 1), Gluten Free, Vegetarian

Type 1 Diabetes: Optimized nutrition to support blood sugar levels, manage carbohydrates, and balance protein, healthy fats, and high-fiber foods.

Gluten-Free: Diet that omits gluten products or preparation contamination. Seeks to provide a balanced gluten-free diet while optimizing quality and taste.

Vegetarian: A diet without meat, fish, or poultry products. This diet still contains other animal products like dairy. This diet is optimized for the vegetarian without sacrificing quality, protein, or taste.

Search Add Filter

Recipes

Meal: Dinner

Cuisine: Asian

Stir-fried Tofu with Veggies

Vietnamese-inspired salad

Thai Green Curry with Tofu

Indian Chickpea Curry

Search Saved Cart

Thai Green Curry with Tofu

Recipe Credit

Dietary Icons / Indications & verifications

Community Reviews:

Ingredients:

Nutrition Facts:

Notes:

Add to Cart

Search Saved Cart

Business Implications

Revenue Streams

Multi-Tire Subscription Options

- ★ **Basic**
- ★ **Basic+** (Access to exclusive content and blog posts.)
- ★ **Premium Model** (Basic Plus and include private annual consultation sessions with nutritionist).





Thank you.

Ready to join us to offer the **ultimate**
meal prepping experience?



NUTRINEEDS



Vision

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Business Model

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Sprint Report



Patrick
Scanlan



Allan
Gulley



Chloe
Jian



Zack
Jessell



Problem Statement

How might we help people with chronic diseases to achieve optimal nutrition while solving the challenges of rising food costs, recipe research for specific health conditions, and limited variety for prepared delivery meals?

6 in 10 U.S. adults have a chronic disease

Poor nutrition is cited as one of the top 3 causes and risk factors

17% of U.S. consumers have used a meal prep or kit service

Identify Opportunity Area

Key Research Findings

Key findings from **Online Survey and Interviews**:

- The **high costs have prohibited many people from using meal kit services**.
- People with dietary restrictions are often dissatisfied with **meal variety** with existing services; as result, **meal variety** is one of their most desired features.
- **Optimization** for specific meal conditions is another opportunity gap identified by research participants.
- People **rely on dietary suggestions** from healthcare professionals, online communities, or dieticians.
- People **are open to share medical data** to support meal planning.

“My perception has become more negative after I've tried it. It's not a sustainable solution to saving time, money, or eating healthier.”

“Money can't afford it now that I am so sick.”

“I like the convenience of meal prep but there were not enough options for my restrictions so I stopped.”

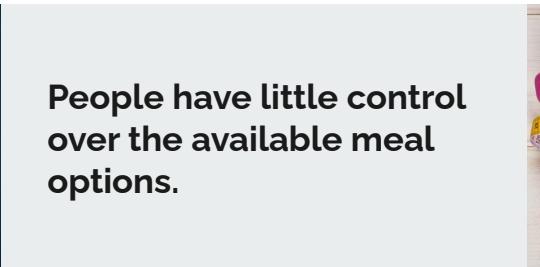
Uncover Opportunity Gaps

High Priority Opportunity Gaps



0
1

Users found meal kit services to be expensive.



People have little control over the available meal options.



0
2



0
3

Meal kits are not helpful to achieve a healthier lifestyle.

Product Conceptualization

Key Experiences & Requirements

1.

A service that truly **saves our users time, effort, and money**, offering an easy alternative to grocery shopping or takeout.

2.

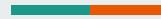
Customizable, tasty recipes that are **applicable to a vast range of dietary restrictions** to support people with chronic health conditions.

3.

Grant access to a **network of informational, educational, and professional resources** to holistically support health, lifestyle, and diet.



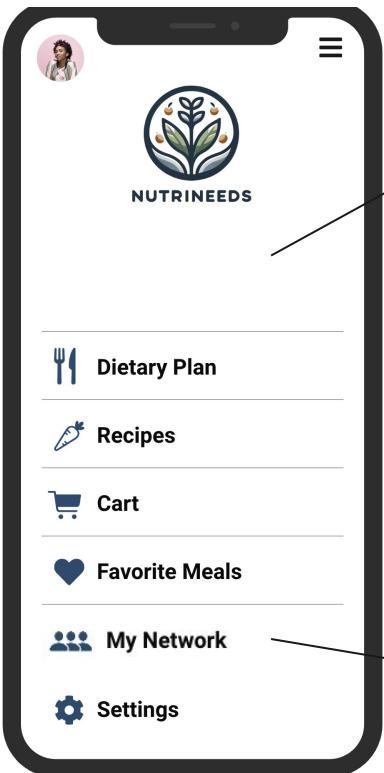
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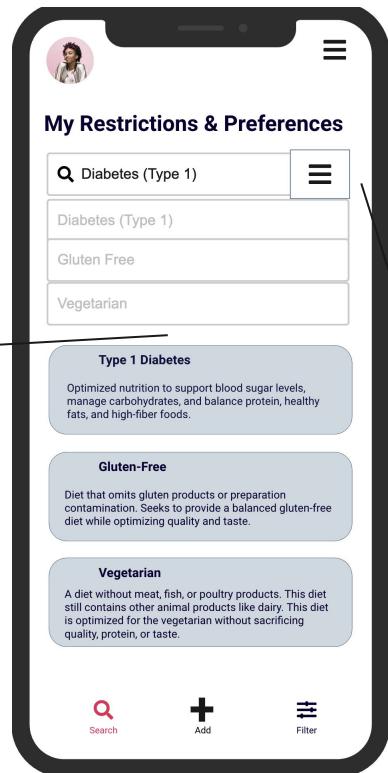
Product Conceptualization



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Custom health and diet profile

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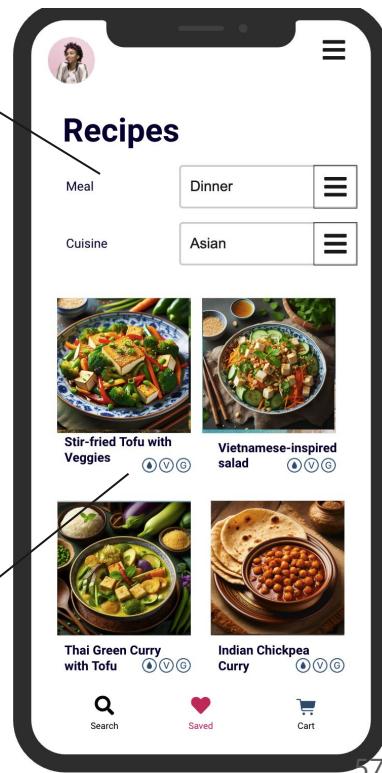


User Experience Priorities

Huge recipe library

Vast library of resources to support optimized diets

Top ingredients from local sources



Business Implications

Socio-Demographic Factors

17% of U.S. consumers have used a meal planning or kit service, with younger generations leading adoption.*

Age Range:	28 - 43	44 - 59	60+
Adoption Rate:	29%	26%	12%

23% of Men have used a meal planning or kit service, compared to **15%** for Women.

In urban areas, **25%** people have tried these services compared to **14%** in rural areas.*

Millions of Americans also suffer from the following conditions which have strict dietary requirements.

Disease:	Diabetes *	Kidney *	Celiac *
Dietary Restrictions:	✓	✓	✓
People Affected:	38.4 million	37 million	4.3 million
% of Population:	~9%	~8%	~1%

All of these conditions become more prevalent with age.

Black and Hispanic people are more likely to have diabetes or kidney disease than White or Asian people, while White people are more likely to have celiac disease.

On average, people in rural areas are more likely to have diabetes or kidney disease than people in urban areas.

Business Implications

Revenue Streams

Multi-Tire Subscription Options

- ★ **Basic**
- ★ **Basic+** (Access to exclusive content and blog posts.)
- ★ **Premium Model** (Basic Plus and include private annual consultation sessions with nutritionist).





Thank you.

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NUTRINEEDS

