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**FOOD AND NUTRITION
INNOVATION INSTITUTE**

Q4

Insight Report

CONSUMER
HEALTH AND
HEALTHCARE

2025



01

Executive Summary

Introduction

In the fourth quarter of 2025, each of the six working groups of the Food and Nutrition Innovation Council (FNIC) convened with a focus on consumer health and healthcare. Each group heard from field experts and engaged in discussions around challenges, tensions, and opportunities within their working group domain as it relates to the consumer.

This report encapsulates insights from the six FNIC working group meetings. It highlights where the distinct groups converged on core themes and how the diversity of thought surfaced tensions inherent to the steps forward. It also offers opportunities to explore these tensions through collaborative work. The purpose of this report is not only to inform, but to equip FNIC members with both strategic guidance and concrete concepts—enabling them to drive equitable and nutrition-driven transformation within their organizations and across the food system.

**FNIC
Working Groups**

- Bioactives**
- Biotech & Novel Ingredients**
- Food as Health**
- Precision Nutrition**
- Nutrition Security**
- Sustainable Nutrition**

High-Level Findings

◆ **The Primary Barriers To Progress Are No Longer Scientific, But Systemic**

Across the six working group topics, members emphasized that evidence, innovation, and promising models already exist. What limits impact is the system's ability to integrate evidence across contexts, translate it responsibly into practice, and sustain it through aligned infrastructure and economic pathways. Without addressing these systemic constraints, even well-evidenced interventions struggle to endure or scale.

◆ **Trust And Human Behavior Determine Whether Solutions Translate Into Real-World Impact**

Members consistently highlighted that transparency, information, and innovation alone are insufficient to change outcomes. Trust, shaped by credibility, values, and lived experience, and human behavior, shaped by dignity, convenience, culture, and cost, mediate whether consumers and communities engage with new approaches. Efforts that overlook these dynamics risk underperforming or exacerbating inequities.

◆ **Durable Change Requires Aligning Incentives And Infrastructure Around Long-Term Value**

The discussions revealed persistent misalignment between who bears costs, who captures benefits, and who absorbs risk. Short-term funding cycles, fragmented infrastructure, and incentives favoring speed or volume over durability constrain progress. Members pointed to the need for coordinated investment, shared infrastructure, and incentive structures that reward prevention, equity, and long-term resilience.

Key Tensions

Speed Of Innovation vs. Credibility And Trust

Pressure to move quickly, whether driven by market forces, funding cycles, or urgency of need, often conflicts with the slower work of evidence validation, trust-building, and responsible communication. Moving too fast risks overclaiming and backlash; moving too slowly risks missed opportunities and relevance.

Precision And Personalization vs. Real-World Usability

Advances in data, personalization, and targeted interventions promise more tailored solutions, yet often increase complexity, cost, and burden on users. Highly precise approaches must be balanced against practicality, accessibility, and sustained adherence in everyday life.

Key Tensions (continued)

Short-Term Costs vs. Long-Term Value

Many nutrition- and health-related interventions generate benefits over time, while requiring upfront investment. Existing economic and financing structures often struggle to recognize or reward long-term prevention, resilience, and equity, favoring short-term efficiency instead.

Integration And Coordination vs. Fragmentation And Silos

Effective solutions increasingly require coordination across food, health, agriculture, and community systems. However, fragmented infrastructure, data systems, funding streams, and incentives reinforce silos, making it difficult to share learning, align action, or scale what works.

Core Themes* at a Glance

Theme	Why It Matters
Evidence Is Abundant; Integration Is the Constraint	Without frameworks that integrate evidence across disciplines and contexts, data abundance can create confusion rather than clarity, slowing decision-making and undermining credibility at the moment leaders need to act.
Trust Is a System Property, Not a Communication Outcome	Trust is shaped by how systems behave, not just what they say, and determines whether evidence, transparency, and innovation translate into adoption or resistance at scale.
Human Behavior Is a Decisive Gatekeeper of Intervention Success	Interventions succeed or fail based on whether they fit into real lives, meaning solutions that ignore dignity, cost, culture, and convenience rarely achieve sustained impact.

*Core themes were derived from the six working group meetings.

Core Themes* at a Glance (continued)

Theme	Why It Matters
Infrastructure, Not Innovation, Is the Binding Constraint to Scale and Durability	Even proven models stall without shared delivery, financing, data, and coordination infrastructure, limiting the system's ability to move from pilots to lasting, scalable impact.
Economics and Incentives Determine What Endures and Expands	When costs, benefits, and risks are misaligned, effective interventions remain fragile; aligning incentives is essential for enabling durability, coordination, and long-term value creation.

**Core themes were derived from the six working group meetings.*

Together, these themes illuminate the structural forces shaping the future of consumer health and healthcare across the food system. They underscore that progress depends less on isolated breakthroughs than on the system's ability to integrate evidence, build trust, design for real human behavior, and align infrastructure and incentives around long-term value. By recognizing these dynamics and the tensions they create, food system leaders are better positioned to move beyond pilot solutions and fragmented efforts toward approaches that are durable, equitable, and responsive to complexity. This report is intended not as a roadmap with fixed answers, but as a shared framework to support informed decision-making, collaboration, and leadership in the next phase of nutrition-driven transformation.

Q4 Speakers



Dr. José Ordovás
Human Nutrition Research
Center on Aging, Tufts



Paul Fuss
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Dr. Danielle Haslam
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David Despain
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Dr. Peter Lurie
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Dr. Becca Jablonski
Colorado State University



Kristin Heltman-Weiss
Providence Farm Collective



Frédéric Laforge
The Farmers' Truck



Dr. Sara Johnson
Pro-Change Behavior
Systems, Inc.



Dr. Allison Collins
Kaiser Permanente Santa
Clara



Yuri Sudhakar
Nudj Health



Dave Chase
Health Rosetta



Dr. Julien Delarue
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Dr. Suzannah Gerber
Association for Meat, Poultry,
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Sarah Miller
Simply Good Foods



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Dr. Laura Lindenfeld
Alan Alda Center for
Communicating Science



Mary Purdy
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Table of Contents

01	Executive Summary	p 02
02	Introduction	p 08
03	Core Themes: Insights, Tensions & Opportunities	p 10
	<i>Theme 1: Evidence Is Abundant; Integration Is the Constraint</i>	p 10
	<i>Theme 2: Trust Is a System Property, Not a Communication Outcome</i>	p 13
	<i>Theme 3: Human Behavior Is a Decisive Gatekeeper of Intervention Success</i>	p 16
	<i>Theme 4: Infrastructure, Not Innovation, Is the Binding Constraint to Scale and Durability</i>	p 19
	<i>Theme 5: Economics and Incentives Determine What Endures and Expands</i>	p 22
04	Conclusion	p 25
05	References	p 26

The content of this report is an interpretation of conversations occurring between members of the Food & Nutrition Innovation Council and guest speakers. It does not necessarily represent the views of any one member of the Council, or those of the Food and Nutrition Innovation Institute, the Friedman School of Nutrition Science & Policy, or Tufts University.



Q4 Insight Report: Consumer Health and Healthcare

Introduction

Food is increasingly understood not only as a source of nourishment, but as a driver of health outcomes, equity, and long-term system resilience. Consumers are navigating a food environment shaped by rising health awareness, persistent affordability constraints, expanding choice, and growing expectations that food systems contribute meaningfully to prevention and well-being. At the same time, healthcare systems, public institutions, and food sector actors are under pressure to translate nutrition science into approaches that are credible, scalable, and responsive to real-world needs.

This quarter, FNIC working groups examined these dynamics through the lens of consumer health and healthcare, exploring how nutrition-driven innovation intersects with real-world consumer needs and health systems. While each group approached these questions from distinct perspectives, their discussions surfaced common challenges related to evidence integration, trust, human behavior, infrastructure, and economic alignment. Together, these insights point to both the promise of nutrition-driven innovation and the system-level conditions required for it to deliver lasting impact.

Signals Shaping the Food System

Food Is Increasingly Positioned As Part Of The Healthcare Continuum

Across the U.S., food is being more explicitly integrated into healthcare strategies focused on prevention, chronic disease management, and population health. Federal agencies now describe Food Is Medicine as a set of approaches that connect nutritious food access with healthcare delivery and

Signals Shaping the Food System (continued)

and community systems, reflecting a shift in how food is positioned within health policy and practice.¹ At the same time, healthcare-linked food interventions such as medically tailored meals, medically tailored groceries, and produce prescription programs are being implemented and evaluated within care settings, signaling growing momentum alongside unresolved questions about evidence standards, reimbursement, and delivery infrastructure.²

Health Is An Increasingly Salient, But Uneven, Driver Of Food Choice

While price and taste remain dominant drivers of purchasing behavior, health considerations are playing a growing role in how consumers evaluate food options. This shift is most evident among higher-income households, where healthfulness has become a primary purchase driver, underscoring both rising demand for health-oriented foods and persistent disparities in who can prioritize health through food choices.³ These dynamics highlight the tension between consumer interest in health and the structural barriers that limit access.

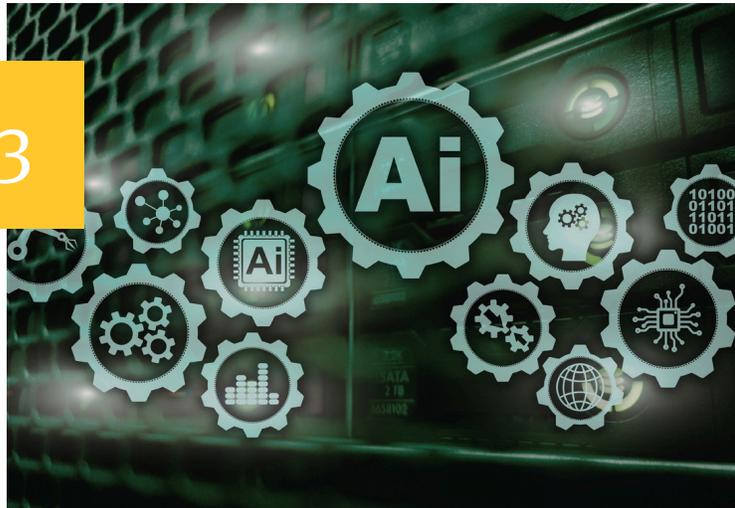
Consumers Show Willingness To Pay For Health, Within Clear Limits

Research continues to show that many consumers are willing to pay more for foods perceived as healthier or more beneficial.⁴ However, this willingness is highly sensitive to affordability, trust, and perceived value, and declines sharply under economic pressure. This signal reinforces the importance of aligning health-driven innovation with real-world cost constraints, particularly for populations already experiencing disproportionate health burdens.

Taken together, the discussions from this quarter point to a set of shared system dynamics shaping how food and nutrition intersect with consumer health and healthcare. The sections that follow focus on these dynamics, not as isolated challenges, but as interrelated conditions that influence whether nutrition-driven innovation can move from promise to practice. This framing is intended to support clearer understanding around what enables credibility, equity, and durability in an increasingly complex food system.

03

Core Themes



Each of the following cross-cutting themes contains key insights, tensions and challenges, and opportunities for action designed to spark the partnerships and collaboration required to reshape the food system.

01 Evidence Is Abundant; Integration Is the Constraint

Across the food system, leaders are not facing a shortage of data or research, but a growing challenge in integrating different forms of evidence across biological, behavioral, environmental, and economic systems. As innovation accelerates, the primary constraint has shifted from discovery to interpretation: determining what evidence means, how far it can responsibly travel, and how it can be applied without oversimplifying complexity or eroding credibility. Progress increasingly depends on disciplined integration rather than additional accumulation.

Key Insights

01. The System Is Rich In Evidence But Poor In Integration

Significant evidence exists across domains such as soil health, nutrient density, biomarkers, clinical outcomes, consumer behavior, and farm economics. However, these evidence streams are generated using different methods, assumptions, and standards of proof, and are rarely designed to connect with one another. Without shared frameworks to relate these signals, valid findings often fail to translate across sectors or are misapplied when used outside their original context.

02. More Data Does Not Resolve Uncertainty, And It Often Amplifies It

Participants across working groups emphasized that increasing data volume alone does not lead to clearer decisions or faster adoption. In many cases, it increases noise by introducing more partial, context-dependent signals without guidance on how to weigh or reconcile them. The central challenge is not filling knowledge gaps, but interpreting what existing evidence means, and does not mean, for specific decisions.

03. Credibility Depends On Restraint As Much As Rigor

As areas such as precision nutrition, bioactives, sustainable nutrition, and foodtech innovation move from research and pilots into products, programs, and policy conversations, expectations around credibility and accountability increase. Members repeatedly underscored that disciplined claim-making, such as clearly distinguishing correlation from causation, acknowledging uncertainty, and resisting pressure to overstate impact, is essential to maintaining trust. In these fast-moving domains, restraint is not a brake on progress but a strategic practice that protects long-term legitimacy.

Tensions & Challenges

Integration vs. Overreach

Efforts to connect complex systems risk either remaining fragmented or collapsing nuance into simplified causal stories. The pressure to deliver clear narratives can conflict with the realities of multifactorial systems where relationships are probabilistic rather than linear.

Speed vs. Credibility

Innovation cycles are advancing faster than shared validation standards and governance norms. While speed enables experimentation, premature claims can undermine trust at the product, category, or field level.

Precision vs. Decision Relevance

Highly granular data and advanced models may generate precise signals that are difficult to translate into real-world decisions. Precision that does not align with practical constraints or decision timelines risks becoming impressive but unusable.

Opportunities

Build integrative evidence frameworks that preserve complexity

Rather than seeking singular metrics or definitive narratives, research institutions, funders, industry leaders, and cross-sector collaboratives can invest in integrative frameworks that explicitly map how different types of evidence relate to one another. These frameworks can clarify where relationships are associative rather than causal, where uncertainty remains, and how insights should be interpreted across contexts. By making complexity legible rather than erasing it, integrative frameworks allow evidence to travel responsibly across research, policy, procurement, and practice without overstating certainty or undermining credibility.

Align evidence standards with decision contexts

Different decisions require different forms of proof, yet misalignment about what constitutes “sufficient evidence” frequently slows coordination or leads to misplaced skepticism. Researchers, practitioners, institutional decision-makers, and funders can work together to clarify which types of evidence are appropriate for piloting, scaling, procurement, or policy adoption. Making these distinctions explicit helps prevent both premature scaling and unnecessary delay, enabling emerging insights to be used where they are fit-for-purpose while preserving rigor where higher certainty is required.

02 Trust Is a System Property, Not a Communication Outcome



Across food system domains, trust consistently emerged as a precondition for progress rather than a downstream result of better information or clearer messaging. Evidence, transparency, and innovation only influence behavior when they are interpreted through trusted relationships, institutions, and narratives. Trust is shaped by

values, perceived intent, economic fairness, and governance which are factors that operate at the system level and extend well beyond communication tactics. As food system initiatives scale and become more visible, trust dynamics intensify, making credibility, restraint, and alignment across actions and narratives increasingly consequential.

Key Insights

01. Transparency Reinforces Trust; It Does Not Create It

Across discussions of sustainable nutrition, bioactives, and consumer engagement, members emphasized that making more information available does not reliably lead to understanding or behavior change. Transparency functions primarily as a signal of openness for audiences that already trust the source, while often being ignored, or actively scrutinized, by those who do not. Without trust grounded in shared values and perceived legitimacy, additional information can deepen skepticism rather than resolve it.

02. Trust Is Shaped By System Behavior, Not Isolated Messages

Trust is built and eroded through consistent patterns of behavior across research, product development, pricing, partnerships, and governance and not through individual communications alone. Overclaiming, misaligned incentives, or economic instability can undermine trust even when messages are accurate. Conversely, restraint, fairness, and reliability function as trust signals, particularly for institutions and communities that have experienced volatility or extraction.

03. Scale Changes Trust Dynamics And Raises The Stakes

As food system initiatives, such as food as medicine programs, novel ingredient categories, precision nutrition platforms, and sustainability claims, move from pilots into broader markets and institutions, expectations around accountability, credibility, and transparency increase. Smaller or emerging actors may benefit from early goodwill, while larger institutions face heightened skepticism and scrutiny. At scale, narrative missteps, perceived overreach, or inconsistencies between stated values and operational realities can trigger backlash that affects entire categories, not just individual actors.

Tensions & Challenges

Transparency vs. Legitimacy

Efforts to increase transparency often assume that more disclosure leads to greater trust. In practice, transparency without legitimacy can expose or amplify skepticism, particularly when audiences question motives or values rather than facts.

Growth vs. Credibility

Scale is necessary to achieve impact, yet growth often increases distrust if it is perceived as compromising authenticity, fairness, or intent. Organizations must navigate how to expand reach without eroding the relational foundations that made early progress possible.

Narrative Clarity vs. System Complexity

Clear narratives support alignment and action, but simplified stories can obscure trade-offs or uncertainty. Overly reductive framing risks undermining trust when lived experience or downstream impacts contradict the story being told.

Opportunities

Design trust into systems, not just communications

Researchers, industry leaders, funders, and policymakers can strengthen trust by aligning evidence generation, economic incentives, governance structures, and communication practices around shared values and accountability. This includes pacing claims alongside evidence maturity, ensuring fairness in pricing and partnerships, and embedding credibility practices into decision-making processes. When trust is treated as a system property rather than a messaging goal, transparency becomes reinforcing rather than risky.

Coordinate narratives to support shared problem-solving

Cross-sector conveners, research translation organizations, community-based organizations, and institutional leaders can play a critical role in shaping narratives that invite collaboration rather than defensiveness. By framing challenges in ways that acknowledge trade-offs, avoid assigning blame, and emphasize shared responsibility, leaders can reduce polarization and maintain engagement as initiatives scale. Coordinated narrative strategies help ensure that increased visibility strengthens collective progress rather than triggering backlash.

03

Human Behavior Is a Decisive Gatekeeper of Intervention Success

Across food system domains, from novel ingredients and precision nutrition to food as medicine and nutrition security, human behavior consistently emerged as the decisive factor shaping whether interventions succeed or stall. Scientific validity, technological sophistication, and program design are necessary but insufficient on their own. Adoption depends on whether solutions fit into people's lived realities: their routines, cultural norms, financial constraints, sensory expectations, and sense of dignity. When interventions fail to account for these factors, even strong evidence and good intentions do not translate into sustained impact.



Key Insights

01. Adoption Unfolds In Stages, Not Leaps

This insight was most clearly surfaced in discussions of biotech and novel ingredients, where experts described adoption as a multi-stage process involving acceptance, trial, adoption, and sustained adherence. Early experiences, such as taste, ease of use, cultural fit, or perceived relevance, strongly shape whether people continue engaging. Missteps at these early stages can undermine not only individual products, but trust in entire categories, even when the underlying science is sound.

02. Information Alone Does Not Change Behavior

Across food as health, nutrition security, and sustainable nutrition discussions, members consistently emphasized that education and information delivery are weak levers when used in isolation. People do not reliably act on what they know, particularly when healthier choices require additional time, cost, effort, or cognitive load. Behavior change is far more likely when systems reduce friction, simplify choices, and align with existing habits rather than asking individuals to overcome structural barriers through willpower or knowledge alone.

03. Dignity, Agency, And Cultural Relevance Shape Participation

This insight was most strongly expressed in discussions of nutrition security and food as health, where members described how choice-based access, cultural relevance, and non-stigmatizing design increase engagement and adherence. Interventions that preserve agency and respect lived experience tend to outperform prescriptive or corrective models. In this context, dignity functions not as an abstract value, but as a practical driver of sustained behavior change.

Tensions & Challenges

Personalization vs. Practicality

Highly tailored solutions, such as personalized nutrition recommendations, can increase relevance but often add complexity and burden. Without careful design, personalization risks overwhelming users or becoming impractical at scale.

Choice vs. Structure

Providing autonomy and choice supports dignity and engagement, yet too many options or unclear guidance can create confusion or decision fatigue. Effective systems must balance agency with supportive structure.

Short-Term Engagement vs. Long-Term Adherence

Many interventions show early promise but struggle to sustain participation over time. Maintaining behavior change requires ongoing reinforcement, convenience, and alignment with daily life, not just initial motivation.

Opportunities

Design interventions around real-world use, not idealized behavior

Program designers, product developers, healthcare partners, and community organizations can strengthen impact by starting with how people actually live, shop, cook, and eat rather than how systems wish they would behave. This includes accounting for time constraints, financial pressures, sensory preferences, and cultural norms. Designing for real-world conditions reduces friction and increases the likelihood that evidence-based solutions translate into durable habits.

Shift from education-first models to enablement-first systems

Health systems, policymakers, funders, and implementers can increase effectiveness by prioritizing models that make healthy choices easier by default. This includes improving access, affordability, convenience, and continuity of support, rather than relying primarily on counseling or information. When systems are designed to enable healthier behavior, individuals are not asked to compensate for structural gaps on their own.



04 Infrastructure, Not Innovation, is the Binding Constraint to Scale and Durability

Across working group conversations, members repeatedly emphasized that while innovation and evidence continue to advance, the ability to sustain, scale, and coordinate effective interventions is increasingly constrained by gaps in infrastructure. Participants noted that these constraints are not primarily technical, but structural, spanning care delivery, financing, validation, translation, regional aggregation, and cross-sector coordination. In this context, infrastructure extends beyond physical assets to include institutional arrangements, data and evaluation systems, workforce capacity, and shared ways of working. When these enabling foundations are absent or fragmented, even well-evidenced and well-intentioned interventions struggle to move beyond pilots, remaining siloed or fragile rather than becoming durable system-level solutions.

Key Insights

01. Many High-Impact Models Stall Due To Missing Backbone Infrastructure

This insight was most clearly surfaced in food as health and nutrition security discussions, where effective programs exist but lack the operational, financial, and governance backbones needed for durability. Participants highlighted that extending care beyond the clinic, operating mobile markets, or sustaining community-led access models requires reliable delivery systems, staffing, financing, and coordination, which are elements that are often underdeveloped or funded episodically. As a result, impact remains localized even when demand and evidence are strong.

02. Translation And Coordination Capacity Is A Form Of Infrastructure

Across bioactives, biotech, and sustainable nutrition discussions, members pointed to the absence of roles, tools, and structures that help evidence move coherently from research into practice. Boundary-spanning functions, such as interpretation, validation, and cross-sector coordination, are often treated as informal or downstream activities rather than as essential infrastructure. When this capacity is missing, organizations rely on individual effort and ad hoc translation, which becomes increasingly brittle as complexity and scale increase.

03. Fragmented Infrastructure Reinforces Silos And Slows Learning

Members noted that data systems, evaluation methods, financing pathways, and operational platforms are typically designed around individual programs, funders, or sectors rather than around shared learning and coordination. As a result, similar interventions are often evaluated using different metrics, financed through disconnected mechanisms, and implemented on parallel platforms that do not communicate with one another. This fragmentation makes it difficult to compare models, understand system-level effects, or adapt successful approaches across regions, leading to repeated reinvention and limiting the system's ability to build cumulative progress over time.

Tensions & Challenges

Flexibility vs. Standardization

Local adaptation is essential for relevance and equity, yet a lack of shared standards and platforms increases cost and complexity. Systems must balance the need for flexibility with the efficiency gains that come from shared infrastructure.

Innovation Speed vs. Infrastructure Readiness

New models and technologies can be piloted quickly, but the infrastructure required to support them, such as financing, workforce, data, governance, develops more slowly. This mismatch can leave innovations stranded between proof and scale.

Program Ownership vs. System Coordination

Organizations are often incentivized to build and control their own platforms, even when shared infrastructure would reduce duplication and increase impact. Aligning incentives for collaboration remains a persistent challenge.

Opportunities

Invest in shared infrastructure that serves multiple models and sectors

Funders, investors, public agencies, and large institutional partners can accelerate impact by prioritizing infrastructure that supports multiple interventions simultaneously, such as regional aggregation and processing, shared data and evaluation platforms, financing mechanisms, and delivery systems. These investments reduce duplication, lower operating costs, and allow successful models to scale without being rebuilt from scratch in each context. Treating infrastructure as a public or quasi-public good shifts the system from isolated pilots toward cumulative progress.

Recognize translation and coordination as core system functions

Research institutions, healthcare systems, industry leaders, funders, and cross-sector conveners can strengthen outcomes by formally resourcing the work of translating evidence into practice and coordinating action across sectors. This includes investing in dedicated roles, shared reference frameworks, and coordination mechanisms that help diverse actors interpret evidence consistently and align implementation. Treating translation and coordination as core system functions, rather than informal or downstream activities, reduces reliance on individual heroics and improves resilience as initiatives move from pilots to scale.

05

Economics and Incentives Determine What Endures and Expands



Across working group conversations, members consistently emphasized that evidence of effectiveness alone does not determine which interventions endure or expand. Instead, economic structures and incentive alignment shape whether promising models persist beyond pilots, attract sustained investment, or remain dependent on

short-term funding. Financing flows, cost distribution, risk allocation, and value capture influence which approaches can mature into durable system components. Without economic pathways that reward prevention, coordination, and long-term value creation, even well-evidenced interventions struggle to move from proof to persistence.

Key Insights

01. Proven Impact Does Not Guarantee Financial Viability

This insight was most strongly surfaced in food as health and nutrition security discussions, where programs demonstrated clear health or access benefits but lacked sustainable financing. Participants noted that cost savings or downstream benefits often accrue to actors different from those bearing implementation costs, leaving effective models financially fragile. As a result, interventions that succeed in practice may still fail to endure without mechanisms to capture and reinvest value.

02. Incentives Shape Behavior Across The System

Across working group meetings, members emphasized that incentives, both explicit and implicit, quietly but powerfully shape decisions by producers, institutions, innovators, and consumers. Incentives embedded in pricing, financing, procurement, performance metrics, and investment timelines often reward volume, speed, or short-term returns, even when stated goals emphasize prevention, equity, or long-term resilience. When incentives are misaligned, actors behave

rationality within those constraints, producing outcomes the system may not intend. Conversely, when incentives are aligned with desired outcomes, they enable coordination, investment, and behavior change even in complex, multi-actor systems.

Tensions & Challenges

Short-Term Costs vs. Long-Term Value

Many interventions generate benefits over time, such as improved health outcomes, reduced environmental impact, or greater system resilience, while requiring upfront investment. Existing financing models often struggle to recognize or reward these longer-term returns.

Growth Incentives vs. System Stability

Rapid growth and first-mover advantage can attract capital, but they may also encourage overextension or volatility. Slower, more coordinated approaches may struggle to compete for funding despite offering greater durability and resilience.

Equity vs. Efficiency

Efforts to improve access, fairness, or environmental outcomes can increase cost or complexity in the short term. Without intentional incentive design, these efforts risk being deprioritized in favor of models optimized for near-term efficiency.

Opportunities

Design financing mechanisms that align costs and benefits

Funders, payers, policymakers, and institutional purchasers can strengthen durability and expansion by creating financing structures that allow those who invest in prevention, coordination, and access to capture a share of the value generated. This includes shared-savings models, longer-term contracting, and mechanisms that reinvest returns into the communities and systems that produce them. Aligning costs and benefits reduces reliance on temporary funding and enables effective models to endure.

Shift incentives toward durability and coordination

Investors, funders, and system leaders can encourage more resilient outcomes by rewarding approaches that demonstrate long-term value, collaboration, and risk-sharing rather than speed or volume alone. This may include patient capital, blended finance, or performance metrics that value stability, learning, and system-level outcomes. When incentives favor durability, actors are more willing to coordinate and invest beyond short-term horizons.



Conclusion

The insights from this quarter’s working group discussions reinforce that advancing consumer health and healthcare through food is not a matter of discovering new ideas, but of strengthening the conditions that allow existing evidence and innovation to take hold. Across diverse domains, members and speakers pointed to recurring constraints related to integration, trust, human behavior, infrastructure, and economic alignment, which are factors that shape whether promising approaches endure or remain confined to pilots. These dynamics highlight the limits of isolated interventions and the importance of addressing food and nutrition challenges as interconnected system issues.

Taken together, the themes in this report underscore that progress depends on navigating trade-offs rather than eliminating them. Efforts to improve health outcomes through food must balance precision with practicality, speed with credibility, and innovation with durability. Recognizing these tensions allows leaders to move beyond binary debates and toward strategies that are more adaptive, equitable, and resilient in the face of complexity.

Ultimately, this report points to a central conclusion: the future impact of nutrition-driven innovation will be determined less by the volume of activity underway and more by how effectively systems align evidence, incentives, infrastructure, and trust. By focusing attention on these underlying dynamics, the food system is better positioned to translate promise into lasting impact for consumers and communities alike.

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