



Opportunity

Increasing the consumption of locally produced food can reduce fossil fuel use in transport, which accounts for nearly **20% of total food system emissions**.¹ Long supply chains can reduce the nutritional value of produce over time, while locally sourced foods are often fresher and retain more of their original nutrient content. While road transport is responsible for about **75% of global transport-related CO₂ emissions**,² food also travels by sea and, in the case of high-value or perishable goods, by air—both of which add substantially to the carbon footprint of global food supply chains. Cutting back on long-distance food transport offers a clear opportunity to lower emissions. At the same time, improved nutrition can help shift healthcare from a reactive, treatment-based model to one focused on prevention.

Chronic diseases—many diet-related—drive the majority of healthcare spending in high-income regions, including approximately **90% of the U.S.'s \$4.5 trillion annual healthcare costs**³ and **over 70% in the EU**.⁴ Pharmaceutical companies increasingly recognize that nutrition-based prevention can reduce disease progression, improve outcomes, and support new value streams in digital health and lifestyle therapeutics. Programs like medically tailored meals have shown promise in reducing hospitalizations and overall costs, illustrating how food-as-medicine can complement traditional care.

Beyond health, local food systems strengthen economies and support sustainability. In the U.S. and EU, direct-to-consumer models help small and mid-sized farms. In the U.S., they generate **up to seven times more net revenue per unit** than wholesale.⁵ For example, **Iowa's 152 farmers' markets created 576 jobs and \$59.4 million in output**.⁶ In the EU, short food supply chains raise margins and build community ties. Studies in Spain and the UK show **€2.50–£3.70 in local activity** per euro or pound spent.⁸ Over 60% of shoppers also visit nearby businesses.⁵ EU policy sees these systems as vital for rural development.⁷ Local food initiatives can also support mental health by fostering social connection and strengthening community well-being.

By fostering local food production and consumption, communities can reinforce local agriculture, reduce healthcare costs, and create new opportunities for pharma to engage in preventive health.

¹Li M, Jia N, Lenzen M, Malik A, Wei L, Jin Y, Raubenheimer D. Global food-miles account for nearly 20% of total food-systems emissions. *Nature Food*. 2022;3(6):445–453.

²International Energy Agency. *Transport – Energy System*. IEA; 2023.

³Centers for Disease Control and Prevention. *Fast facts: health and economic costs of chronic conditions*. Atlanta: CDC; 2024 Jul 12 [cited 2025 May 20].

⁴European Commission. *Health-EU newsletter – chronic diseases*. Issue 169. Brussels: European Commission; 2016 Feb 25 [cited 2025 May 20].

⁵O'Hara JK. *Market forces: creating jobs through public investment in local and regional food systems*. Cambridge (MA): Union of Concerned Scientists; 2011 Aug.

⁶Otto D. *Consumers, vendors, & the economic importance of Iowa farmers markets: economic impact survey analysis*. Ames (IA): Iowa Department of Agriculture & Land Stewardship; 2010.

⁷European Parliamentary Research Service. *Short food supply chains and local food systems in the EU*. Brussels: European Parliament; 2016.

⁸Zazpe I, Arana J, Alday J, et al. *Measuring the economic impact of farmers' markets on local economies: a case study of the Basque Country*. *Agriculture*. 2018;8(1):10.

Need to drive collective innovation

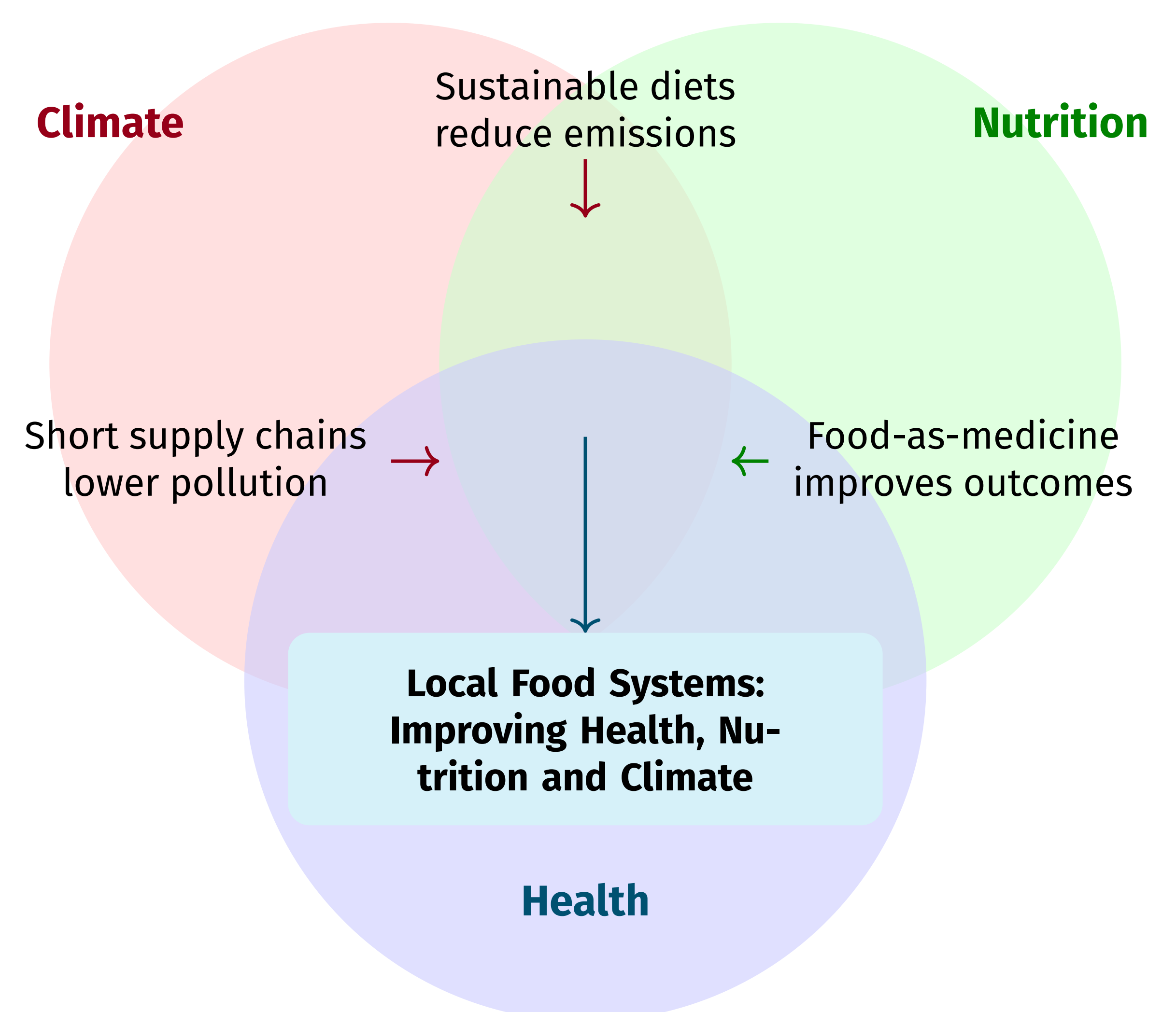
Shifting healthcare from a treatment-based model to one centered on prevention and wellness requires engagement across the food, healthcare, pharmaceutical, and agricultural sectors. No single actor can lead this transformation; collaboration is needed to align incentives, bridge gaps, and build scalable, sustainable solutions. This includes coordinated efforts across agriculture (producers, land stewards), the food sector (processing, retail, distribution), and civil society—especially community groups that foster grassroots engagement and equitable access.

Cross-sector innovation can enable integrated approaches that combine food-as-medicine, precision nutrition, digital health, and sustainable agriculture. This collective effort can scale preventive healthcare, lower costs, and unlock new opportunities for the food and pharmaceutical industries.

Fragmented efforts will limit impact. Local food systems can improve health and economic resilience, but scaling them requires support from policymakers, providers, and infrastructure players. Similarly, pharmaceutical companies need partners in agriculture and digital health to co-develop evidence-based, data-driven solutions.

Bringing these stakeholders together can drive systemic change and ensure preventive care is accessible, effective, and sustainable. Only through collaboration can we build an ecosystem that advances both health and economic resilience.

Integrated Opportunity Space



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Collective Co-Creation

This collective will work with participants from the early definition of a **shared needs** all the way to the piloting and delivery of **targeted solutions**.



Potential Topics of Discussion in the Problem Space

1. **Scaling Food-as-Medicine:** Integrating Nutrition into Healthcare Models

- How can healthcare providers, payers, and pharmaceutical companies integrate food-as-medicine programs into existing care models?
- What policy and reimbursement changes are needed to support medically tailored meals, produce prescriptions, and nutrition-based interventions?
- What role can technology (e.g., AI-driven personalized nutrition plans) play in making these programs scalable and cost-effective?

2. **Innovative Partnerships:** Creating Cross-Sector Collaborations

- How can food producers, healthcare organizations, and pharmaceutical companies work together to drive preventive health strategies?
- What are best practices for structuring public-private partnerships to fund and scale sustainable food initiatives?
- How can companies leverage emerging business models (e.g., value-based care) to align incentives across agriculture, healthcare, and pharma?

3. **Economic and ESG Opportunities:** Building Sustainable Business Cases

- How can local food systems contribute to corporate ESG (Environmental, Social, and Governance) goals for healthcare and pharmaceutical companies?
- What financial models and funding mechanisms can help scale sustainable food production while maintaining affordability for consumers?
- How can investment in local agriculture support economic resilience and job creation while addressing social determinants of health?

4. **Digital Health and Precision Nutrition:** Leveraging Data to Drive Impact

- How can digital health tools (e.g., wearable technology, AI-driven dietary analysis) help personalize nutrition and improve adherence?
- What are the opportunities for pharmaceutical companies to integrate nutrition-based therapies into digital health platforms?
- How can data-sharing frameworks enable collaboration between healthcare providers, food producers, and policymakers?

5. **Regulatory and Policy Innovation:** Overcoming Barriers to Scale

- What policy changes are needed to facilitate the integration of nutrition into healthcare reimbursement models?
- How can regulatory frameworks evolve to support innovations in personalized nutrition, nutraceuticals, and sustainable agriculture?
- What incentives can governments provide to encourage investment in local food systems and preventive health initiatives?

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