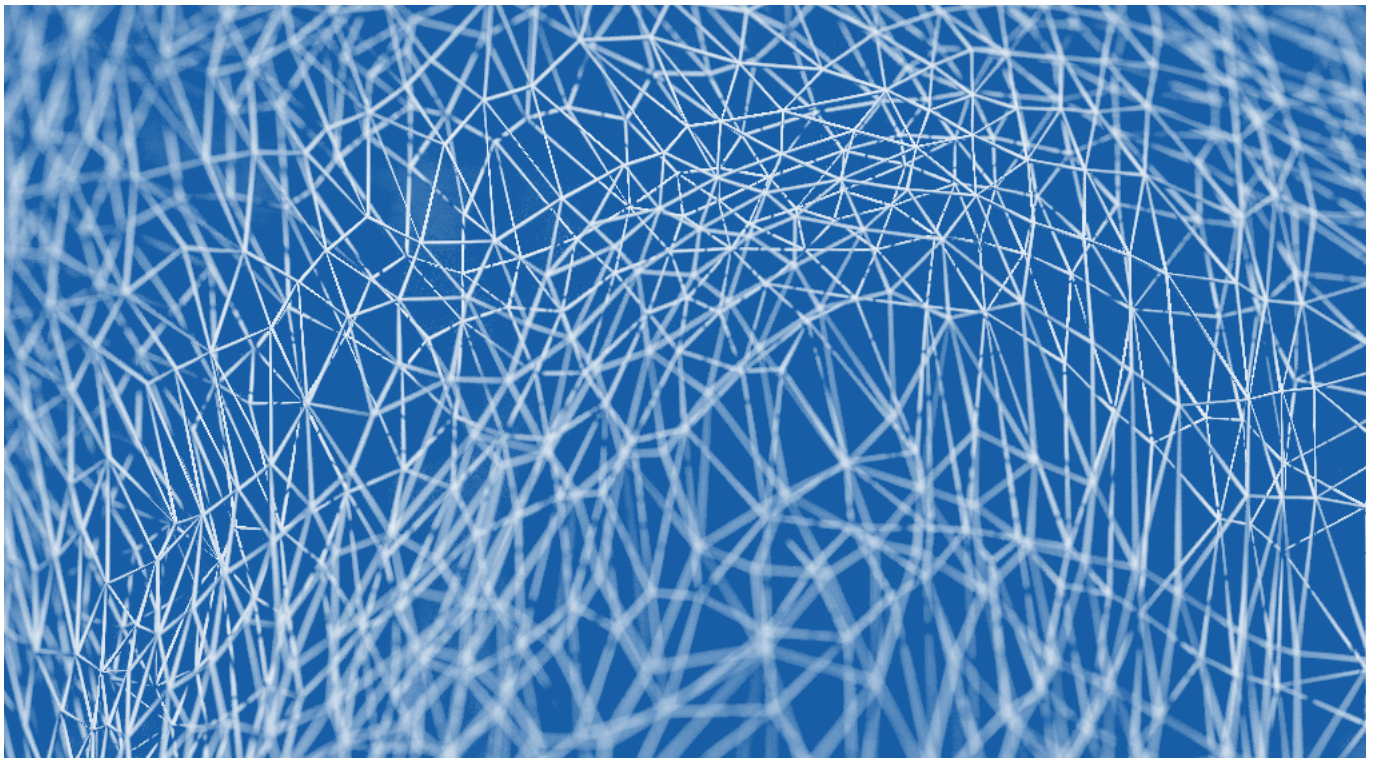


OPPORTUNITY #1

What if we improved our natural internal armour?

FIERCE FASCIA

Gene therapies and advanced nutritional approaches boost the body's natural internal armour, scientifically known as the fascia, preserving biomechanical health over a lifetime.



MEGATREND

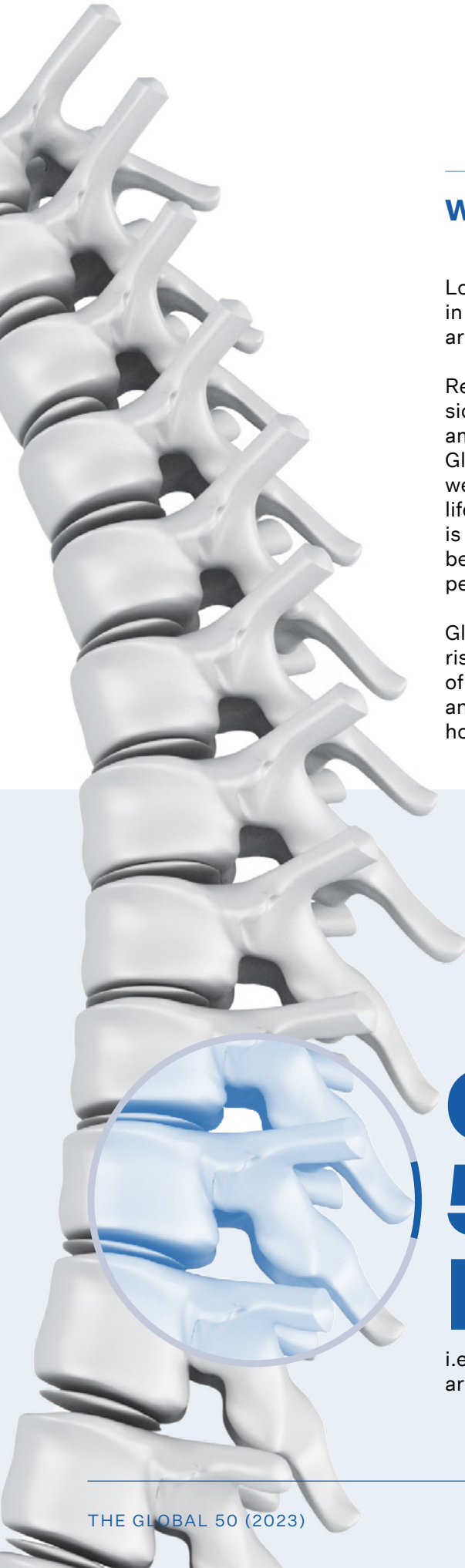
Advanced Health and Nutrition

TRENDS

Genomics
Longevity & Well-being

SECTORS AFFECTED

Consumer Goods, Services & Retail
Data Science, AI & Machine Learning
Financial Services & Investment
Health & Healthcare
Insurance & Reinsurance
Materials & Biotechnology



WHY IT MATTERS TODAY

Longevity and more sedentary lifestyles are contributing to a rise in reported joint and back pain as well as migraines,¹⁷⁷ all of which are conditions that negatively impact quality of life.

Research has found that 42% of adults in Sweden with back pain take sick leave or disability payments, with productivity loss per person amounting to more than \$13,000 during a 12-month follow-up period.¹⁷⁸ Globally, over 570 million people, i.e. 7.5% of the world's population, were affected by back pain in 2021.¹⁷⁹ Partially related to sedentary lifestyles, the annual economic burden of migraines in the United States is some \$78 billion and the associated annual health service costs are between \$8,500 and \$9,500 per individual.¹⁸⁰

Global healthcare spending – both public and private – is estimated to rise by nearly 5% in the period between 2020 to 2040, reaching a value of nearly \$12 trillion by 2040,¹⁸¹ and as populations become more urban and many jobs become even more sedentary, uncovering causes and how to prevent or treat ‘aches and pains’ is becoming more urgent.

**OVER
570 MILLION
PEOPLE**

i.e. **7.5% of the world's population**,
are affected by back pain across the globe

THE OPPORTUNITY

The fascia acts as the body's internal armour, protecting connective tissues, muscles, tendons and ligaments. Research is revealing the role it plays in preventing muscular and joint pain, even migraines,¹⁸² and in maintaining biomechanical strength as we age.¹⁸³ Advanced medical technologies and understanding of the fascia could open new avenues for keeping it healthy, supple and strong throughout life, to preserve overall agility and strength and reduce joint pain.

Gene therapies and novel nutritional approaches can improve the resilience and efficacy of the fascia and radically reduce muscle, ligament and tendon pain and injuries. By boosting fascia health in younger people, these techniques can improve people's overall levels of fitness by facilitating exercise and recovery. In older people, fascia treatments decrease the stiffness, aches and pains associated with ageing, keeping older populations more active and in better health for longer.¹⁸⁴ The overall result is a lower cost burden on healthcare systems and greater lifelong productivity, health and well-being.

BENEFITS

Improved productivity, quality of life and well-being. Reduced costs to health systems.

RISKS

Over-reliance on fascia treatment, causing delayed treatment of other symptoms and potentially exacerbating associated diseases.





Global healthcare spending
is estimated to rise by nearly

5%

in the period 2020 to 2040
reaching a value of

**\$12
TRILLION**

by 2040