

Megatrends 2035

The 6 dramatic forces **shaking up**
every market and driving every
business to **reinvent** itself

Megatrends 2035

Megatrend 1. **EXPONENTIAL INTELLIGENCE**

... business at the speed of thought

Megatrend 2. **GENERATIONAL REMIX**

... older, urban, more different and more personal

Megatrend 3. **ASIAN CENTURY**

... economic shift to east, and volatility everywhere

Megatrend 4. **REGENERATIVE SYSTEMS**

... from climate crisis to net positive impact

Megatrend 5. **MULTIPOLAR WORLD**

... geopolitical tension and the end of globalisation

Megatrend 6. **HUMANITY RISING**

... more purposeful, human, collective progress



In today's volatile and hyperconnected world, business leaders face a daunting challenge: to navigate constant disruption while building future-ready organizations. The familiar rhythms of strategy, planning, and execution have been upended by forces far larger than any single industry or region. These forces—megatrends—are reshaping the world at a structural level, creating both massive risks and unprecedented opportunities.

Megatrends are long-term, transformative forces that are global in scope, cross-industry in impact, and inevitable in their trajectory. From climate change and technological convergence to demographic shifts and urbanization, megatrends are not just fleeting headlines—they are the undercurrents shaping the future of markets, societies, and business itself.

Ignoring megatrends is no longer an option. They influence how people live, what they value, how they consume, how they work, and how economies evolve. For businesses, this means rethinking what they offer, how they operate, and why they exist. Companies that spot these shifts early and act boldly are the ones that leapfrog competitors, shape new markets, and earn the right to lead.

We explore six megatrends with a 10-year perspective, already shaking up every market. They are the disruptive forces that threaten your existence, but equally your biggest opportunities, superhighways to future possibilities, driving innovation and growth. And then we consider what they mean for your industry. How will they drive reinvention? What are the critical actions for business leaders, and the broader mindset to adopt? And who can we learn from?

Ultimately, the question is what will you do as a business leader – now – to create a better tomorrow, to shape the future you want, in which your business can thrive.

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2035

EXPONENTIAL INTELLIGENCE

Megatrend 1. **EXPONENTIAL INTELLIGENCE** ... business at the speed of thought

By 2035, AI will be embedded in every business process. Intelligent systems will generate over 90% of digital content.

The line between human and machine thinking will blur. Exponential Intelligence represents the rapid acceleration of AI, and the convergence of technologies – in particular genomics, robotics, blockchains and energy storage – and new capabilities such as quantum computing.

AI's application are profound, from accelerating new personalised medicines to fighting climate change, and new business models that deliver hyper personalisation.

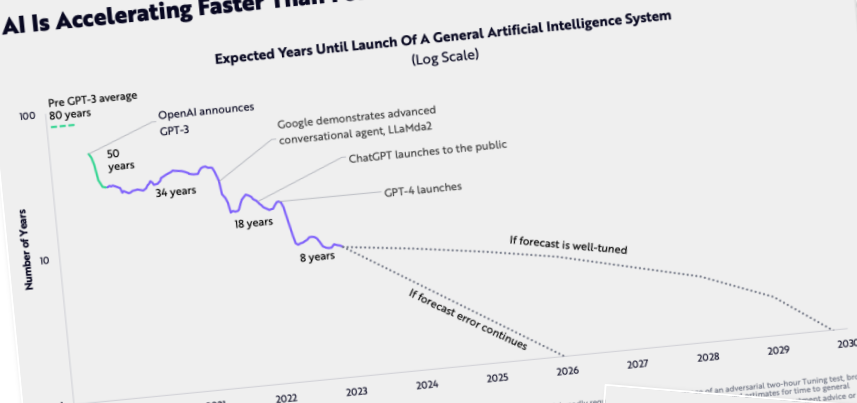
This megatrend signifies a shift from linear progress to exponential possibility, where machines increasingly augment human decisions, also enabling people to add value in new ways. In the future AI will not just support businesses, it will co-create with them.

Companies must embed AI across every core function, from operations to marketing to finance, and develop proprietary models tailored to their domain. Leading firms are reimagining customer experiences through predictive, hyperpersonalised interfaces and training their workforces for human-machine collaboration.

Megatrends 2035

EXPONENTIAL INTELLIGENCE

AI Is Accelerating Faster Than Forecasters Anticipated



Five Innovation Platforms Are Converging And Defining This Technological Era

Public Blockchains

Upon large-scale adoption, all money and contracts likely will migrate onto public blockchains that enable and verify digital scarcity and proof of ownership. The financial ecosystem is likely to reconfigure to accommodate the rise of the rise of **Cryptocurrencies** and **Smart Contracts**. These technologies increase transparency, reduce the influence of capital and regulatory controls, and collapse contract execution costs. In such a world, **Digital Wallets** would become increasingly necessary as more assets become money-like, and corporations and consumers adapt to the new financial infrastructure. Corporate structures themselves may be called into question.

Artificial Intelligence

Computational systems and software that evolve with data can solve intractable problems, automate knowledge work, and accelerate technology's integration into every economic sector. The introduction of the internet and potentially create 10s of trillion dollars of value. At scale these systems will require unprecedented computational resources, and AI-specific compute hardware should dominate the **Next Gen Cloud** datacenters that train and operate AI models. The potential for end-users is clear: a constellation of AI-driven **Intelligent Devices** that provide people's lives, changing the way that they spend, work, and play. The adoption of artificial intelligence should transform every sector, impact every business, and catalyze every innovation platform.

Energy Storage

Declining costs of **Advanced Battery Technology** should cause an explosion in form factors, enabling **Autonomous Mobility** systems that collapse the cost of getting people and things from place to place. Electric drivetrain cost declines should unlock **AI** transform the landscape of cities. **Cost of taxi, delivery, and agriculture**, enabling frictionless the velocity of e-commerce and the exception rather than the rule with large-scale stationary information in energy, substituting generation infrastructure.

Robotics

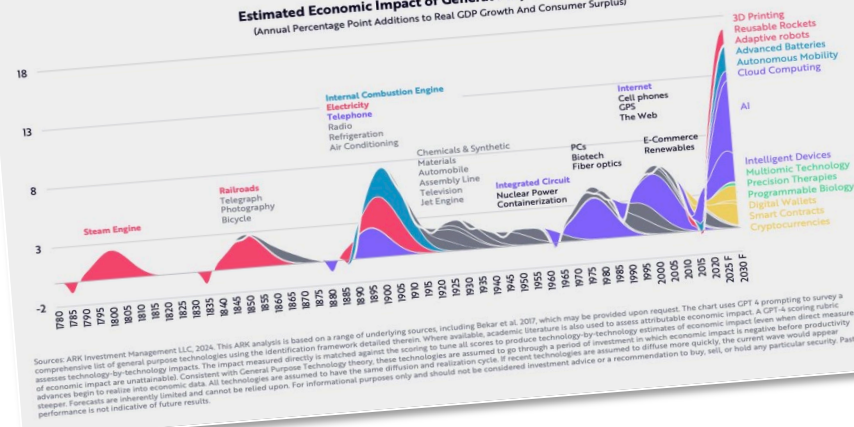
Catalyzed by artificial intelligence, **Adaptive Robots** can operate alongside humans and navigate legacy infrastructure, changing the way products are made and sold. **3D Printing** should contribute to the digitization of precision of end-use parts, but also the resilience of supply chains. Meanwhile, the world's fastest robots, **Reusable Rockets**, should continue to reduce the cost of launching satellite constellations and enable unerringly connectivity. A nascent innovation platform, robotics could collapse the cost of distance complexity with 3D printers, the cost of manufacturing with AI-guided robots.

Multimic Sequencing

The cost to gather, sequence, and understand digital biological data is falling precipitously. **Multimic Technologies** provide research platforms with unprecedented access to DNA, RNA, protein, and digital health data. Cancer care should transform with pan-cancer blood tests. **Therapies** using emerging gene editing techniques that target and cure are diseases and chronic conditions. **Programmable Biology** capabilities, including the design and synthesis of novel biological constructs with applications across industries, particularly agriculture and food production.

Converging Technologies Are Generating A Historic Technological Wave

Estimated Economic Impact of General Purpose Technologies (Annual Percentage Point Additions to Real GDP Growth And Consumer Surplus)





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EXPONENTIAL INTELLIGENCE

Megatrend 1. **EXPONENTIAL INTELLIGENCE** ... business at the speed of thought

Why does it matter?

- AI will contribute over \$15.7 trillion to the global economy by 2035 (PwC).
- 90% of online content is projected to be AI-generated by 2026 (IBM).
- Over 40% of all jobs will be impacted by AI and automation (WEF)

What do we need to do?

- **Apply AI models to core business** activities to radically transform speed and costs, analysis and development
- **Predict and personalise** user interfaces to anticipate customer needs and serve them better and faster
- **Build ecosystem** business models to unlock mutual capabilities that capture the best new opportunities for growth.

Who's doing it?

- **Insilico**: using AI to reinvent the process of drug discovery, development and evaluation, 10 times faster, 100 times cheaper
- **Siemens**: co-developing self-optimising autonomous factories using digital twins and AWS infrastructure
- **Duolingo**: Language learning reimagined with GPT-powered conversational roleplay, adapting instantly to user fluency and goals.

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Megatrends
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GENERATIONAL REMIX

Megatrend 2. **GENERATIONAL REMIX**

... older, urban, more different, more personal

By 2035, society will be older, more urban, more different and personal — and yet also more connected than ever. Businesses must design for diversity, longevity, and identity.

Generation Remix captures the profound social transformation underway: populations are aging rapidly, cities are expanding, and cultural identities are becoming more diverse, fluid, and personal.

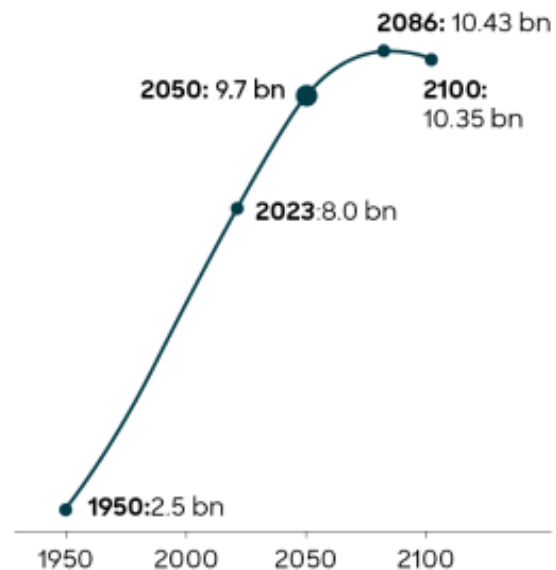
This megatrend is about designing for complexity and individuality — where different generations, values, and needs collide and co-create. It also drives fundamentally different support — older people are living longer with more affluence, for leisure and travel. Pensions will need to last longer, and healthcare costs will inevitably rise. Similarly urbanisation drives the reinvention of many services, from education and entertainment to how communities are built, and the rising power of city states.

Businesses must develop inclusive, intergenerational products and services; personalise offerings based on lifestyle rather than age; and embrace cultural plurality in design and communication. Planners must design cities, homes, and brands for 100-year lives, build inclusive, multigenerational workplaces, and address loneliness, mental health, and community. It is also about embedding cultural and demographic diversity into R&D. This is about treating every customer—and employee—not as a demographic, but as a unique human.

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GENERATIONAL REMIX

Evolution of world population 1950-2100 [bn]

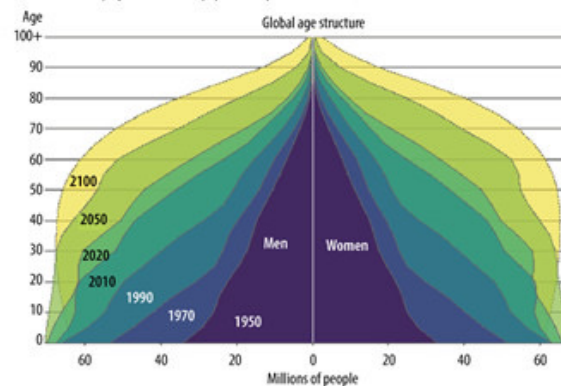


¹ The definition of urban areas follows the definitions that are used in each country as the footnote refers to the "Residential area of inhabitants"

Aging into the future

The huge global increase in the number of people over 65 has big implications for the quality of aging and public policy.

(distribution and projection of world population by sex, 1950-2100)



Source: United Nations Department of Economic and Social Affairs, World Population Division.

Global population characteristics 2050 [%]

Economic origin of inhabitants



Less developed regions
Developed regions

Residential area of inhabitants¹



Rural
Urban

Age of inhabitants



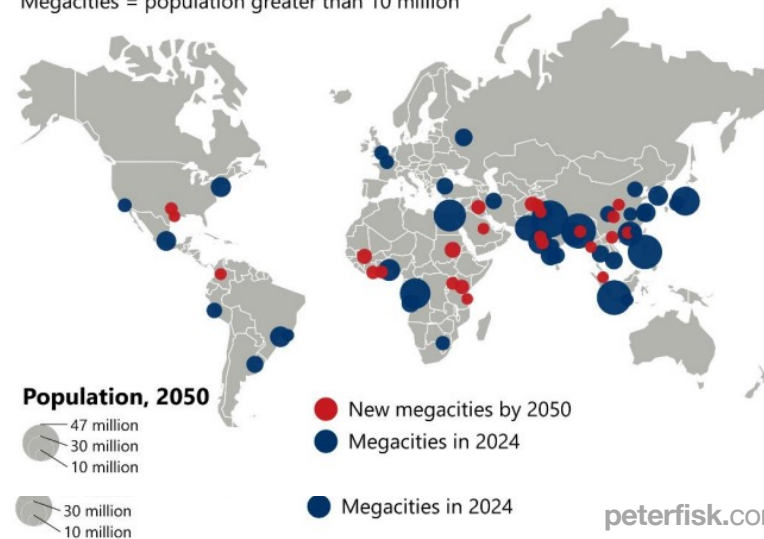
0-19
20-64
65+

Life expectancy at birth



<70
70-80
>80

Megacities = population greater than 10 million



Megatrends
2035

GENERATIONAL REMIX

Megatrend 2. **GENERATIONAL REMIX**

... older, urban, more different, more personal

Why does it matter?

- 20% of global population will be over 60 by 2035, more than under 18
- 68% of the world will live in cities by 2035, and more in single homes
- 90% of global population growth to 2050 will be in Africa and Asia (UN)

What do we need to do?

- **Develop intergenerational products** and services, personalise offerings based on lifestyle and diverse identities
- **Urban planning** to design cities, homes, and brands for 100-year lives, build inclusive, multigenerational workplaces
- **Reinvent urban services**, from education and entertainment to how communities are built, and the rising power of city states.

Who's doing it?

- **Philips HealthSuite:** Cloud-based health platform for remote care, chronic condition monitoring, and aging-in-place solutions.
- **Nestlé Health Science:** Investing in personalised nutrition, gut health, and senior wellness—especially in fast-aging markets.
- **Toyota Woven City:** A prototype smart city in Japan designed for autonomous vehicles, robotic assistance, and aging-friendly living.

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ASIAN CENTURY

Megatrend 3. **ASIAN CENTURY**

... economic shift to the east, volatility everywhere

Asia is the gravitational centre of global growth. By 2035, most middle-class consumers will live in Asia. The region will lead in innovation, consumption, and complexity.

The Asian Century represents the rebalancing of global economic power towards Asia and the Global South. These regions are not just growth markets—they are innovation hubs, cultural trendsetters, and geopolitical forces reshaping the future.

While Asia's huge population with increasing disposable income will increasingly dominate the world's consumer markets, Asia's businesses have also dramatically shifted from cheap imitators of western goods, to leaping ahead in their application of new technologies, new business models, and innovations.

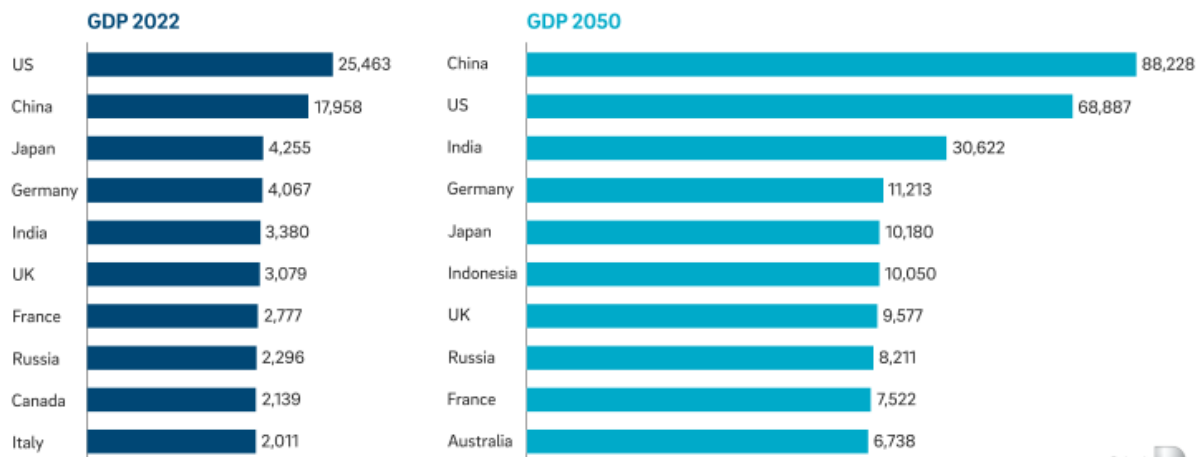
Businesses must do more than export to Asia—they must co-create in and for Asia, localising products for fast-rising middle classes in Tier 2/3 cities, collaborating with Asian startups, and embedding cultural relevance into innovation. India, Vietnam, Indonesia are popular locations for global R&D hubs.

New digital trade corridors (eg RCEP, BRICS+ alliances) are reconfiguring markets. Superapps like Jio and Grab provide easy access to markets, through collaboration with their ecosystems. But with growth, prepare for volatility.

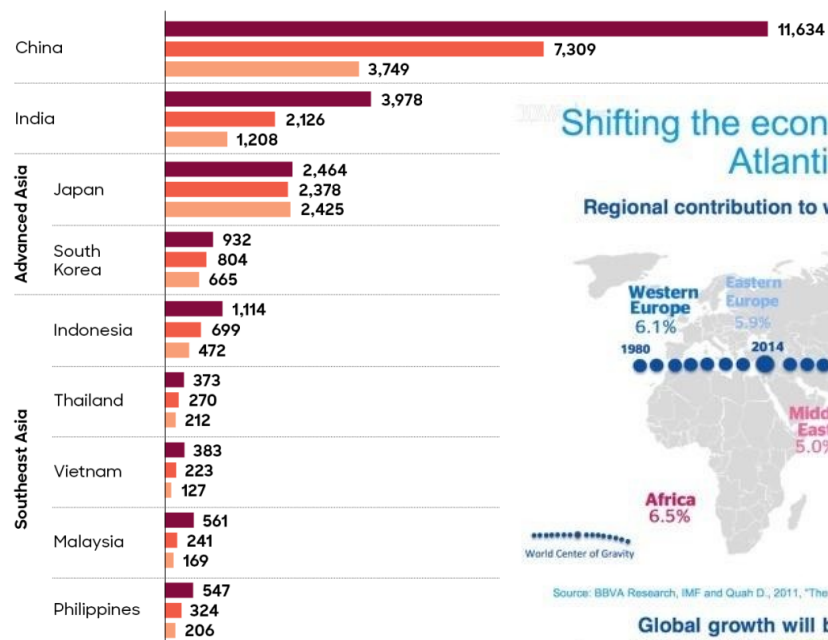
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ASIAN CENTURY

Top 10 countries in terms of nominal GDP in 2022 and 2050 [USD bn]



Sources: Oxford Economics; IMF; Roland Berger



Legend: 2013 (light orange), 2023 (dark orange), 2033 (projected) (dark red)
Source: Roland Berger

Shifting the economic centre of gravity from the Atlantic to the Pacific area

Regional contribution to world growth in the next ten years (%)



Source: BBVA Research, IMF and Quah D., 2011, "The Global Economy's Shifting Centre of Gravity".

Global growth will be concentrated in the Asia-Pacific region, which will account for 76.5% of the increase in GDP between 2014 and 2024.

BBVA RESEARCH



Megatrends
2035

ASIAN
CENTURY

Megatrend 3. **ASIAN CENTURY**

... economic shift to the east, volatility everywhere

Why does it matter?

- Asia will contribute 65% of global GDP growth by 2035 (IMF)
- Over 50% of global consumer spending will be Asian by then.
- 83% of global AI-related patents are filed by Asian companies (Wired)

What do we need to do?

- **Seize the Asian market opportunity**, finding effective ways to access and compete eg Indonesia, Vietnam, tier 2/3 cities, BRIC trade corridor
- **Localise and co-create** with local partners, finding cultural relevance and sourcing and manufacturing locally.
- **Learn from the best Asian companies**, who are typically the most innovative, agile and efficient in the world.

Who's doing it?

- **BYD**: China's batteries to EV giant has become the global leader, and in clean energy too
- **Xiaomi**: Creating consumer electronic products equal or superior to western peers but 90% cheaper
- **LVMH Asia Studios**: Culturally attuned luxury innovation, where Asian consumer no longer want western goods

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REGENERATIVE SYSTEMS

Megatrend 4. **REGENERATIVE SYSTEMS**

... from climate crisis to net positive impact

Climate change is the defining risk and opportunity of our time. But the frontrunners are moving beyond carbon-neutral to climate-positive and nature-regenerating models.

Regenerative Systems is about moving beyond sustainability as damage limitation toward a model that actively restores, replenishes, and reimagines the relationship between business and the planet. With the climate crisis accelerating and ecosystems under pressure, the regenerative economy is a shift from extractive to circular, from carbon-neutral to climate-positive.

The impact however can be even greater when we look beyond carbon – to other materials and resources – in particular, water and biodiversity. It can be greater still when we embrace social and environmental issues together, as they are often systemically connected.

This is when businesses really can reinvent for net positive impact.

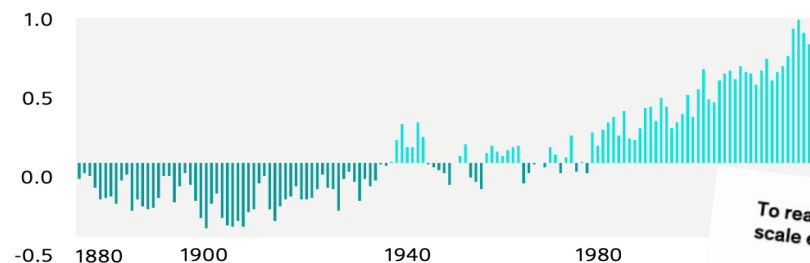
Businesses must transition from compliance to leadership—transforming supply chains into regenerative ecosystems, adopting circular design, and tying executive incentives to sustainability performance. This includes decarbonising supply chains with digital ESG tracking, linking executive pay to sustainability goals, restoring biodiversity and natural capital, and creating planet-positive products and services.

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REGENERATIVE SYSTEMS

Climate change continues

Global annual mean temperature variation (°C)^{d)}

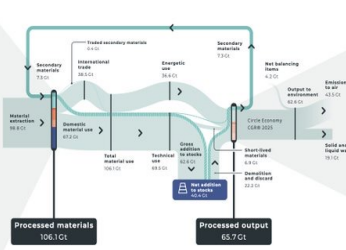
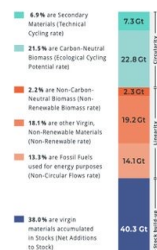


Current policies are insufficient to limit global warming to +1.5° C in this century

^{d)}Source: National Oceanic and Atmospheric Administration (2022), deviation from global 20th century average

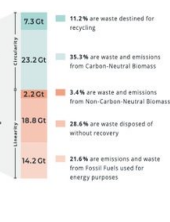
INPUT

Of the 106.1 billion tonnes of processed materials flowing into the global economy:



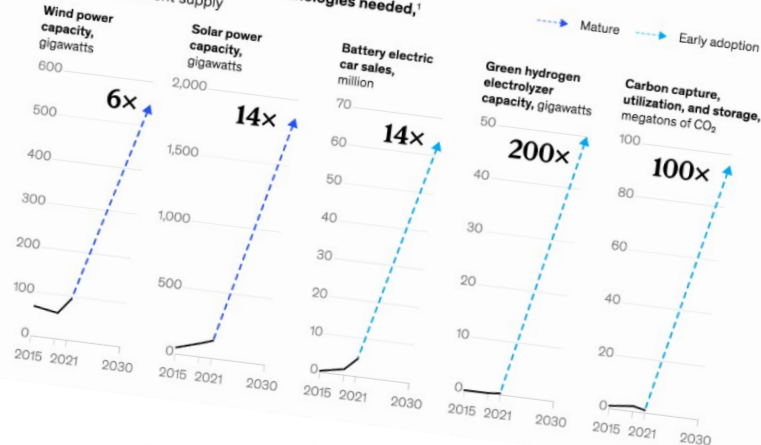
OUTPUT

Of the 65.7 billion tonnes of processed output flowing out of the global economy:

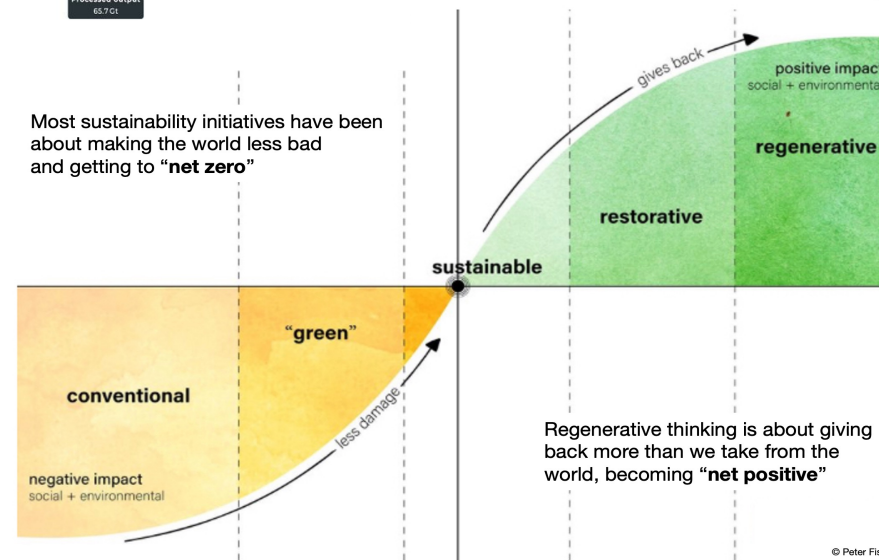


To reach net-zero targets, a set of existing climate technologies would need to scale exponentially by 2030.

Annual deployment of climate technologies needed,¹ multiples of current supply



Most sustainability initiatives have been about making the world less bad and getting to "net zero"



Regenerative thinking is about giving back more than we take from the world, becoming "net positive"



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2035

REGENERATIVE SYSTEMS

Megatrend 4. **REGENERATIVE SYSTEMS**

... from climate crisis to net positive impact

Why does it matter?

- The world's business systems are still only 6.9% "circular" (IPCC)
- Clean energy will be 60% of the global energy mix by 2035 (IEA)
- Embedding the 17 SDGs is worth \$12 trillion, and 380 million jobs (UN)

What do we need to do?

- **Develop regenerative business models**, going far beyond CSR and ESG, circular and net zero, to create net positive impact
- **Think beyond carbon** to embrace other challenges eg biodiversity, water, but also social issues eg equality, fairness, etc
- **Focus innovation on the big problems**, AI to address climate change and disease, to create 40% more food, 50% more energy, in new ways

Who's doing it?

- **Schneider Electric**: Helping cities and factories go carbon-neutral through connected, AI-managed energy efficiency platforms.
- **Interface**: creating net-positive floor tiles that absorb carbon, creating the "factory as the forest"
- **Nubank**: world's fastest growing bank from Brazil, targeting the unbanked, building financial literacy, reducing poverty, and building inclusion.

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2035

MULTIPOLAR WORLD

Megatrend 5. **MULTIPOLAR WORLD**

... geopolitical tension and the end of globalisation

The old model of seamless globalisation is fragmenting.

Economic nationalism, digital sovereignty, and supply chain shocks driven by conflicts and tariffs are reshaping business strategy.

Multipolarity marks the end of the unipolar, globalised world as we knew it. With growing geopolitical tensions, trade fragmentation, and inwards facing economic policies, companies are navigating a world of shifting alliances, digital borders, and regional blocs.

By 2035, over 70% of global trade will occur within regional networks. Data sovereignty regulations will be in place in dozens of countries, and supply chains will be redesigned for resilience, not just cost.

Businesses must nearshore manufacturing, create flexible, modular operations, and navigate complex trade relationships with agility and foresight.

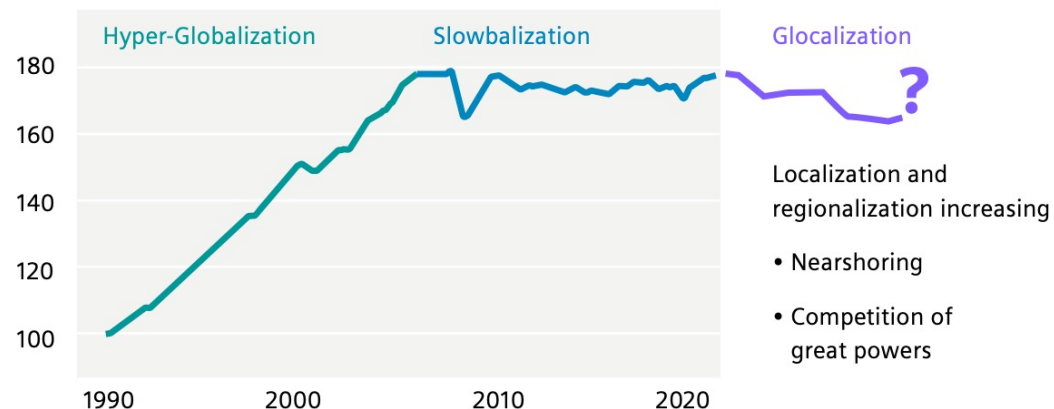
The reinvention challenge is to build resilience without retreat—balancing localisation with global ambition.

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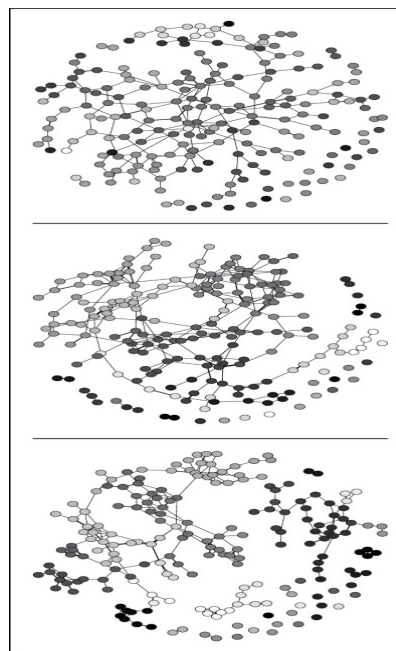
MULTIPOLAR WORLD

From globalization to glocalization

Ratio of global goods traded to global industrial production (Index 01/1991 = 100)^o

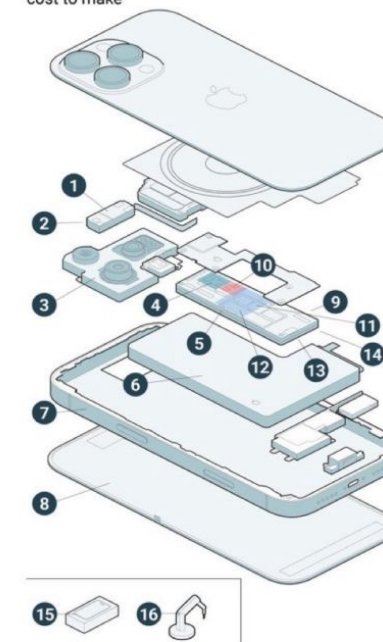


c) Source: Global Trade Alert, Bureau for Economic Policy Analysis



iPhone 16 Pro Max

cost to make



1 Front camera £15 (\$20) Japan	10 Modem and transceiver £21 (\$28) US
2 Biometric sensors £14 (\$19) Austria	11 Memory £13 (\$17) Japan
3 Rear camera £60 (\$80) Japan	12 Processor £34 (\$45) Taiwan
4 Storage £17 (\$22) Japan	13 WiFi, GPS, NFC £11 (\$15) US
5 Circuit board £11 (\$15) South Korea	14 Power management £13 (\$17) Japan
6 Battery £11 (\$15) China	15 Box content £6 (\$8)
7 Frame £14 (\$19) Taiwan	16 Manufacturing and other £43 (\$57) China
8 Display £60 (\$80) South Korea	
9 Radio and power amplifier £22 (\$29) US	
	Total cost £366 (\$485)

Source: TD Cowen



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2035

MULTIPOLAR WORLD

Megatrend 5. **MULTIPOLAR WORLD**

... geopolitical tension and the end of globalisation

Why does it matter?

- Global trade as a % of global GDP has declined since 2008 (OECD)
- By 2035, over 70% of global trade will occur within regional networks
- 84% of global executives now rate geopolitical as their top risk (McKinsey)

What do we need to do?

- **Redesign supply chains for resilience**, agility not cost, nearshoring and partnering closer to customer markets,
- **Diversify your global spread** of markets and operations, to spread risk and be more responsive to change.
- **Address data sovereignty**, and other issues such as IP protection, regulation, cybersecurity, with foresight and influence.

Who's doing it?

- **Apple**: Accelerating iPhone and chip production in India to diversify away from China, including flagship stores in Mumbai and Delhi.
- **Inditex**: Strengthening local production in Europe and the Americas to respond faster and reduce geopolitical exposure.
- **Flexport**: Creating tech tools to reroute and de-risk global supply chains in real-time amid fragmentation and shocks.

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... more purposeful, human and collective progress



A silhouette of a man jumping a child in the air against a sunset background. The man is on the left, reaching up with his arms, and the child is in the air, legs spread wide. The background shows a horizon line with a gradient from orange to blue.

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2035

HUMANITY RISING

Megatrend 6. **HUMANITY RISING**

... more purposeful, caring and collective progress

The most powerful force in business is the human one. Trust, wellbeing, meaning, and social contribution are now core to business strategy.

Humanity Rising is a movement toward putting people and purpose at the heart of business. It reflects a shift from transactional to meaningful work, from shareholder primacy to stakeholder ecosystems, and from short-term profit to long-term wellbeing.

As automation, and specifically AI, takes on the repetitive tasks of many workflows, business need to redesign human roles for more added value. Companies must rewire culture around empathy, trust, and meaning; invest in human-centred leadership; and design work for life, not just productivity.

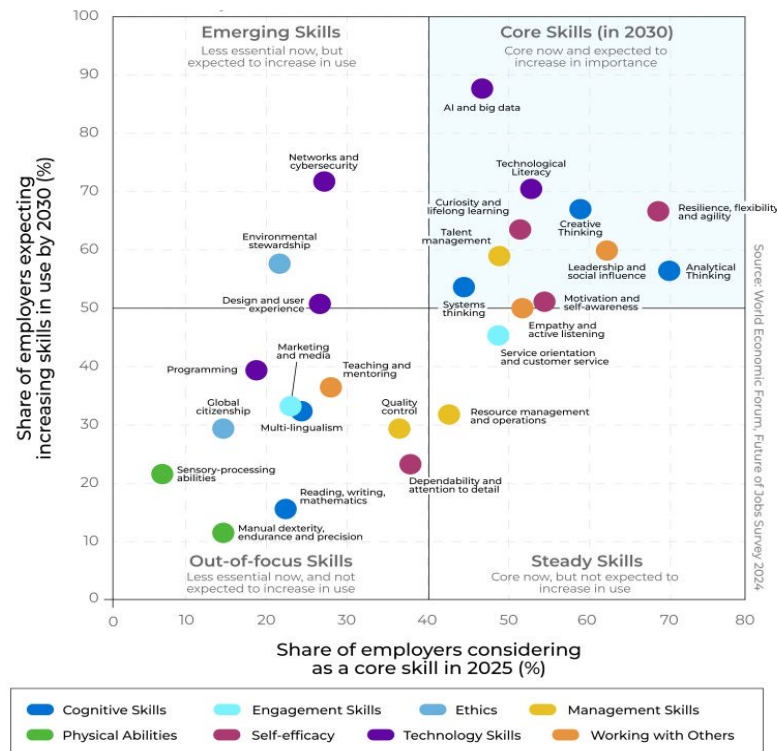
By 2035, businesses that lead on purpose and wellbeing will significantly outperform their peers. Mental health will be a core performance metric, and the human experience of work—flexibility, autonomy, growth—will shape loyalty and innovation.

Humanocracy calls for "organisations as amazing as the people inside them". Microsoft's Satya Nadella recognised this calling for his organisation to be a platform to showcase each employee's unique talents, to let them achieve their ambitions, rather than just being the cog in the works of a corporate machine

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HUMANITY RISING



	Ownership	Team members who possess the autonomy and upside to think and act like entrepreneurs
	Meritocracy	Natural hierarchies that correlate influence with competence and pay with value-added
	Markets	Decision and coordination structures that harness the flexibility and collective wisdom of markets
	Community	Trust-based relationships that foster creativity, commitment, and coordination
	Openness	An environment that encourages curiosity and candor and welcomes unconventional ideas
	Experimentation	Support for past-paced experimentation with new products, methods, and solutions
	Paradox	A capacity to turn "either-or" tradeoffs into "both/and"

Capabilities

Creativity

Value will not come from the old ways, only the new, making imagination and creativity central to tomorrow's capabilities.

Relationships

Everything comes from people; we will need exceptional interpersonal skills to tap into people's talents and collaborate efficiently.

Adaptability

In a rapidly changing world we must be highly flexible, able to deal with ambiguity, work across cultures and shape ourselves to new situations.

Learning

We must be life-long learners with a deep appetite for the new and the ability to continuously gain and develop new knowledge.

Skills

Design

We need to use design thinking to create unique responses to individual responses and develop understanding of how things work well for humans.

Technology

We need to understand the fundamentals of technology and develop areas of specific expertise, especially so we can work well in conjunction with sophisticated machines.

Analysis

There is a massive value in information but it requires insight, perspective and the ability to communicate well to help drive better decisions.

Business

Understanding the fundamentals of business and finance allows all skills to be made more relevant, and enable good ideas to be readily built into entrepreneurial ventures.



Jobs and Skills of the Future Report



Megatrends
2035

**HUMANITY
RISING**

Megatrend 6. **HUMANITY RISING**

... more purposeful, caring and collective progress

Why does it matter?

- Purpose-driven brands grow 2.5x faster than average brands (WARC)
- 77% of GenZ seek meaningful work, and buy meaningful brands (McKinsey)
- AI augmentation is likely to improve human productivity by 40% by 2035

What do we need to do?

- **Create purposeful business models**, that turn purpose into real action and delivers better progress – profitable growth and positive impact.
- **Redesign for human added value** so that technology automates processes, releasing people to achieve more
- **Build organisations as amazing as the people inside them:** empowering, democratic, enabling, caring, dynamic, resilient and daring.

Who's doing it?

- **Danone:** Legally binding mission-driven governance (B Corp), in its shift from food to becoming a health business
- **Salesforce:** Flexibility, purpose, ethics as a platform, mental health through “Success from Anywhere” strategy
- **Mindera:** Portuguese software “made by humans” ... people-first culture fostering innovation through community, autonomy, and trust.



REINVENTION 2035

Embracing the opportunities of change, to shape your future now

Taking the six dramatic forces shaking up every market and exploring what they mean for your industry and business. How can you embrace change to drive radical, profitable progress?



How megatrends drive **business reinvention**

Every industry is being reinvented.

These 6 megatrends create a perfect storm of technological breakthroughs, shifting consumer expectations, environmental imperatives, and economic uncertainty that are driving radical transformation across every sector. The boundaries between industries are blurring, value is migrating to new models and ecosystems, and the winners of tomorrow are being shaped today.

From automotive to insurance, banking to retail, energy to healthcare, established players face existential pressure to change. Legacy systems, slow-moving cultures, and risk-averse mindsets are being outpaced by fast, bold innovators—companies that use data, AI, and platform thinking to deliver better, smarter, more sustainable solutions. Tesla isn't just a car company. Amazon isn't just a retailer. They're both operating systems for the future.

Disruptors are emerging from every corner of the globe—scaling faster, experimenting more aggressively, and harnessing the power of technology to solve meaningful problems.

These next generation leaders are obsessed with what's next. They blend purpose and profit, long-term impact and short-term agility. But incumbents aren't out of the race. The most forward-looking are reinventing themselves, acquiring new capabilities, and unlocking value from their intangible assets—brand, trust, ecosystems, and intelligence.

The next five years will be decisive. Growth will come not from doing more of the same, but from reimagining what's possible—through smart automation, regenerative design, AI-powered personalization, and bold new business models. The winners will be those who stretch their vision, embrace uncertainty, and build for the future—not the past.



Reinventing Automotive

When Lei Jun unveiled the SU7 electric supercar from his Chinese smartphone maker Xiaomi, with comparable features but over 90% cheaper than a Porsche Taycan, we knew the industry was not just being disrupted, but fundamentally reinvented.

No longer just about horsepower and design, the future of cars became about software, autonomy, and energy ecosystems. Disruptors are redefining mobility, while incumbents like VW scramble to catch up.

- **Key Drivers:** EV revolution, autonomy, mobility-as-a-service
- **Disruptors:** Tesla, BYD, Rivian, Waymo, Nio, Xiaomi
- **Incumbents:** VW and Hyundai invest heavily in EVs and batteries; GM pivots toward all-electric by 2035
- **Future Winners:** Tesla remains dominant due to its integrated energy + mobility model; Chinese EV players like BYD are poised to lead on affordability and scale; Apple and Sony may emerge through software-first approaches
- **Growth Areas:** EVs, autonomous fleets, in-car software, subscription mobility
- **Outlook:** \$5T transformation underway; platforms and ecosystems will define winners



Reinventing Banking

In Brazil, David Vélez launched Nubank to free people from bureaucratic, fee-heavy traditional banks. With nothing more than a smartphone and a smile, customers signed up for accounts in minutes. Nubank now serves over 90 million users.

Fintechs are rewriting the rules with embedded finance, AI risk models, and crypto rails. Traditional banks must become platforms, not fortresses. Future leaders will be those who turn trust, data, and user experience into intelligent financial ecosystems.

- **Key Drivers:** Fintech, AI, blockchain, real-time services
- **Disruptors:** Nubank, Revolut, Stripe, Square, DeFi
- **Incumbents:** JPMorgan and DBS investing in AI, APIs, and sustainability-linked finance
- **Future Winners:** Digital-first, customer-centric, embedded finance providers that turn financial services into frictionless tools
- **Growth Areas:** AI-enabled wealth tools, crypto custody, sustainable lending
- **Outlook:** Banking becomes invisible, embedded in lifestyle



Reinventing Construction

Using 3D printing, Icon built a house in 24 hours using a giant robotic arm and a special concrete blend—radically reducing time, cost, and environmental impact.

This illustrates the kind of breakthrough needed in a notoriously slow-moving industry. Innovation now means modular, smart, and zero-carbon construction. Giants like Skanska are investing in digital twins and low-carbon cement. Winners will combine automation, green design, and tech-savvy talent to transform how we build the future.

- **Key Drivers:** Green buildings, modular methods, robotics
- **Disruptors:** Icon (3D printing), Katerra (prefab), CarbonCure (CO2 tech)
- **Incumbents:** Skanska, Bouygues, Holcim, and Turner adopting digital twins and zero-carbon materials
- **Future Winners:** Tech-integrated construction firms that deliver faster, cleaner, cheaper buildings; smart infrastructure providers
- **Growth Areas:** Smart cities, digital twins, sustainable housing
- **Outlook:** \$1T green retrofit and smart build opportunity



Reinventing Energy

Octopus Energy is disrupting utilities by putting customers at the heart of a clean energy revolution—offering dynamic pricing, transparency, and rapid green energy switching.

In an industry long dominated by giant incumbents, it proved agility can win. The transition to net zero, powered by solar, wind, hydrogen, and AI-managed grids, is accelerating. Winners will not just produce energy, but orchestrate energy flows, storage, and demand across intelligent, decentralised networks.

- **Key Drivers:** Decarbonization, decentralization, storage
- **Disruptors:** Tesla Energy, Octopus Energy, Vestas, Climeworks
- **Incumbents:** Shell, TotalEnergies, and BP redefining themselves as energy transition companies
- **Future Winners:** Companies that integrate solar, wind, storage, and smart grids into unified platforms
- **Growth Areas:** Renewables, green hydrogen, carbon capture, virtual power plants
- **Outlook:** Clean energy to dominate mix by 2030; trillion-dollar opportunity



Reinventing Entertainment

When Roblox went public, it revealed that kids were spending more time building and playing in virtual worlds than watching TV.

Entertainment is no longer passive—it's immersive, participatory, and social. New models powered by creators, fans, and algorithms are dominating, as traditional studios play catch-up. Netflix disrupted distribution; now AI and generative content are the new frontiers. Winners will build platforms that blend content, community, and co-creation.

- **Key Drivers:** Streaming, gaming, AI content, creator economy
- **Disruptors:** Netflix, Epic Games, Roblox, TikTok
- **Incumbents:** Disney+ reinvention; Warner Bros. bets on streaming + IP"
- **Future Winners:** Firms that merge entertainment, social engagement, and immersive tech; those who own IP and fan relationships
- **Growth Areas:** AI-generated content, gamified storytelling, AR/VR
- **Outlook:** Creator platforms to become dominant media forces



Reinventing Fashion

Pangaia isn't just a fashion brand—it's a material science company using seaweed fibres and bacteria-based dyes to reinvent sustainable clothing.

Fashion is being reshaped by digital identities, circular design, and transparent supply chains. Fast fashion disruptors like Shein use real-time data and micro-inventory, while luxury players are experimenting with resale and digital fashion. Future winners will merge purpose with personalization, creating garments that are smart, sustainable, and story-driven.

- **Key Drivers:** Sustainability, digital fashion, circularity
- **Disruptors:** Shein, ThredUp, Pangaia, DressX
- **Incumbents:** LVMH and Zara building closed-loop supply chains and digital experiences
- **Future Winners:** Brands that mix identity, impact, and innovation; digital-native and circular-first businesses
- **Growth Areas:** Resale, AI design, bio-materials, virtual clothing
- **Outlook:** Fashion shifts from volume to value, driven by tech + conscience



During the COVID-19 pandemic, BioNTech—once a little-known biotech firm—partnered with Pfizer to deliver a vaccine in record time using mRNA technology. It was a moonshot moment.

Healthcare is being reinvented through genomics, AI, and patient-centric platforms. Startups like Tempus and Babylon offer predictive care and digital diagnoses, while incumbents digitize clinical pathways. Future leaders will move from treating illness to preventing it—personalized, predictive, and precision-driven.

- **Key Drivers:** AI, genomics, personalized medicine
- **Disruptors:** Tempus, BioNTech, 23andMe, Babylon Health
- **Incumbents:** Pfizer, Novartis and Roche embed AI across drug discovery and diagnostics
- **Future Winners:** Companies delivering preventive, digital, and personalized care at scale
- **Growth Areas:** AI drug discovery, wearable diagnostics, gene therapies
- **Outlook:** From reactive to proactive care; multi-trillion-dollar ecosystem



Lemonade turned heads by settling some claims in under 3 seconds, using AI and behavioural economics. It proved insurance doesn't have to be slow, opaque, or distrusted.

Climate volatility and shifting lifestyles demand real-time, proactive coverage. Incumbents like Munich Re are adapting with prevention-as-a-service. The winners will anticipate, not just insure—embedding risk reduction, AI insights, and customer trust into everything.

- **Key Drivers:** Risk prevention, personalization, AI pricing
- **Disruptors:** Lemonade, Zego, FloodFlash, Trōv
- **Incumbents:** AXA and Munich Re building smart risk platforms and climate resilience tools
- **Future Winners:** Insurers who evolve into risk-reduction partners powered by real-time data
- **Growth Areas:** Parametric insurance, embedded models, prevention-as-a-service
- **Outlook:** Reinvention from safety net to proactive value provider



Reinventing Manufacturing

Relativity Space is using 3D printing to make rockets—95% fewer parts, far faster iterations.

It's a symbol of manufacturing's new age: flexible, intelligent, and software-defined. Automation, IoT, and AI are transforming everything from design to delivery. Legacy players like Siemens and GE are embracing digital twins. The factories of the future will be smart, sustainable, and continuously learning.

- **Key Drivers:** Industry 4.0, robotics, sustainability
- **Disruptors:** Relativity Space, Xometry, Vention
- **Incumbents:** Siemens, GE, and Bosch digitizing supply chains and factory floors
- **Future Winners:** Agile, hyper-automated, sustainable manufacturers with digital cores
- **Growth Areas:** Smart factories, additive manufacturing, nearshoring
- **Outlook:** \$1T+ productivity gains from intelligent manufacturing



Reinventing Retail

Shopify gave small businesses global reach with a few clicks—and now powers millions of storefronts.

Retail is shifting from stores to ecosystems, driven by social commerce, AI curation, and instant fulfillment. Amazon, Temu, and ThredUp are reshaping expectations. Incumbents must combine digital agility with deep human insight. The next winners will create seamless, personalized, and values-based retail experiences.

- **Key Drivers:** Omnichannel, AI personalization, circularity
- **Disruptors:** Amazon, Shopify, Temu, ThredUp
- **Incumbents:** Walmart and Target investing in AI, last-mile, experiential retail
- **Future Winners:** Ecosystem retailers blending physical, digital, and sustainable offerings
- **Growth Areas:** Social commerce, live shopping, AI recommendation engines
- **Outlook:** Retail = technology; brand trust + data + delivery = competitive edge



When OpenAI released ChatGPT, it stunned the world—and ignited an AI arms race.

Technology is the force multiplier of every transformation. AI, quantum, chips, and decentralised platforms are reshaping what's possible. Disruptors like DeepMind and Anthropic push the frontiers, while incumbents like Microsoft integrate AI into everything. The winners will be ecosystem architects, building the foundations of a superintelligent, secure, and inclusive digital world.

- **Key Drivers:** AI, cloud, quantum, cybersecurity
- **Disruptors:** OpenAI, DeepMind, Anthropic, Nvidia
- **Incumbents:** Microsoft and Google integrating GenAI across platforms
- **Future Winners:** Platform-native firms owning data, chips, and AI layers
- **Growth Areas:** GenAI, autonomous agents, AI operating systems
- **Outlook:** Tech drives all other industries; \$10T+ value shift imminent



Starlink launched satellites fast enough to beam high-speed internet to war zones and remote villages alike. It showed how agile, hardware-software integrated telecom can leapfrog legacy infrastructure.

With 5G, edge computing, and AI, telecom is evolving into a platform for everything—especially B2B. The leaders will connect not just people, but machines, data, and intelligence.

- **Key Drivers:** 5G, private networks, AI-managed ops
- **Disruptors:** Starlink, Rakuten Mobile, Helium Network
- **Incumbents:** AT&T, BT, and Orange reposition as digital service providers
- **Future Winners:** Providers offering integrated connectivity, intelligence, and cloud-edge infrastructure
- **Growth Areas:** Satellite internet, B2B 5G, telecom-as-a-platform
- **Outlook:** Telcos reinvent as enablers of digital society



Building a megatrend mindset

What the 6 megatrends share is a combination of inevitability and complexity.

They unfold over years, even decades, but their effects are accelerating. They create new winners and losers, and they require a mindset that is radically different from the one that dominated business in the past.

Traditional business thinking is rooted in linear assumptions, efficiency optimization, and incremental growth. But megatrends don't follow linear rules. They interact with one another in unpredictable ways. They often create inflection points—sudden, nonlinear changes—that disrupt even the most well-defended industries.

Just consider how the fusion of mobile technology, social platforms, and AI enabled the rise of entirely new business models like Uber, and then TikTok which is as much about entertainment and shopping as networking. And over the last 18 months, AI platforms like ChatGPT have accelerated rapidly to challenge the very existence of the likes of Google.

In this environment, the most dangerous mindset is one of stability and control. The world no longer rewards those who cling to certainty or simply extrapolate the past forward. Instead, it favours those who embrace perpetual reinvention—those who can sense, adapt, and act at the speed of change.

To do that, leaders need to cultivate what we might call a “megatrend mindset”—a deep awareness of the forces reshaping the world, combined with the humility to question assumptions, the curiosity to explore what's emerging, and the courage to make bold moves before the path is clear.



What Is a Megatrend Mindset?

A megatrend mindset is not just a set of insights or predictions—it's a new operating philosophy for how leaders think, decide, and lead in uncertainty. It is defined by several key shifts:

- **From short-term to long-view thinking:** Leaders must look beyond quarterly targets and focus on building future-fit businesses. This means identifying long-term opportunities and investing in capabilities that align with where the world is going—not just where it is now.
- **From control to navigating complexity:** Instead of trying to manage complexity away, leaders must learn to navigate it. This includes using systems thinking, scenario planning. Strategies become more directional and agile, as ambiguity and uncertainty are part of normality.
- **From optimisation to reinventing everything:** Efficiency alone won't drive tomorrow's growth. Reinvention does. Leaders must be willing to rethink their business model, reshape their value proposition, and reimagine their entire organisations and ecosystems for how they deliver impact—over and over again.
- **From fixed expertise to dynamic learning:** Expertise is becoming perishable. What matters more is learning agility—the ability to learn, unlearn, and relearn faster than the pace of change. A megatrend mindset fosters a culture of exploration, experimentation, and continuous growth.
- **From reactive to proactive transformation:** Waiting for change to hit before acting is a losing strategy. The megatrend mindset pushes organizations to lead change—to shape emerging markets, experiment with new models, and continually challenge their own relevance.



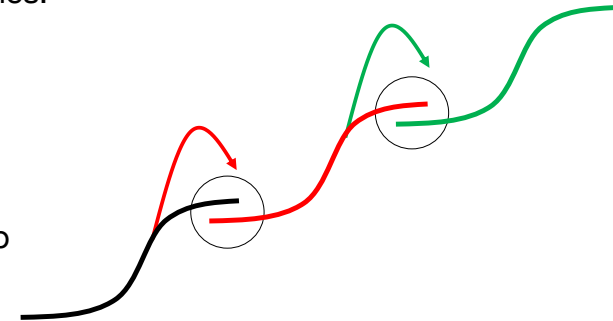
Why This Mindset Matters Now

The world is entering a new era where change is not just fast—it's relentless.

As technologies compound, environmental pressures intensify, and social expectations shift, the gap between what businesses are and what they need to become is growing wider. Those that fail to evolve will fall behind. Those that embrace change will define the next generation of value creation.

Companies like DSM have learnt to continually reinvent themselves – from Dutch coal mining to chemicals to lifesciences – or Fujifilm – from camera film to medical imaging to cosmetics and personalised medicines.

Relentless reinvention ...
growing with the s-curves of
market change, and then
reinventing before you have to



India's Jio superapp was born out of Reliance, a petrochemical giant seeking to diversify, beyond industrial markets. It built a lifestyle brand, built an ecosystem of connected services, and then a payments platform, to capture the wallets of a billion consumers.

Even legacy giants like Microsoft and Schneider Electric have transformed themselves by aligning deeply with sustainability, cloud, and AI megatrends.

The lesson is clear: Reinvention is not a one-off event. It is a mindset, a discipline, and a continuous act of strategic courage.

A Megatrend Mindset applied to business is in reality a Reinvention Mindset.



For leaders looking to build this mindset into their organisation, here are some actions to consider:

- **Scan broadly, think deeply:** Build a habit of horizon scanning—actively tracking megatrends across sectors, geographies = then connect the dots to your business.
- **Reimagine your core assumptions:** Regularly challenge the core beliefs that underpin your strategy. Ask: What if they're no longer true?
- **Build strategic foresight capacity:** Equip teams with tools like scenarios, futures thinking, and trend mapping to make uncertainty a source of advantage.
- **Invest in transformative innovation:** Go beyond incremental improvement. Explore bold ideas, fund experiments, and build partnerships at the edges of your ecosystem.
- **Develop future-fit talent:** Prioritize skills like creativity, critical thinking, and digital fluency—traits essential for navigating complexity.
- **Lead with purpose and resilience:** Anchor your organization in a clear purpose that aligns with societal needs, while building the agility to adapt as the context changes.
- **How will you lead your future?**

In a world where megatrends are reshaping everything, the biggest risk is not disruption—it's irrelevance. The future will not be inherited by the largest or the strongest, but by those who are the most adaptable, visionary, and bold. Developing a megatrend mindset isn't optional—it's essential.

For business leaders, this is a moment of truth. Will you merely react to change—or lead it? Will you wait for the future to arrive—or help shape it?

The answer will define not just your next quarter, but your next decade.

Welcome to the age of reinvention.

About Peter Fisk

Peter Fisk is a global thought leader – a bestselling **author**, expert **advisor** and keynote **speaker**. He works with **business leaders** to reimagine their markets and strategies. He brings together the best in **strategy and leadership**, growth and innovation, business models and sustainability, brand and customer thinking to **make sense of change**, and **create better futures**.

He leads **GeniusWorks**, an innovative business accelerator, based in London, and is professor of leadership, strategy and innovation at **IE Business School** in Madrid, where he is responsible for executive programs. He also works independently and with other business schools, including IMD, Harvard and CEIBS in Asia. He was **Thinkers50** Global Director, founded the annual European Business Forum, and publishes the monthly "Fast Leader" magazine.

Peter's business career was forged in a superconductivity lab deep under the Alps, accelerated by managing high-flying **brands** like Concorde, shaped by working on strategy and innovation in companies in North America and Asia, evolved by leading a **digital start-up**, and formalised in his role as **CEO** of the world's largest marketing network. He then created GeniusWorks to work more flexibly with business leaders and their teams – from inspiring **keynotes** to strategy **workshops** for executives and boards, facilitating innovation **projects**, and much more.

He has over 30 years of practical business experience, working with more than 300 companies in over 55 countries ... from **Adidas'** growth into new markets to **Asahi's** consumer-centric innovation, **Cartier's** redefined luxury and **Coca Cola's** growth strategy, **McKinsey's** leadership development to **Microsoft's** new approach to strategic innovation, **P&G's** direct to consumer strategy and Pfizer's future scanning, **Santander's** future bank vision and **Sompo's** digitally-minded insurance leaders, **STC's** strategic growth and **Suntory's** brand building, Takeda's patient-centric healthcare and **Tata's** growth as a global business, **UN's** sustainable innovation projects, and **UNSSC's** global leadership program.

His latest book "**Business Recoded**" challenges leaders to have the courage to create a better future, harnessing the opportunities of a post-pandemic world, through **7 shifts** built on deep dives with 49 of the world's most inspiring business leaders today. It is shortlisted for CMI Business Book of the Year, and was reviewed by the Financial Times with "Wow. The book you have to read now".

He has written **9 books**, translated into **35 languages**, also including "Business Genius" fusing the brains of Einstein and Picasso to ask how would they do business today. "Creative Genius" is inspired by the border-crossing creativity of Leonardo da Vinci, "**People Planet Profit**" focuses on how to innovate with purpose for positive impact, while the award-winning "**Gamechangers**" learns from the world's most innovative companies, big and small, to develop new strategies for growth.



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Keynotes and workshops

Here are 5 examples of Peter Fisk's most popular topics for business leaders and managers - which can be customised to your industry, organisation, audience, and to focus on specific topics.

They can be a 60-90 min keynote, or 1-3 day executive program, depending on your needs.

Each builds on a bestselling book, enhanced with the latest concepts and new case studies from around the world.



Peter Fisk is a global thought leader, author of 8 business books, a business school professor, and 30+ years experience working with over 250 companies, in 50 countries.

Peter Fisk brings to life the key topics with deep insight and inspiration, building on practical case studies from around the world, and the best tools for implementation.

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- Markets, megatrends, and metaverses
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 - Making the shift, mindset and practice
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 - C2C not B2B2C, digital and social
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 - Gamechangers: who, what, how, and why
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Online resources

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250 Companies

% Arabica – Asian minimalism, African coffee roastery, and Arabic meeting place

"% Arabica is about my love for coffee, design, and seeing the world" says Ken Shoji, founder and CEO of % Arabica. Ken's story began in Tokyo, although I found him in Kuwait. "My father was the owner of a manufacturing and trading company, and together with his frequent business trips, they would take me overseas whenever possible – ultimately helping to inspire my love of multiculturalism, design, and architecture."

Read more about % Arabica >

& Other Stories – Where women curate their own personal style

& Other Stories headquarters in Stockholm are surprisingly low-key. Located on a quiet street in a residential part of the city, it's a far cry from the vision of ultra-hip Swedish cool that H&M and its other brands seek to project on the world. Unlike Zara's portfolio of fashion brands that target different ages and attitudes, H&M's portfolio is more a collection of different lifestyle concepts. More interesting, and distinctive.

Read more about & Other Stories >

1Atelier – Personalisation becomes the new luxury

1Atelier is reinventing bespoke luxury accessories for the 21st century, helping consumers to create exquisitely handcrafted handbags, and more.

Read more about 1Atelier >

23andMe – The \$99 DNA profile could change lives

23andMe can transform your DNA into a personalized health and wellness plan, based on your genetic needs, how you live, and what you want.


Read more about 23andMe >

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100 Leaders

Ali Parsa – Creating Babylon's AI-enabled digital healthcare as "the biggest doctor's brain in the world"

Ali Parsa is founder and CEO of Babylon, the revolutionary artificial intelligence and digital health company. Babylon's mission is "to put an accessible and affordable health service in the hands of every person on Earth."

Read more about Ali Parsa >

Andy Puddicombe – The English-born Buddhist monk who created Headspace, the world's leading mindfulness business

Headspace was created with one mission in mind: to improve the health and happiness of the world. Launched in 2010, it was one of the first meditation apps, and now reaches more than 65 million users in 190 countries. It is committed to advancing the field of mindfulness through clinically-validated research

Read more about Andy Puddicombe >

Angela Cretu – Leading a revolution in women's beauty by women

"We believe in a better world for women, which is a better world for all. We believe everyone is equal and we champion gender equality. We speak up and speak out on issues that matter to our communities; supporting causes that help women's health and wellbeing."

Read more about Angela Cretu >

Anne Wojcicki – Decoding the human genome and recoding the future of personalised healthcare with 23andMe


Anne Wojcicki went from Wall Street analyst who realised that data was the future of healthcare, to healthcare entrepreneur who championing consumer DNA analysis to the point where personalised medicines are now possible. After years of research and industry regulation, she is transforming the future of healthcare, and helping us live longer, healthier lives.

Peter Fisk

Business catalyst. Keynote speaker. Expert advisor.

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Sustainable Futures Project



The **Sustainable Futures Project** brings together the world's best ideas and insights, resources and toolkits, on the fast-evolving topic of business sustainability, specifically focused on helping business leaders embrace and implement it in their organisations. It is supported by a range of world class keynotes, seminars, workshops, consulting approaches and executive development programs, led by global expert **Peter Fisk** and supported by a portfolio of international partners. The content is structured as below but can be customised into any format, and supported by additional content and case studies, depending on audiences and objectives.

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Purposeful Business

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Value Creation

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Sustainability Drivers

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Quantifying Sustainability

Case Studies

Tools

Training

Peter Fisk is a global thought leader, award-winning author and expert advisor, on the future of business ... leadership and strategy, innovation and marketing ... Explore his new insights and ideas, events and services ... Inspiring you to create a better future, and start delivering it today.

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