State of food habits

A baseline of how consumers eat today

June 2026

About this report

- This **inaugural report on the state of food habits** has been developed by The Consumer Goods Forum's (CGF) Healthier Lives Coalition in collaboration with Bain & Company.
- Our multi-year ambition is to build a **deeper understanding of barriers to healthy eating**, and to explore how the industry can better support healthier choices in everyday life.
- This first report establishes **a baseline on where and how consumers' meals are sourced today both at-home and out of home** and examines the extent to which current food options meet consumers' evolving needs.
- In subsequent reports, we will **go deeper on the diverse forces shaping the future of food** such as future consumer aspirations, food tech, AI impact, regulation and science.

We will go deeper on the diverse forces shaping future food habits in subsequent reports

Two disruptions covered in this report that are shaking up how consumers think and act

01 Consumer behaviours

- 1 **GLP-1 adoption**
- Convenience
- UPF backlash
- Health & wellness
- Globalisation of palates

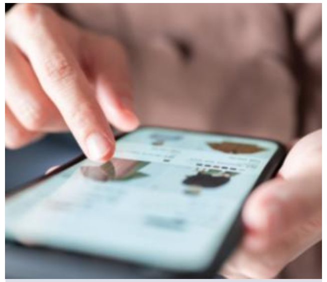
02 Demographic & macro trends

- Demographic changes
- Financial pressures
- Lifestyle influences
- Nutritional needs
- Climatic displacement

03 Food technology

- Alternative proteins
- Nextgen ingredients
- Production & manufacturing innovation

04 AI impact



- 2 **AI as dietary co-pilot**
- Agentic commerce

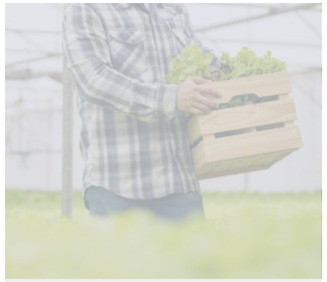
05 Regulation & policy

- New dietary guidelines
- Sustainability regulation

06 Scientific developments

- Microbiome science
- Precision fermentation
- Personalised nutrition science

07 Supply chain resilience



- Climate resilience crops
- Circular farming
- Future-proof supply chains
- Local/ global sourcing resilience

This report leverages research from Bain's Consumer Lab

BAIN & COMPANY
CONSUMER LAB

Bain research			Sample	Timing	Markets
Food & Grocery Shopper Pulse	• Meal sourcing at home & out of home • Grocery spending behavior • In-store grocery shopping experience	• Online grocery shopping experience • Private label • Gen AI in Food	**~7,000** shoppers, nationally representative	**Feb 2026** latest wave Longitudinal / every 12 months	
Consumer Pulse	• General consumer sentiment • Personal finances & spending • Identity & values	• View on AI • Free time • Health & Wellness • ESG & Sustainability	**~10,500** consumers (~9,000 in Europe, ~1,500 in the US)	**May 2026** latest wave Longitudinal / every 6 months	
GLP-1 Survey	• GLP-1 awareness and usage • User profile and engagement • Future adoption trends	• Impact on behavior and spending	**~6,400** consumers (~4,400 in the US, ~1,000 in the UK & Germany each)	**Jan 2026** latest wave Longitudinal / every 12 months	
At-home Meals Sentiments Survey[1]	• Ready meals perceptions • Ready-made ingredients perceptions • Solo eating		**~480** consumers (~160 in the US, ~150 in the UK, ~170 in France)	**June 2026**	

Note: (1) Qualitative survey with free-text responses, categorized using AI.

Key messages (1/3)

Most meals are consumed **at-home,** with **home-cooking** being the most typical preparation method

- **~70-80% of meals are consumed at-home,** with scratch cooking accounting for around half of at-home meals. Consumers report a **desire to do more scratch cooking** due to perceived **health benefits** but also to manage costs, quality and control over ingredients.
- However, **busy lifestyles are also driving demand for convenience**: one in three at-home meals involves no cooking at all, relying instead on **ready meals or food delivery**. Consumers' view of the health and quality of these meal solutions **vary significantly by type of solution.**
- Despite their prevalence (20% of at-home meals) **one-third of consumers would like to reduce ready meal consumption, due to health concerns around nutrition & additives.**
- **Restaurant delivery is a meaningful alternative to home cooking**, accounting for one in ten at-home meals. Consumers often choose food delivery over ready meals to access **specific cuisines** and **restaurant quality** that ready meals do not consistently replicate.
- **Solo eating further reinforces demand for healthy and convenient solutions**. Around 40% of respondents say they eat mostly solo when at-home, prioritising options that are **both quick and nutritious.**

Key messages (2/3)

Consumers source meals in different ways, always making trade offs between health, convenience, quality, and cost

Many consumers view private label as having products they can trust for quality and taste.

- Half of consumers view private label as **both more affordable** and having **quality/taste as good or better than national brands.**
- A growing share of shoppers are buying **premium / specialty private label** lines which are **chosen for quality more often than affordability**, with **exclusivity playing a meaningful role.**
- **One in ten** choose private label because they view it **as healthier**.

~20-30% of meals and 20%-40% of food budgets are eaten out of home. Despite this, one third of consumers report a desire to cut back on restaurant spending due to cost-of-living pressures.

- **There is variation across markets on restaurant spending:** approximately ~40% of food budgets is spent on restaurants in the US, ~35% in the UK, ~30% in France, and ~20% in Germany.
- **One third of consumers report a desire to reduce restaurant spending in response to ongoing cost-of-living pressures**. In the US, restaurant prices have increased at roughly twice the rate of grocery prices, reinforcing the shift toward eating at-home.

Key messages (3/3)

Diverse forces will shape **how consumers are informed and make food choices** in the future

By 2030, an estimated one in three Americans and one in eight Britons will have used a GLP-1 therapy. Spend data indicates that active GLP-1 users reduce fast-food spend by ~5% and grocery spend by ~3–4%.

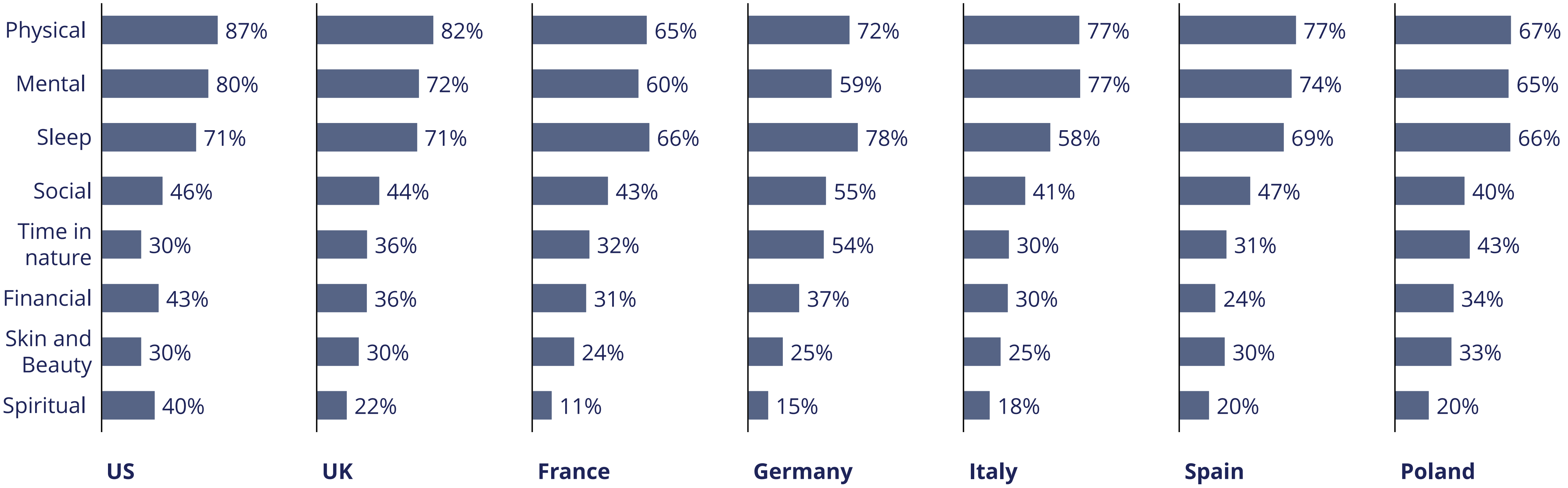
- Bain's analysis suggests **GLP-1 adoption reduces anticipated 2030 category growth in bread & baked, desserts, confectionery & cookies, carbonated beverages, grains including pasta, and salty snacks.**
- Conversely, there will be upside **for meal replacement products, vitamins, fresh fruit and vegetables, and poultry and fish.**
- **Today, some consumers stop taking the medication** (lapse rates are ~40% by end of year 1 in the US, and ~17% in UK) and **most weight is typically regained** over 1-2 years.
- Beyond the five-year horizon, reduced side effects, and lower prices could bring **usage mainstream** through **increased and sustained adoption and reduced lapse rates**. This would materially affect category spending, with full long-term impact yet to be clear.

Approximately half of consumers already use digital tools (including AI) for food planning and shopping.

- Of **consumers who use AI tools, 40% use them to evaluate nutritional information and dietary guidance**, ~30%-40% to compare food brands, ~45%-50% for recipe inspiration, and 35%-45% for checking prices and promotions.

Consumers think about health holistically including physical, mental, sleep, social, financial and spiritual

Aspects considered when thinking about health
% respondents, 2025

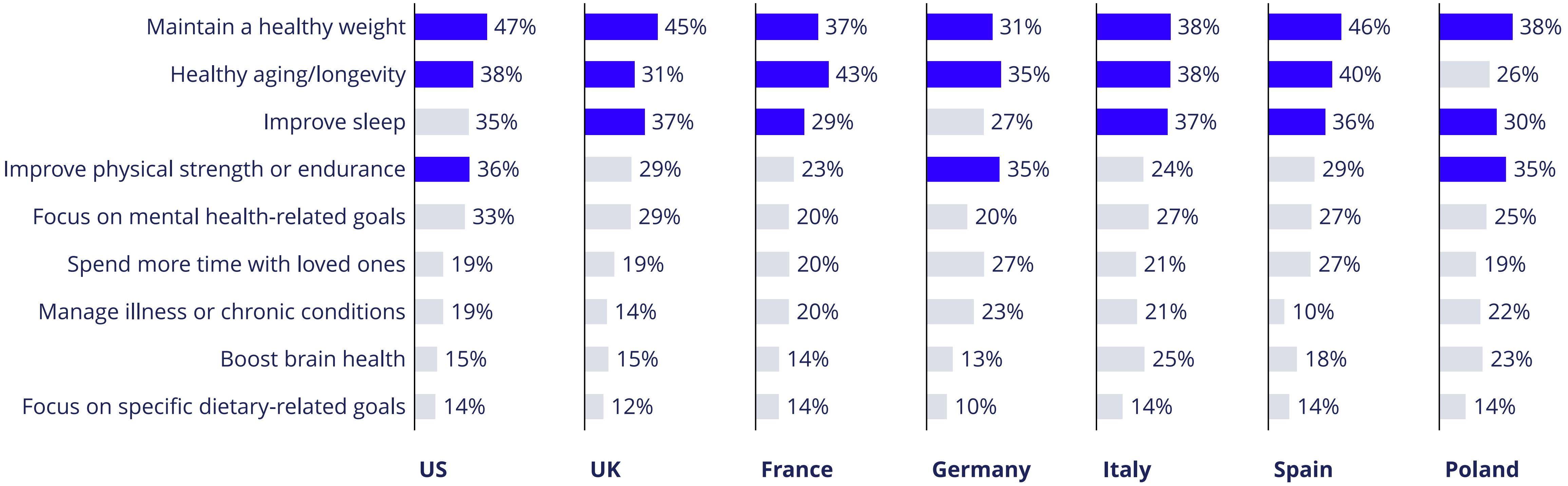


Source: Bain Consumer Pulse Survey October 2025

Health means different things to different people but maintaining a healthy weight is a top health goal for consumers in all markets

Current health and wellness goals
% respondents, 2025

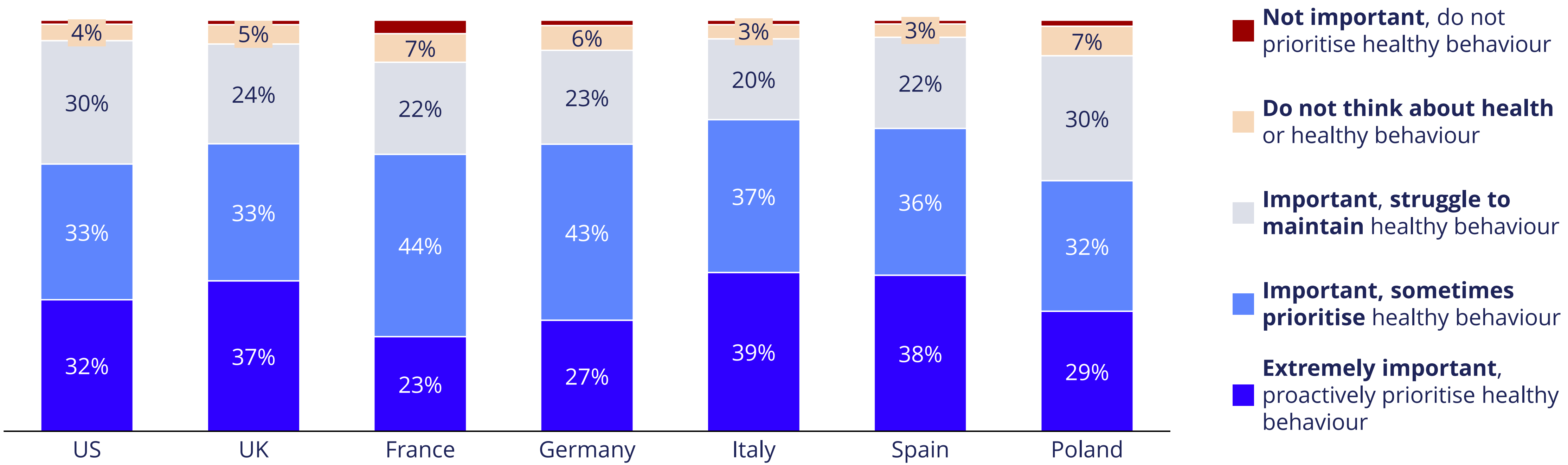
Top 3 segments



Source: Bain Consumer Pulse Survey October 2025

>95% of consumers care about health but ~20-30% say they struggle to maintain healthy behaviours

Relationship with health
% respondents, 2025

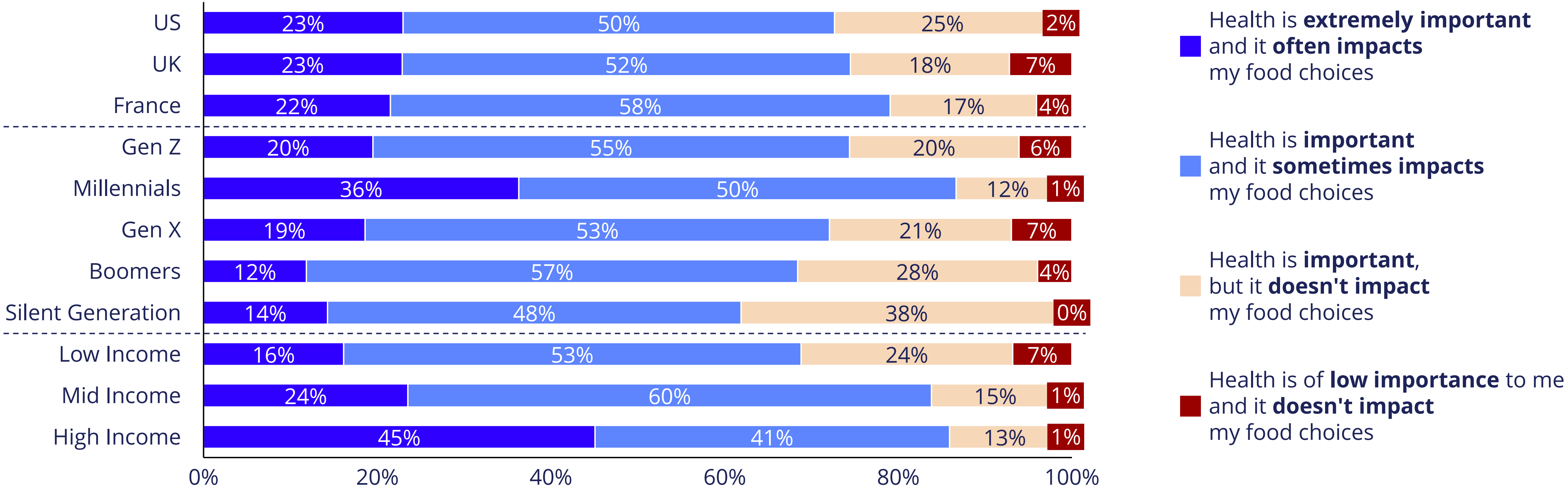


Source: Bain Consumer Pulse Survey October 2025

Health impacts food choices of ~70–80% of consumers

Strongest for French, millennials, higher-income groups; weakest for Americans, older generations and low-income groups

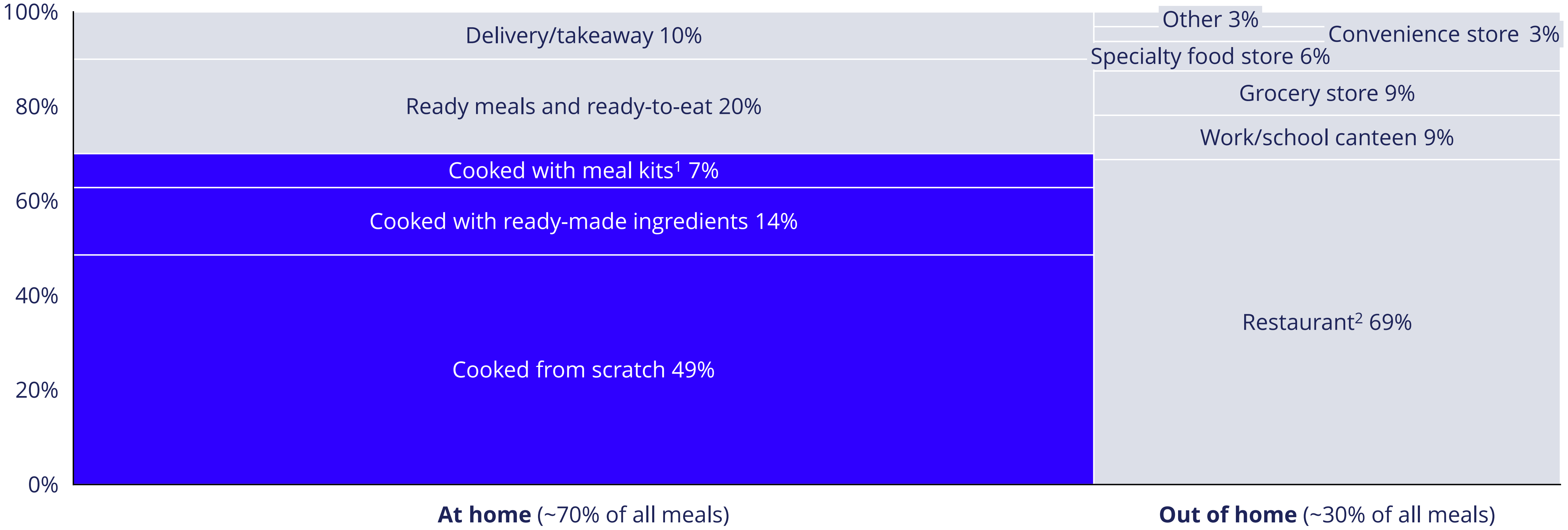
Health in day-to-day food decisions
% of respondents US, UK and France, 2026



Source: Bain At-home Meals Sentiments Survey, June 2026

Home cooking represents a large share of overall meals

Total meals by location and preparation method
US, UK, France, Germany, 2026

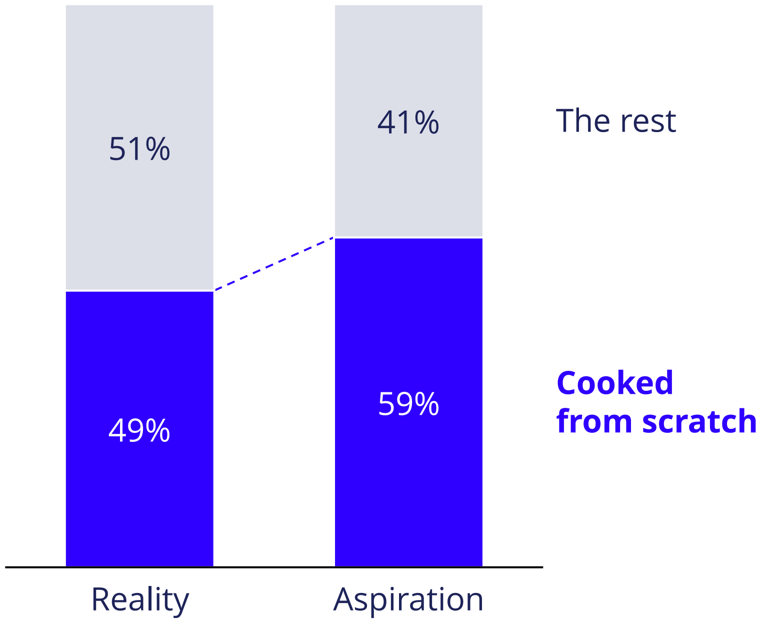


Note: (1) Ingredients that have already been partly prepared, processed, or cooked before purchase
Source: Bain Food & Grocery Shopper Pulse Survey, Feb 2026

Consumers aspire to do more home cooking as it is viewed as healthier, cheaper, higher quality/tastier and to have better control over ingredients

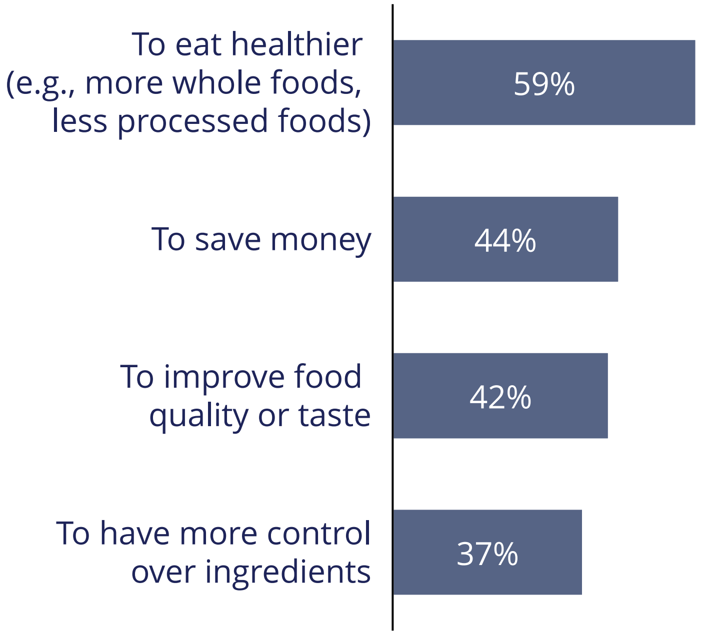
People want to cook more from scratch ...

In % meals, 2026



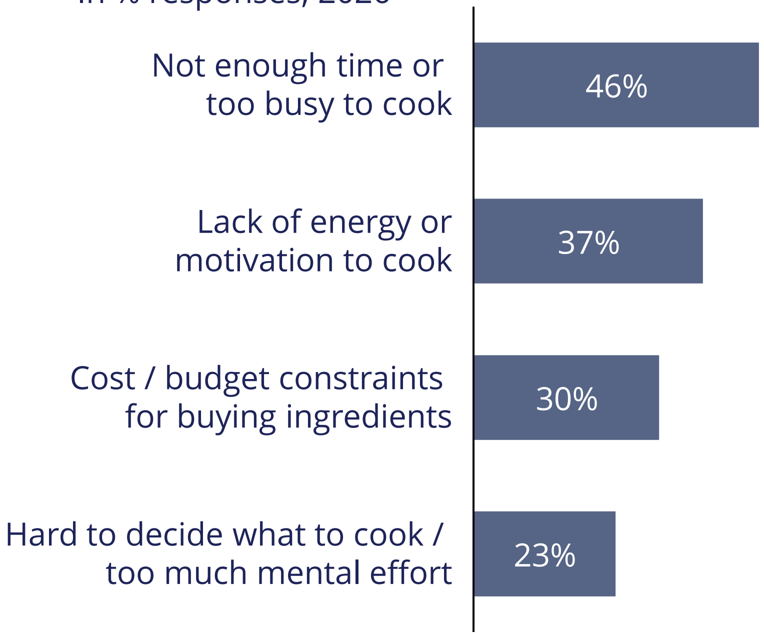
... as it is healthier, cheaper and tastier ...

In % responses, 2026



... but they are too busy to do so

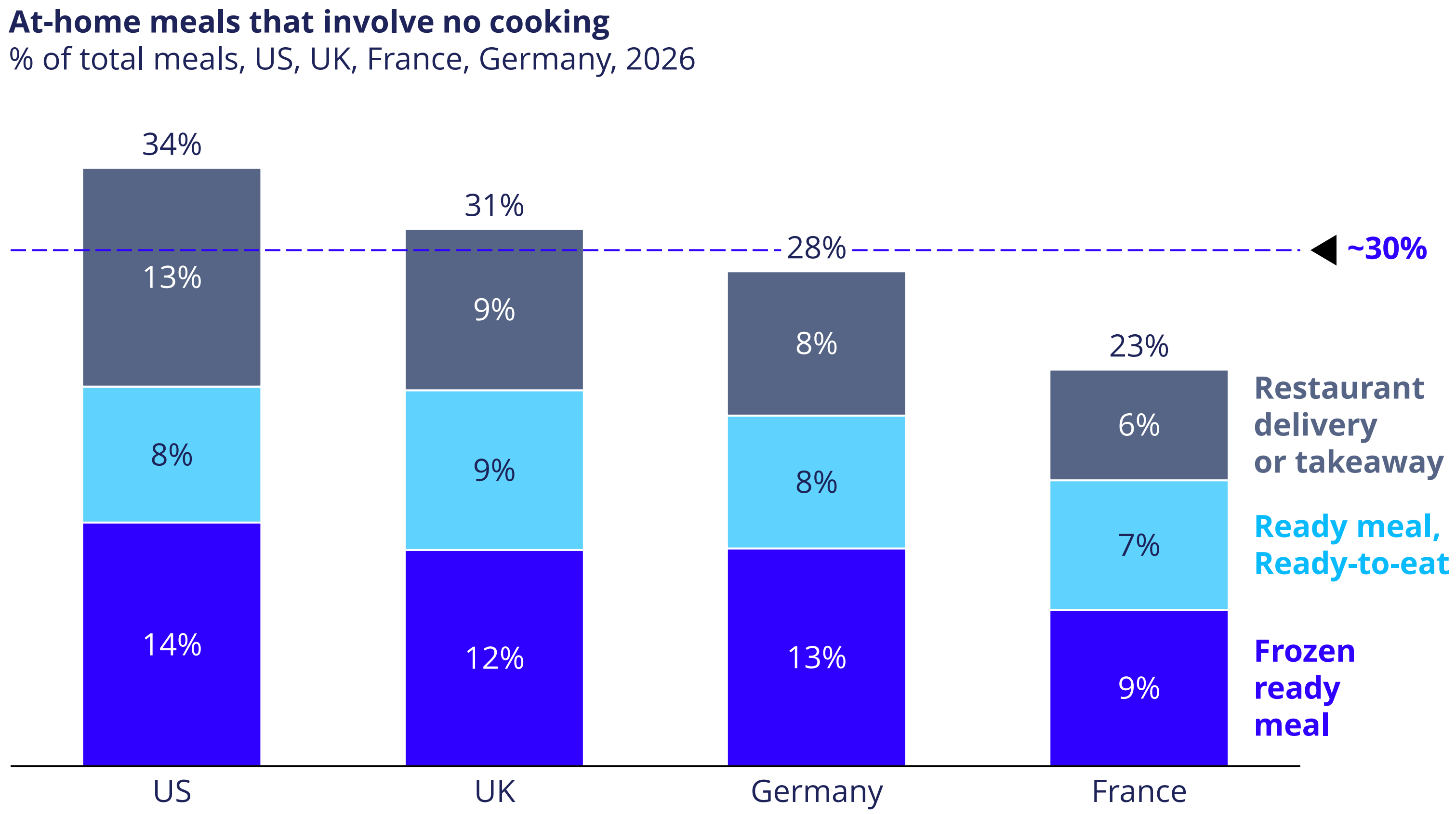
In % responses, 2026



Source: Bain Food & Grocery Shopper Pulse Survey, Feb 2026

Approx. one in three meals eaten at-home involves no cooking at all

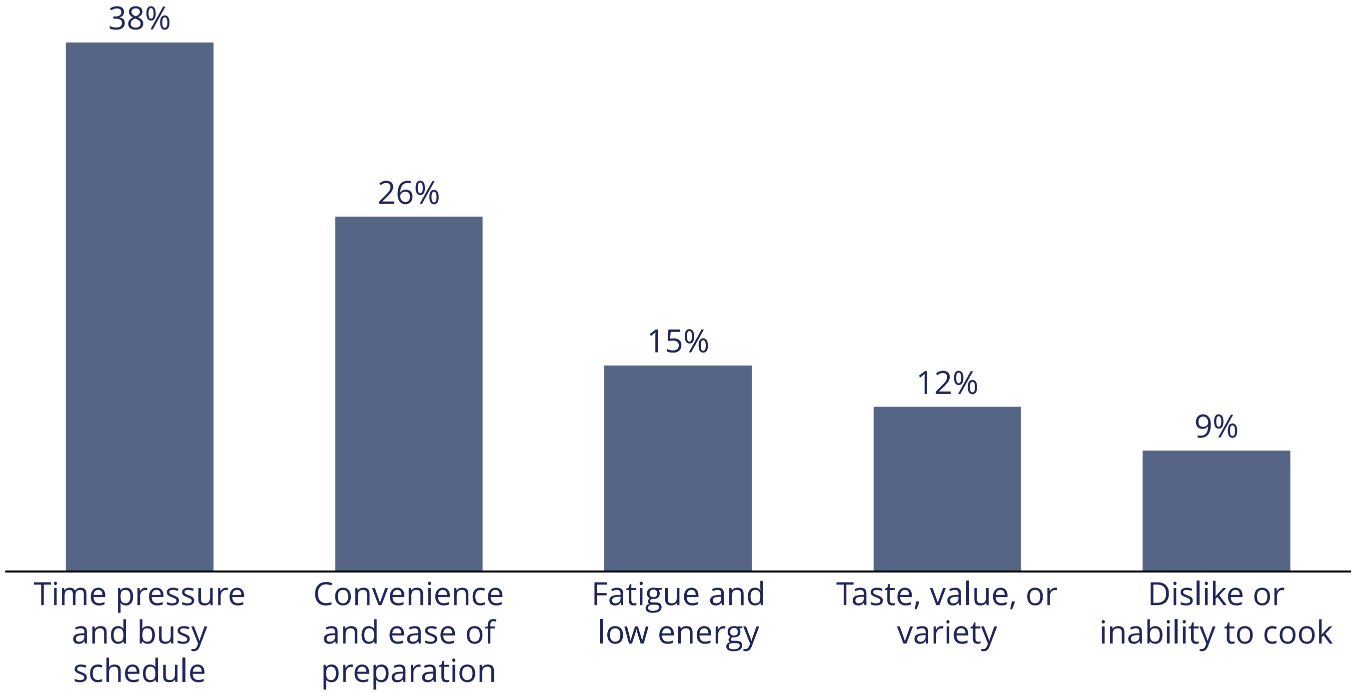
Consumers rely on ready meals and restaurant delivery



Source: Bain Food & Grocery Shopper Pulse Survey, Feb 2026

Ready meals are chosen for their fit with busy schedules and convenience/ease of preparation

Top reasons to buy or eat ready meals at-home
In % respondents, US, UK and France, 2026



"I mainly buy ready-to-eat meals at-home for **convenience and time savings**, as they completely **eliminate grocery shopping, meal prep, and cleanup**."

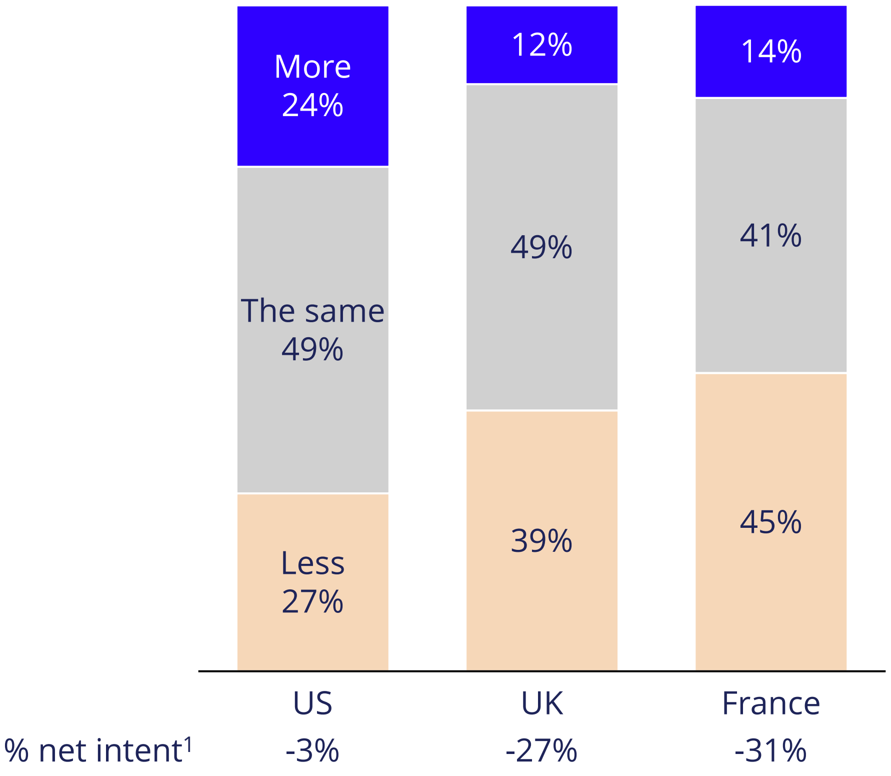
"It usually happens on my **busy days** when **I don't have a lot of energy** or just want to try something different."

"Convenient after a long day, it's **easy and less mess.**"

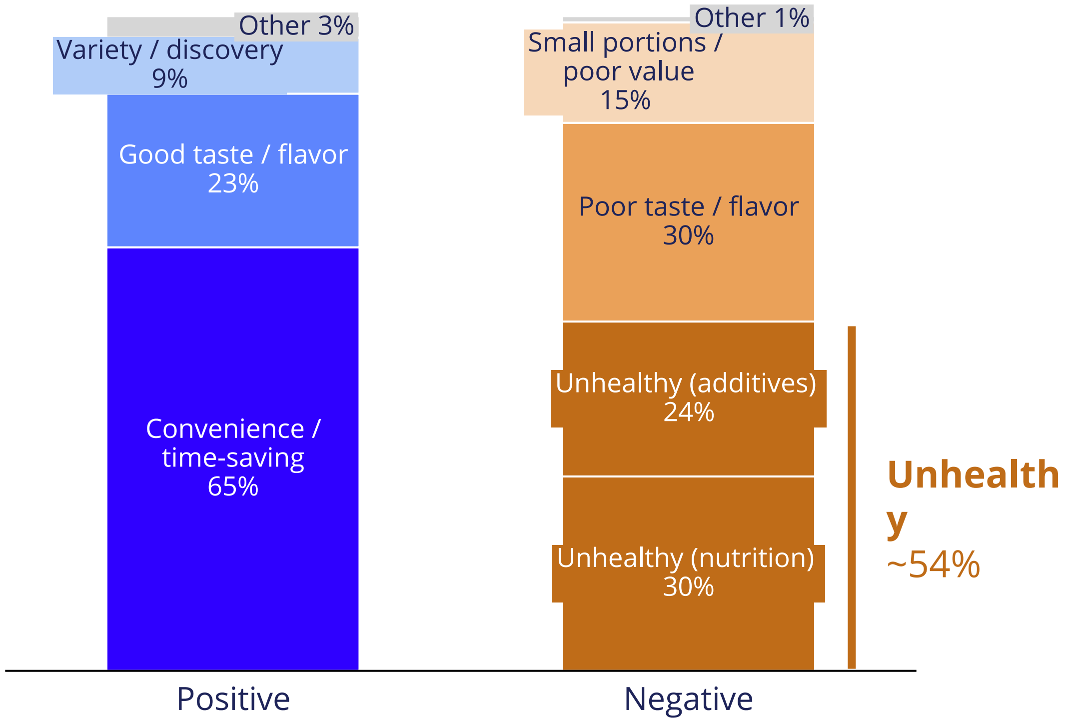
Source: Bain At-home Meals Sentiments Survey, June 2026

Despite their convenience, ready meals are often viewed as unhealthy

Aspiration of respondents on eating ready meals
In % respondents, US, UK and France, 2026



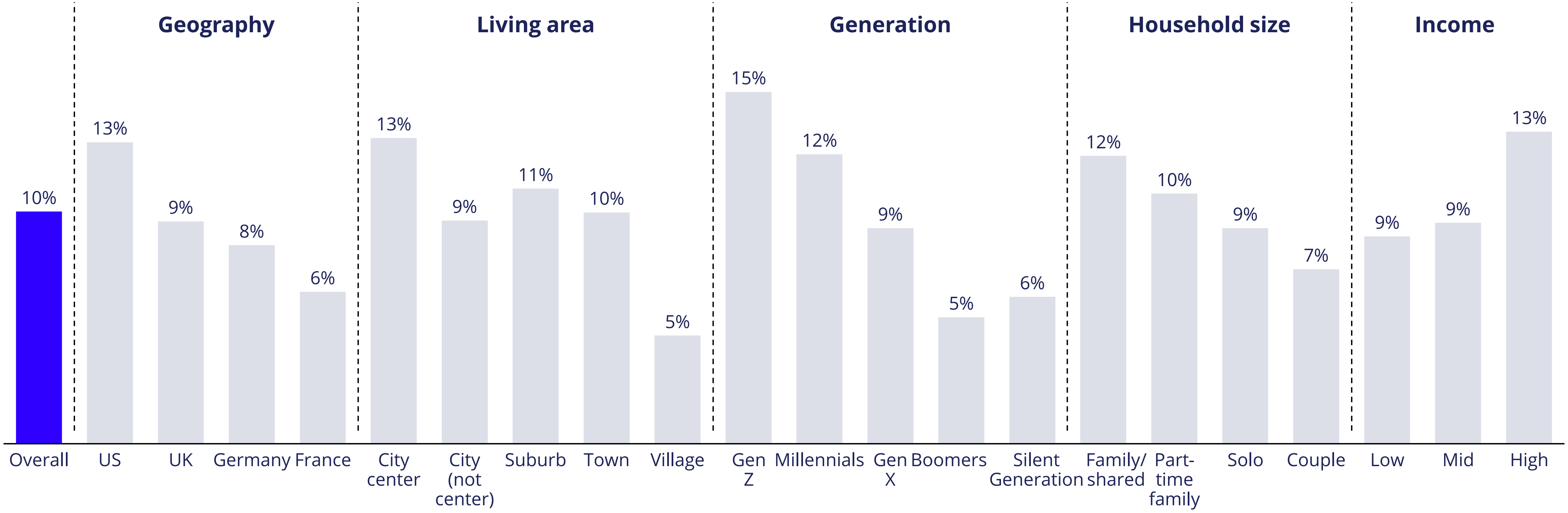
Positive and negative aspects of ready meals
In % total valid responses, US, UK and France, 2026



Note: (1) Calculated as % of respondents aspiring to eat more ready meals - % of respondents aspiring to eat less ready meals.
Source: Bain At-home Meals Sentiments Survey, June 2026

Sourcing meals from restaurants is a viable alternative to cooking and accounts for one in ten at-home meals

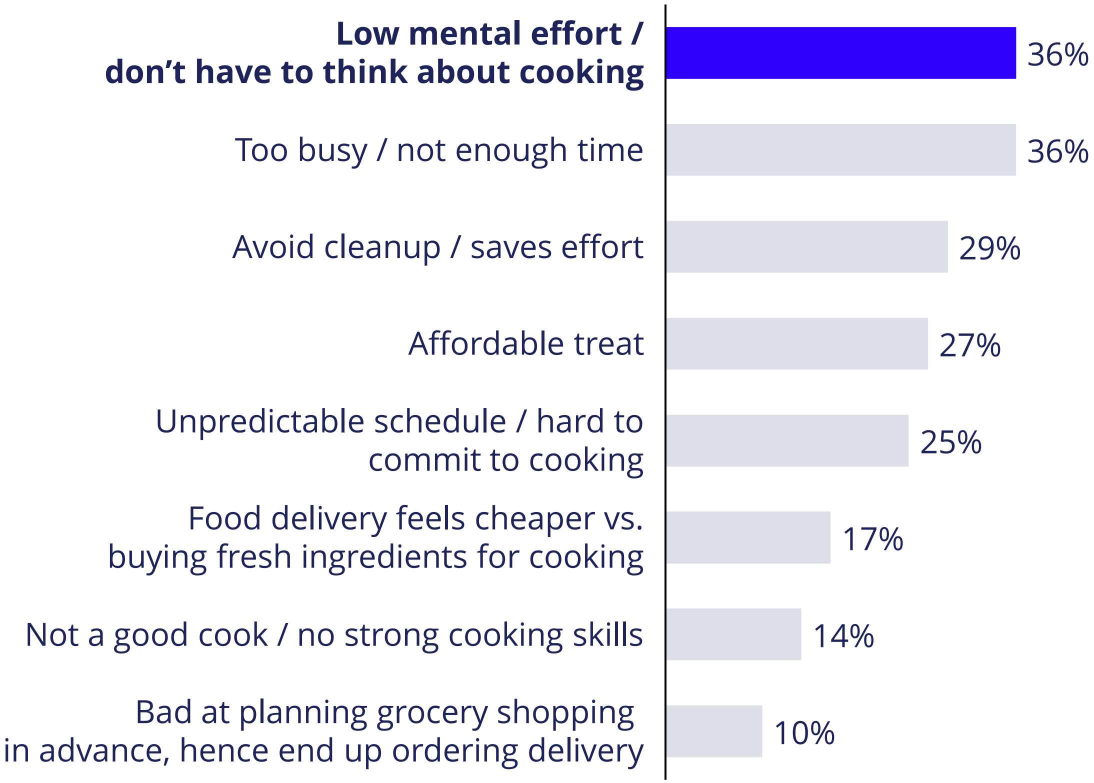
Share of delivery and takeaway in meal mix at-home
In % meals, US, UK, France, Germany, 2026



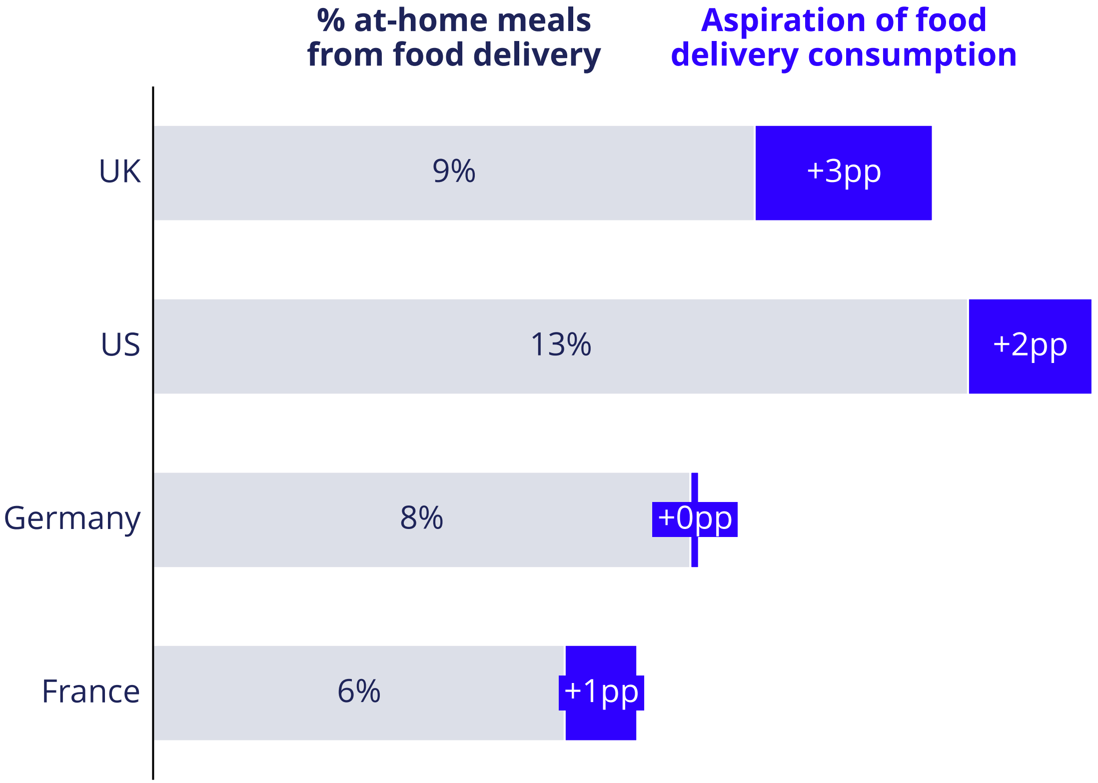
Source: Bain Food & Grocery Shopper Pulse Survey, Feb 2026

Food delivery is convenient and seen as an affordable treat; most consumers would like to consume more

Reasons for ordering food delivery
In % responses, US, UK, France, Germany, 2026



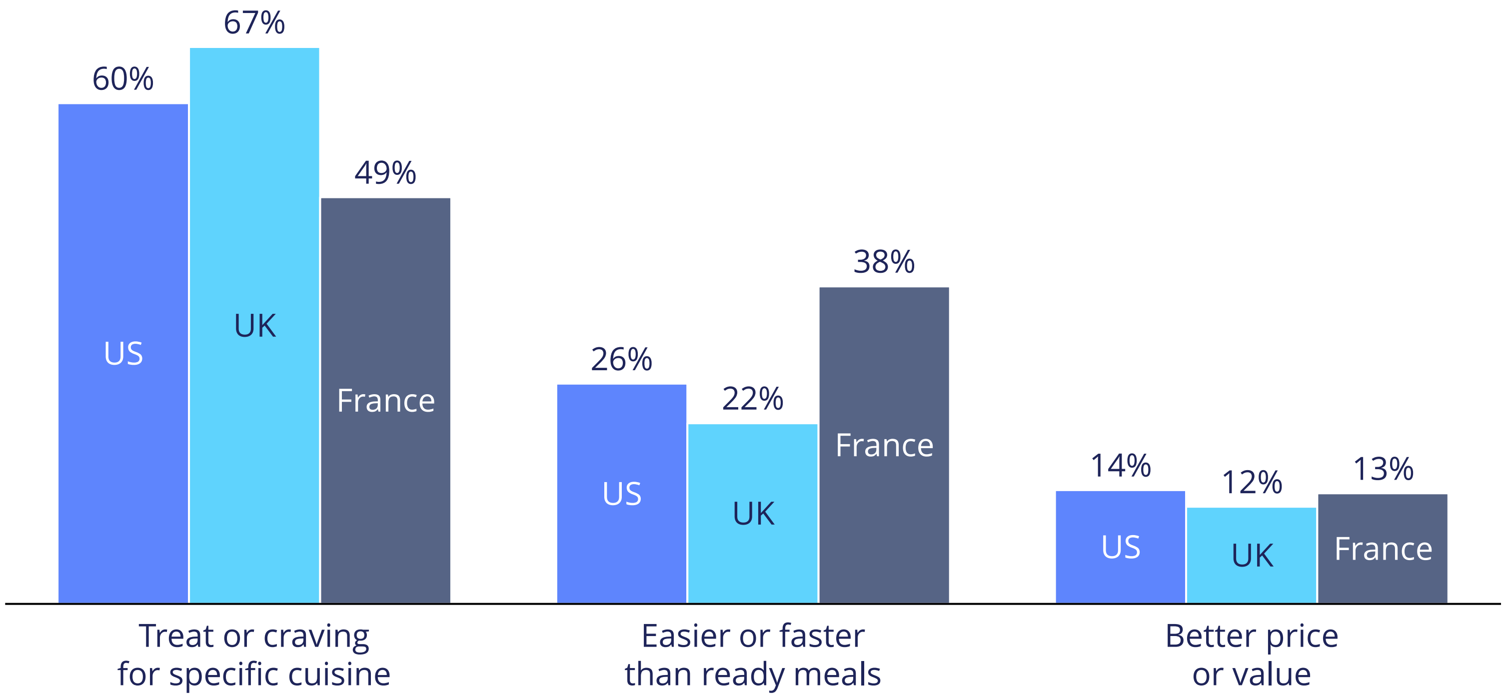
Aspiration to consume food delivery
In % meals, US, UK, France, Germany, 2026



Source: Bain Food & Grocery Shopper Pulse Survey, Feb 2026

Food delivery accounts for one in ten at-home meals, and hits cuisine-specific cravings and restaurant quality that ready meals struggle to match

Top reasons for choosing food delivery over ready meals
In % respondents, US, UK and France, 2026



"I choose delivery when I want a specific cuisine (like Thai) that **ready meals don't offer well**."

"We choose takeaway for a **weekend treat or craving specific cuisines** that **frozen meals can't replicate** with **restaurant-quality** taste."

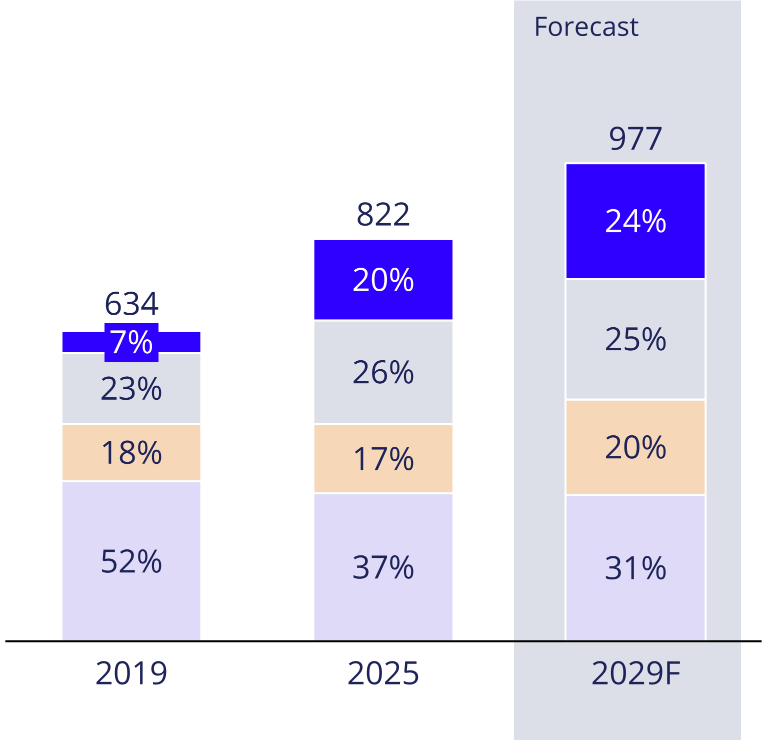
"I usually order **take out** because we are **hungry for that particular food** and are craving that food."

Source: Bain At-home Meals Sentiments Survey, June 2026

Food delivery has grown significantly in the US and Europe; this trend is expected to continue

US

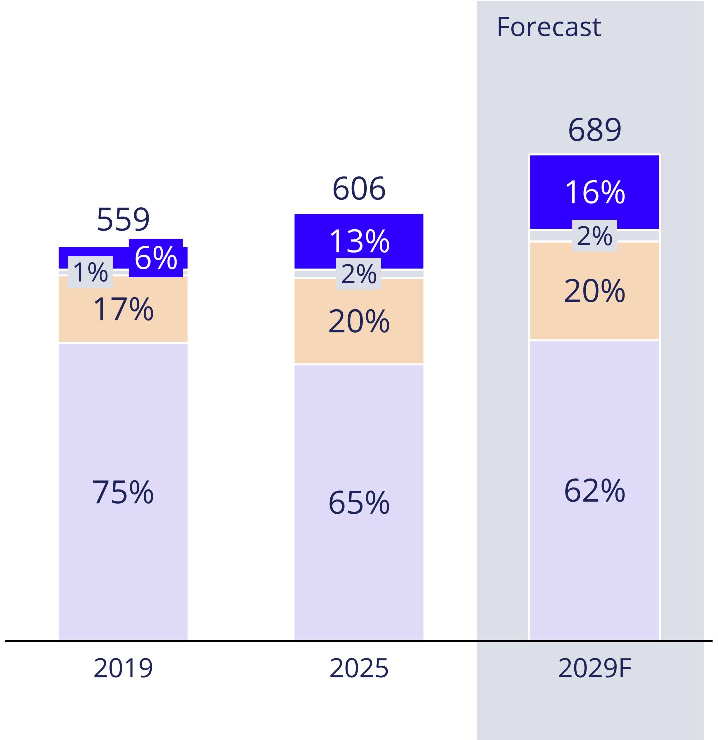
Foodservice sales by channel
In $B, 2019-2029F



CAGR	19-25	25-29
Total	4%	4%
Delivery	**24%**	**9%**
Drive-Through	6%	4%
Takeaway	3%	8%
Dine-In	-1%	0%

Western Europe

Foodservice sales by channel
In $B, 2019-2029F



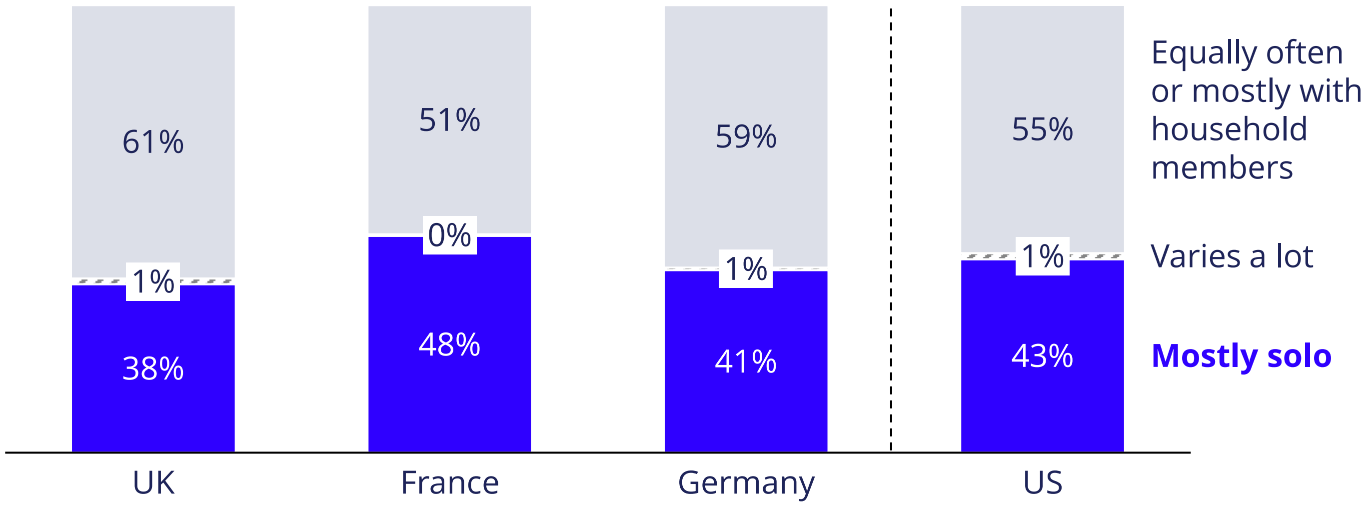
CAGR	19-25	25-29
Total	1%	3%
Delivery	**16%**	**7%**
Drive-Through	7%	6%
Takeaway	4%	4%
Dine-In	-1%	2%

Note: Delivery excludes fees. Foodservice is composed of cafés/bars, full-service restaurants, limited-service restaurants, self-service cafeterias and street stalls/kiosks.
Source: Euromonitor

40% of respondents say they eat mostly solo when at home

Even in multi-person households, one in four primarily eat alone when at-home

Main meal at-home—eating alone vs. with others
% respondents, UK, US, France, Germany, 2026



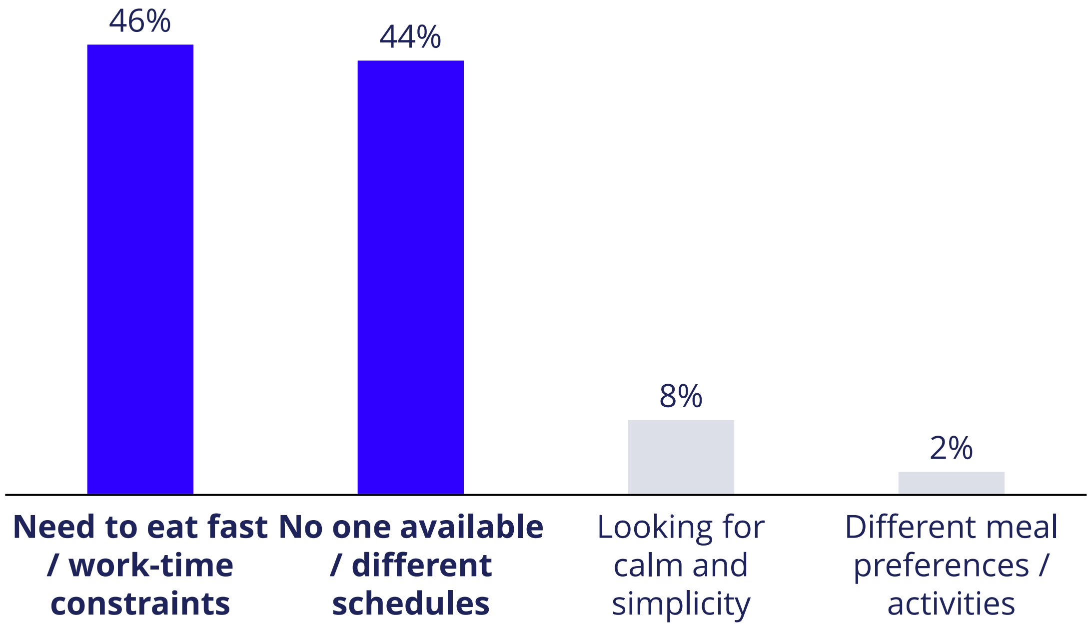
% eat alone when not living alone[1]	23%	20%	31%	19%	24%

Note: (1) Represents % of respondents who indicated more than 1 person in their household (i.e. they do not live alone) yet they primarily have their meals alone (most of time + more often than with HH members)
Source: Bain Food & Grocery Shopper Pulse Survey, February 2026

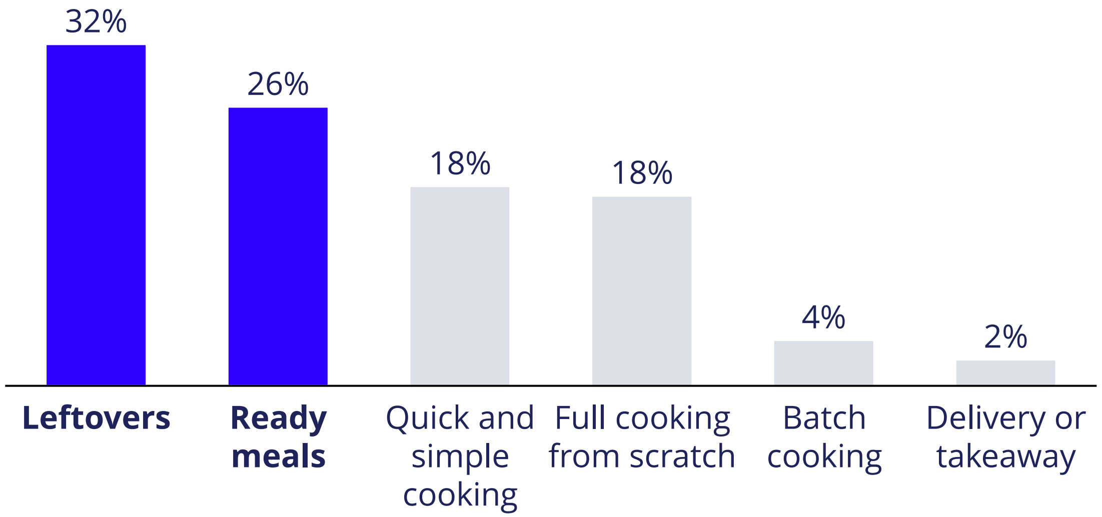
Members of the same household eat solo when they don’t have time, or they have different schedules

Solo eaters are most likely to eat leftovers, ready meals and home cook

Reasons for eating alone (multi-person household)
In % respondents, US, UK and France, 2026



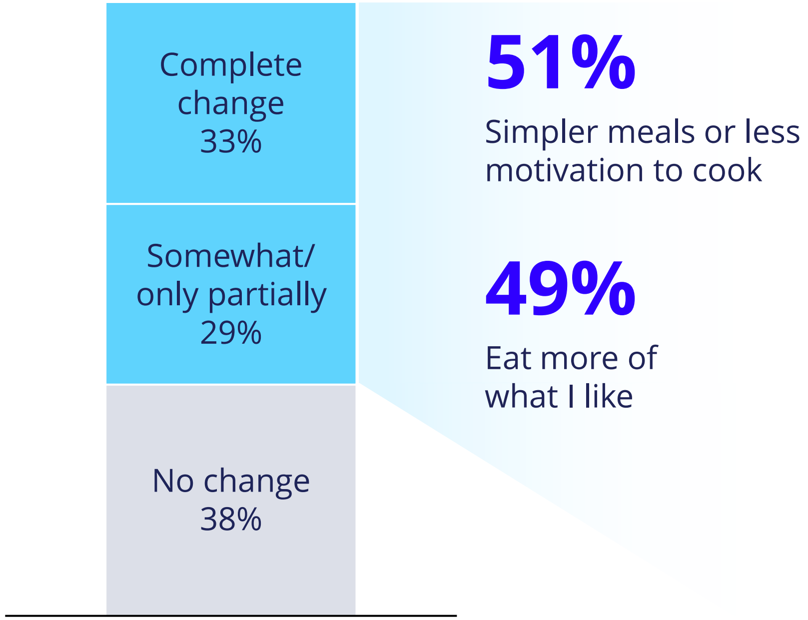
Meal preparation methods when eating alone
In % respondents, US, UK and France, 2026



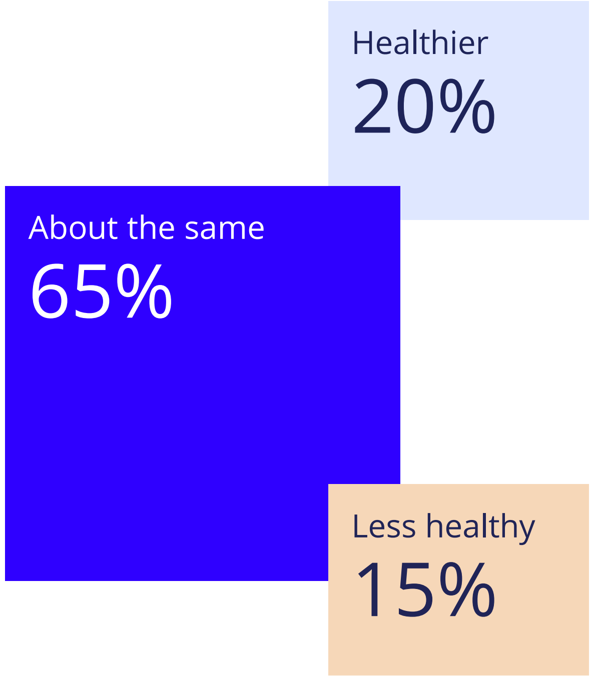
Source: Bain At-home Meals Sentiments Survey, June 2026

Consumers eat more simply when alone, but not less healthily

Respondents who chose meals differently when alone
In % respondents, US, UK and France, 2026



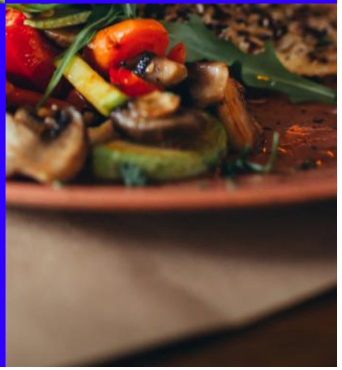
Healthiness when eating alone
In % respondents, US, UK and France, 2026



"Eating alone **doesn't change the healthiness** of what I cook."

"I **don't put as much effort** into cooking when I'm alone, but it **doesn't mean it differs in terms of healthiness**."

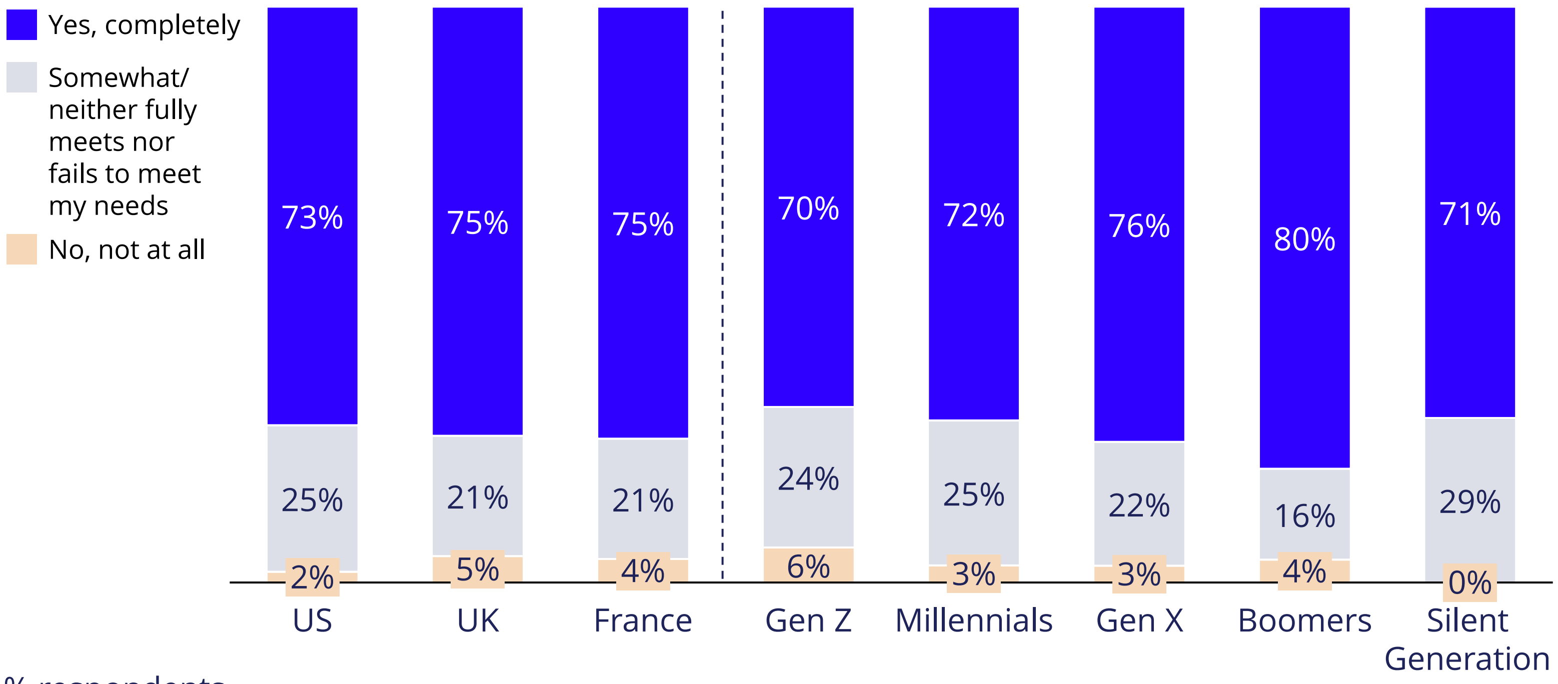
"I choose **recipes I personally enjoy** when I'm cooking for myself but **I still make sure to use quality ingredients.**"



Source: Bain At-home Meals Sentiments Survey, June 2026

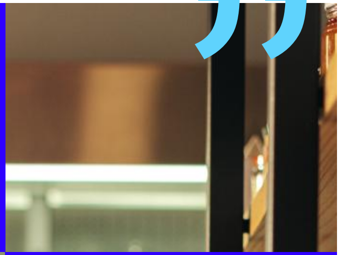
Consumers are satisfied with available solo meal options

Satisfaction with solo eating options available in grocery stores
In % of respondents, US, UK and France, 2026



	US	UK	France	Gen Z	Millennials	Gen X	Boomers	Silent Generation
% respondents eating mostly solo at-home	43%	38%	48%	47%	37%	39%	48%	46%

"The grocery store I shop at **has all the items I'm looking for** when I am eating alone."



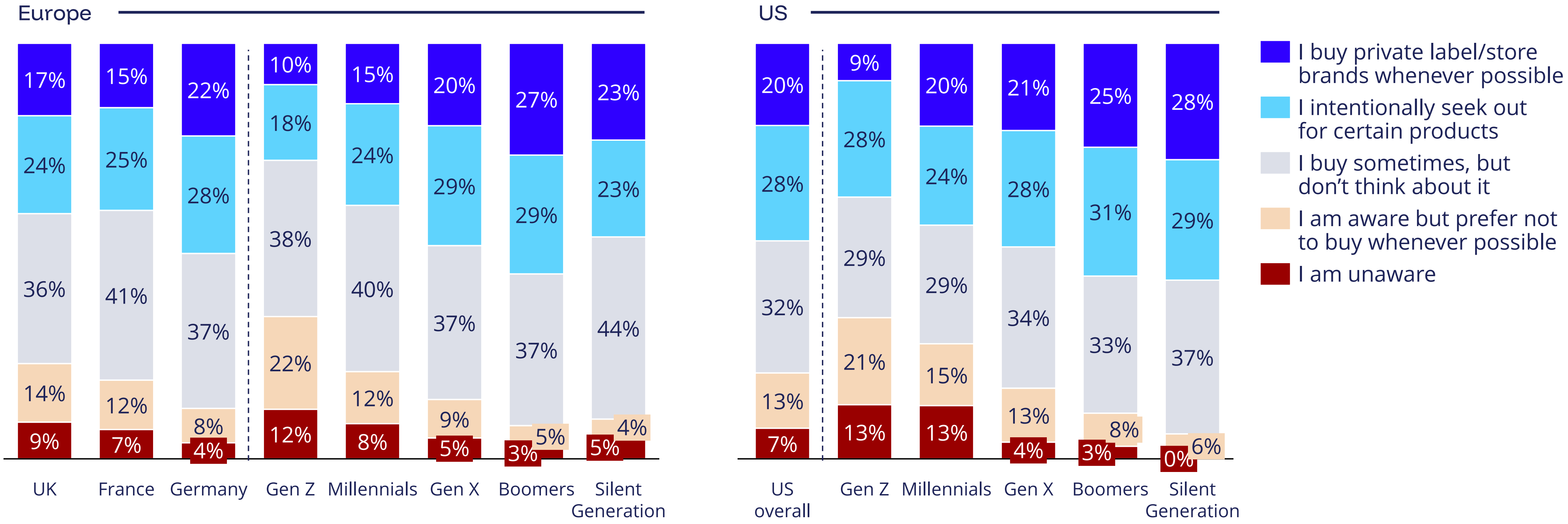
"The grocery store has a **wide variety of different ingredients**, and I can always find something for when I eat alone. I just have to plan out what I'll buy."

"**Single-size ingredients are available**, yet low-sodium pre-made options for solo meals remain limited."

Source: Bain At-home Meals Sentiments Survey, June 2026; Bain Food & Grocery Shopper Pulse Survey, February 2026

Consumers have growing confidence in private label, 40-50% actively seek out private label

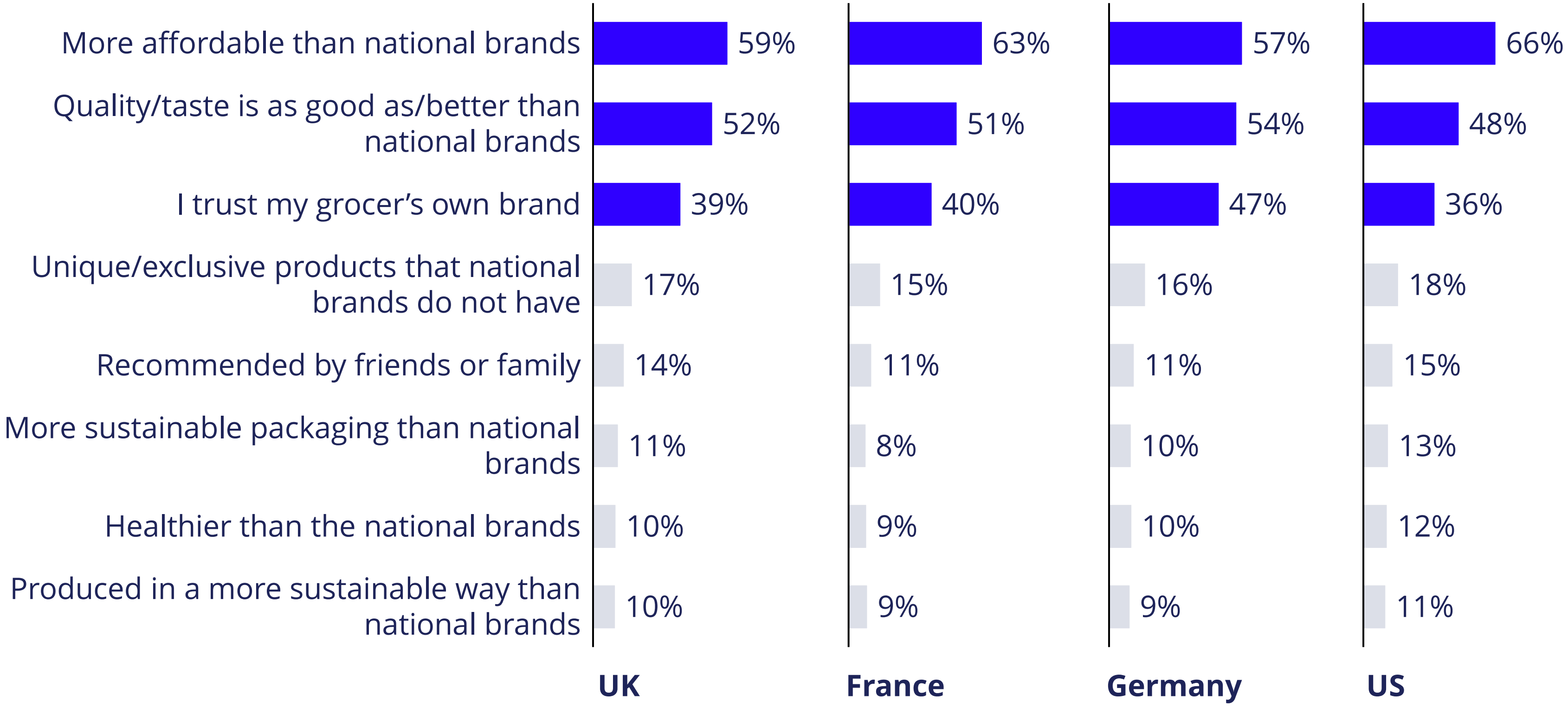
Private label / grocery store brands awareness and buying preference
In % respondents, 2026



Source: Bain Food & Grocery Shopper Pulse Survey, February 2026

Private label is viewed both affordable and having quality/taste as good as brands

Reasons to buy private label
% responses buying private label brands by country, 2026



"**They taste just as good** or better and they **are cheaper**."

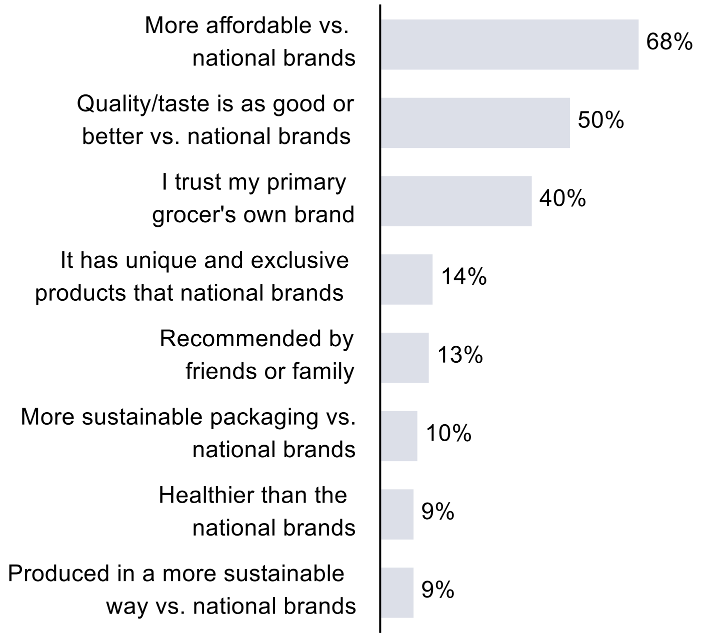
"The cost is much **cheaper** than national brands"

"The quality is often just as good as or even better than, the branded items, and the **price is lower**. As a result, they are usually much better value for money."

Source: Bain Food & Grocery Shopper Pulse Survey February 2026

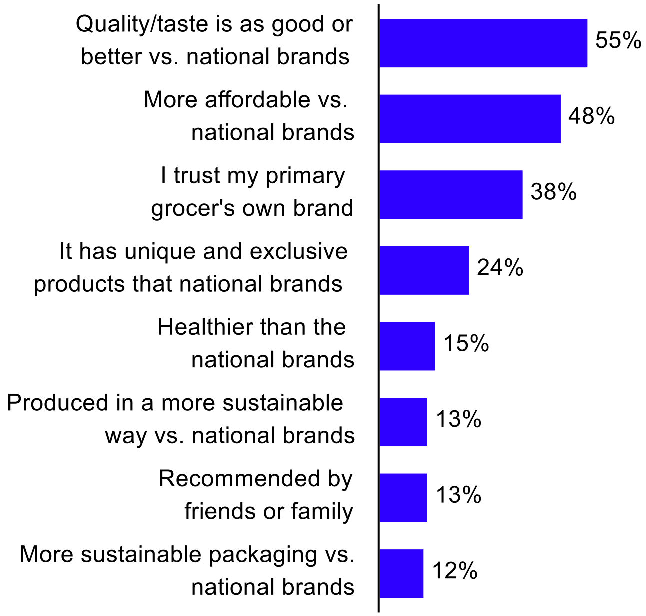
Premium / specialty private label is chosen for quality more often than affordability, with exclusivity playing a meaningful role

Reasons to buy Value PL
% responses, US, Europe, 2026



Private label type bought most often
% responses, US, Europe, 2026

Reasons to buy Premium / specialty PL
% responses, US, Europe, 2026

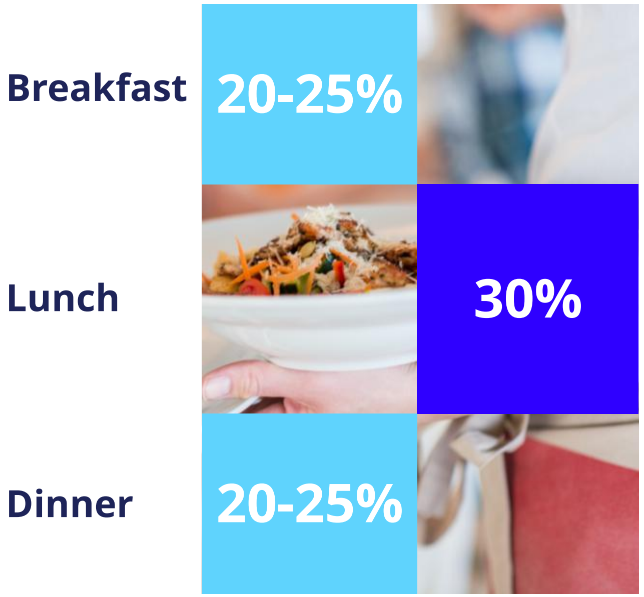


Source: Bain Food & Grocery Shopper Pulse Survey February 2026

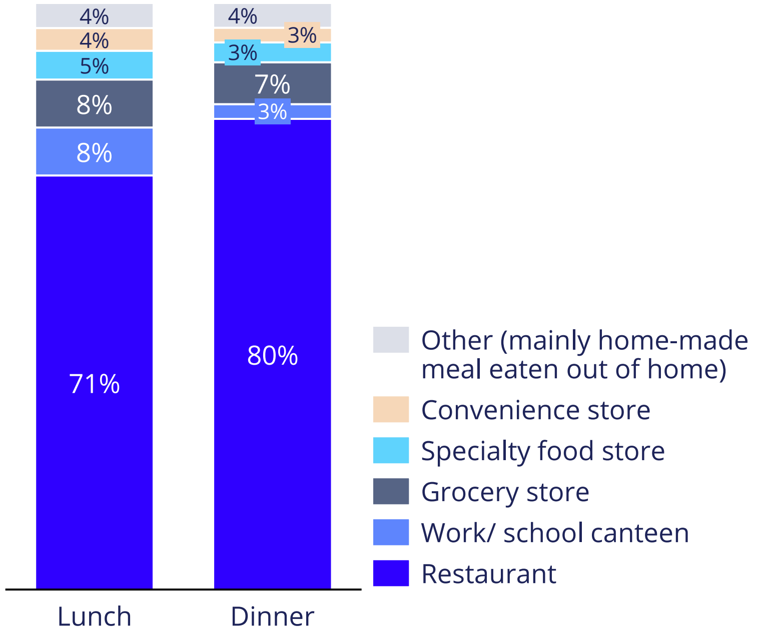
~20-30% of main meals are eaten out of home with the majority sourced in restaurants (~70-80%)

Americans spend ~40% of total food budget on restaurants (incl. delivery)

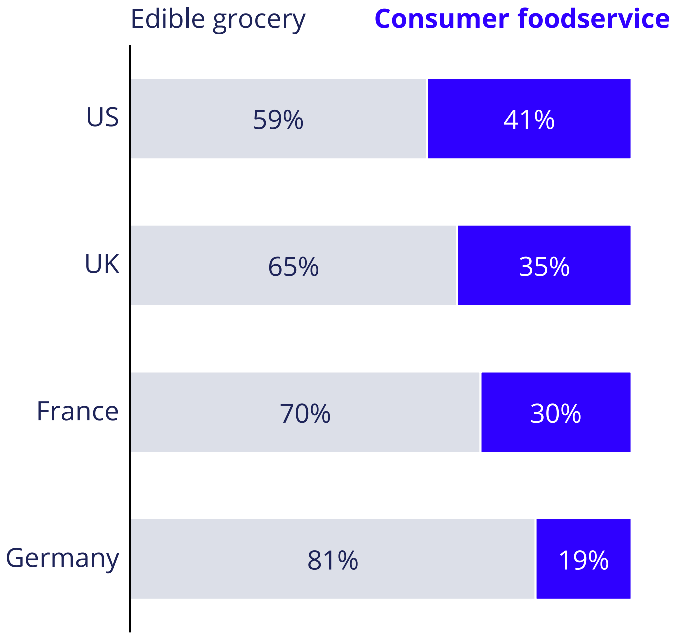
Share of total meals eaten out of home
US, UK, France, Germany, 2026



Source of out of home meals
US, UK, France, Germany, 2026



Restaurants share of total food budget
2025

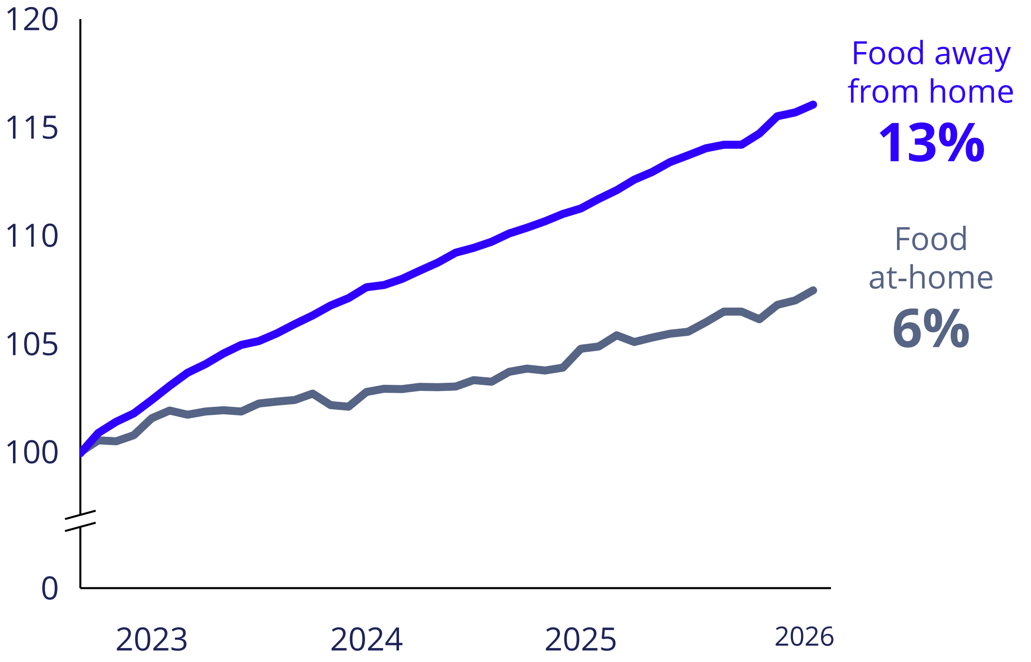


Source: Bain Food & Grocery Shopper Pulse 2026, Flywheel, Euromonitor

One third of consumers say they are pulling back on spending at restaurants following high inflation

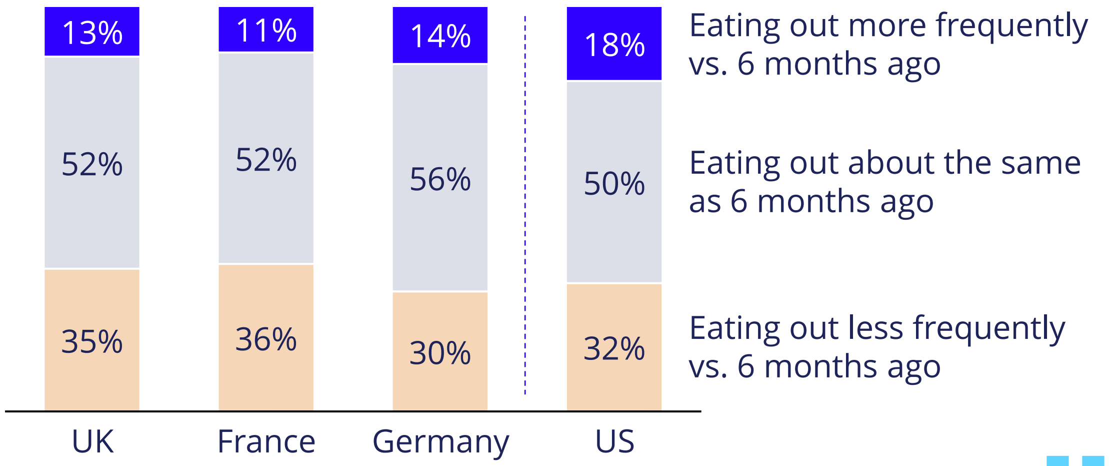
Restaurant prices have increased far more than grocery

US CPI food at-home and food away from home
Indexed to Sept 2022 = 100, US, 2022-26



Consumers say they are eating out less

Frequency of eating outside home
% respondents by country, 2026



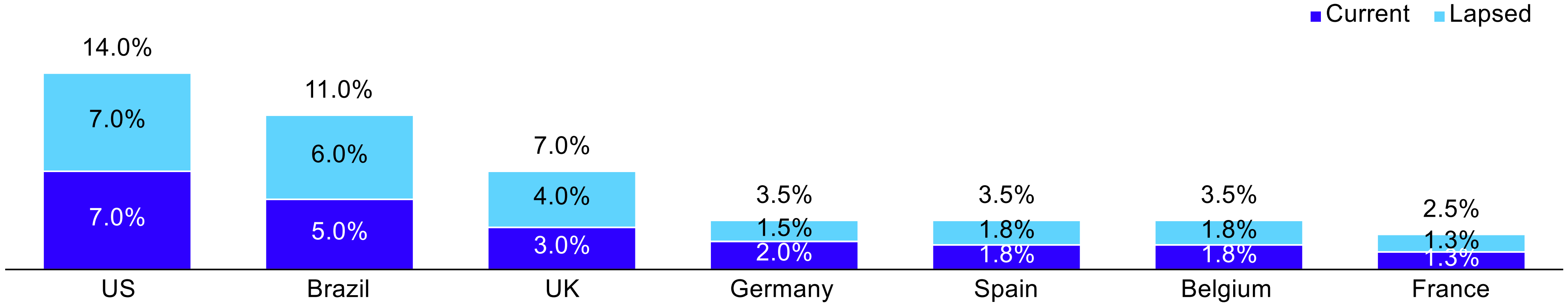
“The **cost of living** has gone up and I don't want to **spend unnecessary money** on meals out, I always take a meal prepared from home.”

“**Everything is very expensive** and I can make it better myself. Friends and family are **watching their budgets so don't want to go out**.”

Source: U.S. Bureau of Labor Statistics; Bain Food & Grocery Shopper Pulse Survey February 2026

US demonstrates highest GLP-1 penetration today with Brazil & UK following

GLP-1 users share of adult population
2025

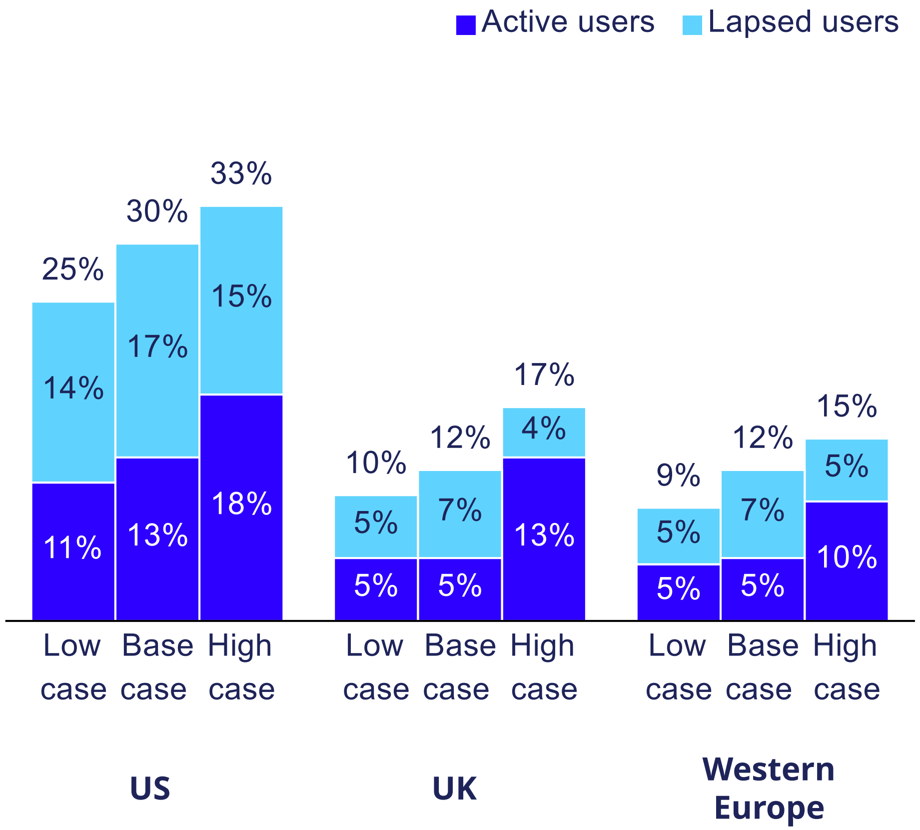


	US	Brazil	UK	Germany	Spain	Belgium	France
Adult obesity rate	38%	22%	27%	21%	15%	17%	16%
Obesity coverage	Approved; coverage depends on insurer	Not covered	Partial / BMI>35, obesity + comorbidity	Not covered	Not covered	Not covered	Partial / BMI>40, BMI>35 + comorbidity
Type 2 Diabetes coverage	Covered by Medicaid / Medicare	Covered	Covered by NHS	Co-payment	Co-payment	Co-payment	Co-payment
Private clinics / off-label usage	?	✓	✓	✗	✗	✗	✗

Source: 2025 US GLP-1 survey; 2026 UK & DE GLP-1 survey; INE; Pordata; INSEE; Gov.UK; Eurostat; Barmer

By 2030, one in three Americans and one in eight Britons will have 'ever used' GLP-1s (base case)

GLP-1 users share of adult population
2030



Scenarios depend on public financing, price & access, and new indications

	Public financing	Price & access	New indications
Low	Limited access to **public financing** in overweight & comorbidity, beyond what is already available	**Private payment** limited due to **regulatory constraints** and **high** prices	New indications **not approved**; certain but limited prevalence of orals
Base	Initial funding of **high-risk obesity + comorbidity**	Private **payment more affordable** and wider offer of obesity-oriented drugs	**Orals** remove injection barriers **increasing new user adoption** and extending to overweight pop'n
High	Wider **integration into public system** for lower BMI requirements	**Entry of generics** drives prices down, improving access	GLP-1s **approved** for broader **pathologies** e.g., CVD, renal, addiction, etc.

Source: Bain GLP-1 market model; IQVIA

Over the longer term, usage could become globally mainstream through increased / sustained adoption

Factors that would increase and sustain penetration of GLP-1s in the longer term

Cheaper medication

List prices falling due to increased competition, introduction of generics, and less expensive orals

Fewer side effects

New generation drugs have higher efficacy enabling lower doses thus reducing intensity of side effects; **clinicians also learning** better **management of side effects**

Orals

Oral forms will overcome adoption barrier for small population of eligible non-users; due to lower efficacy than injectables they are **likely to be indicated for overweight opening up to new populations**

Additional indications

Imminent trials focus on further **weight-related indications expanding reimbursement**; longer term expansion to CVD, liver, renal, addiction would expand populations eligible

Coverage & access

Significant payer coverage expansion (insurance, public health) if the medication continues to prove effective at reducing treatment costs of obesity

Social norms

'Normative band' of body weight shifts downwards and increased acceptance of obesity as a treatable, medical condition

Informal/ grey market access

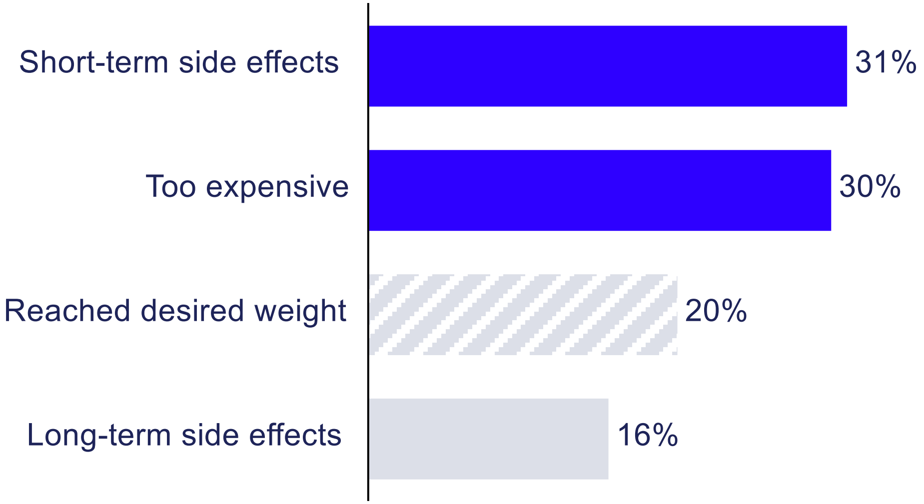
Adoption may outpace official projections in certain markets where **informal distribution channels** increase access beyond traditional healthcare pathways

Today, churn, driven by side effects and price, is a brake on user penetration (more so in the US)

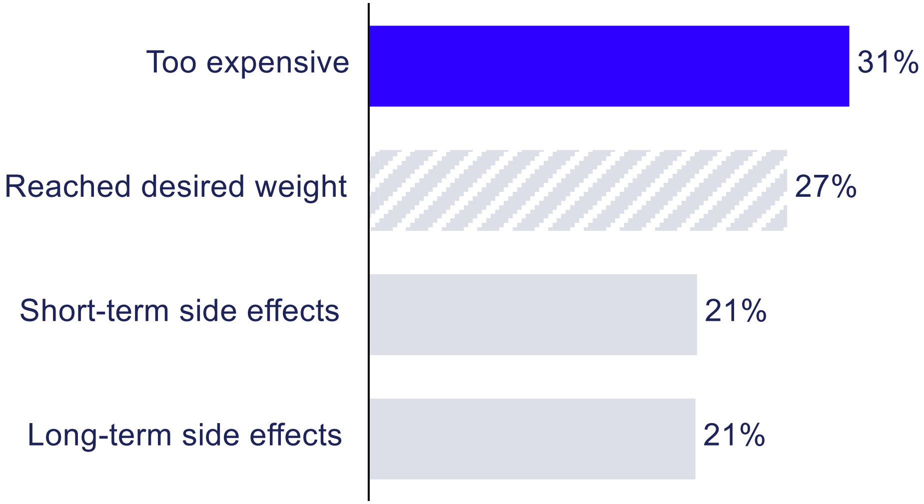
~42%
of US GLP-1 users churn by end of year 1

~17%
of UK GLP-1 users churn by the end of year 1

Reasons for lapse % of respondents



Reasons for lapse % of respondents

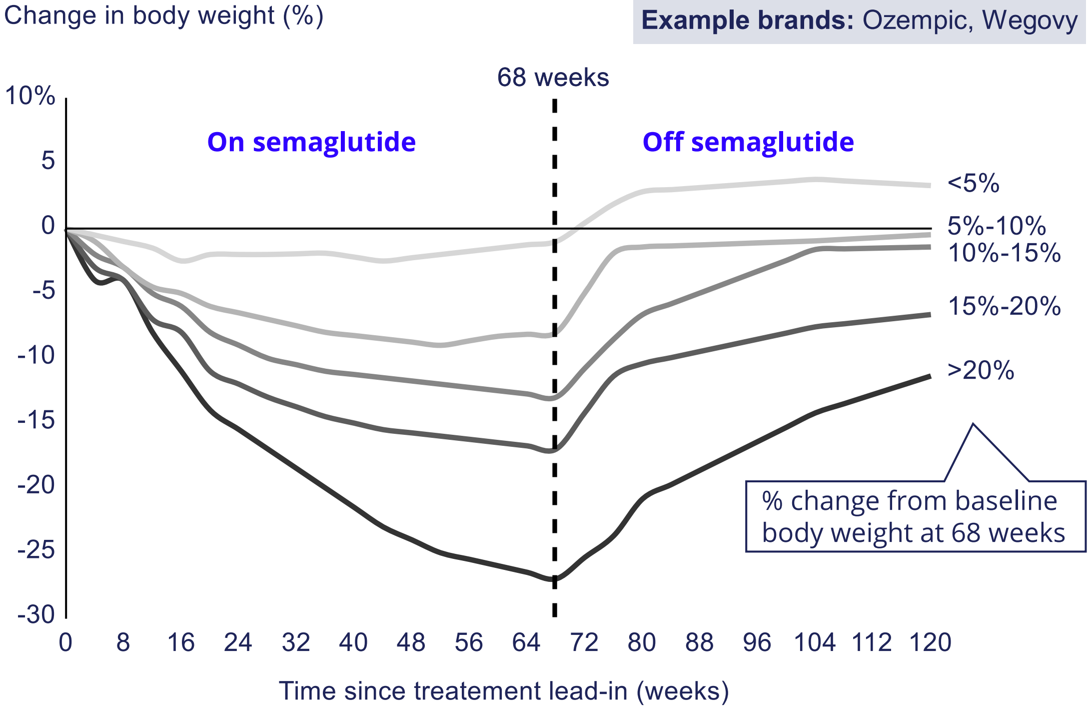


Note: Illustrative new user base; based on model churn and restarter rates | Source: 2025 US GLP-1 survey; 2026 GLP-1 survey

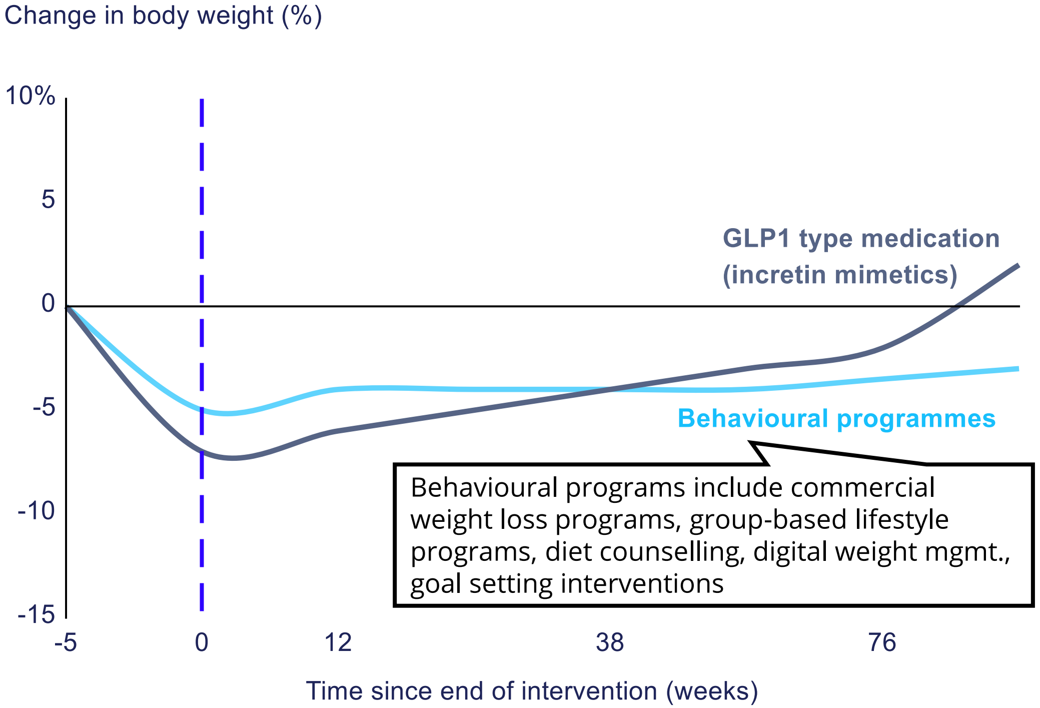
Churned users typically regain weight, an effect that dampens impact today on overall food spending; behavioural programs support improves persistence

Semaglutide users regain ~50% of weight ~1 year after stopping

Example brands: Ozempic, Wegovy



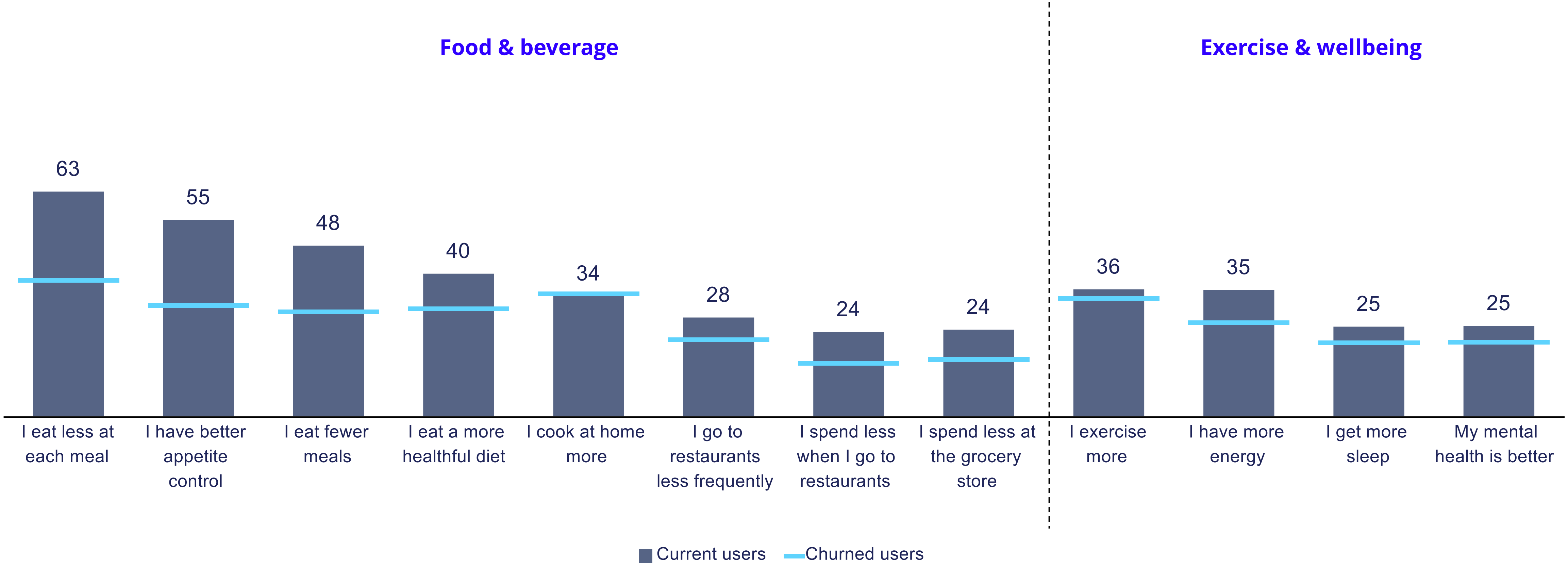
Without behavioural programs, patients return to baseline weight within 1.5 years



Note: "Incretin mimetics" refers to a drug class mimicking incretin hormones, which regulate blood sugar and appetite
Source: Wiley 2022 - Weight regain and cardiometabolic effects after withdrawal of semaglutide: The STEP 1 trial extension; Oxford's Nuffield Department of Primary Care Health Sciences 2026

Current users adopt a healthier food-related lifestyle; lapsed users retain some behaviour change

Current users habit/lifestyle change, compared to before taking GLP-1
In % users, US

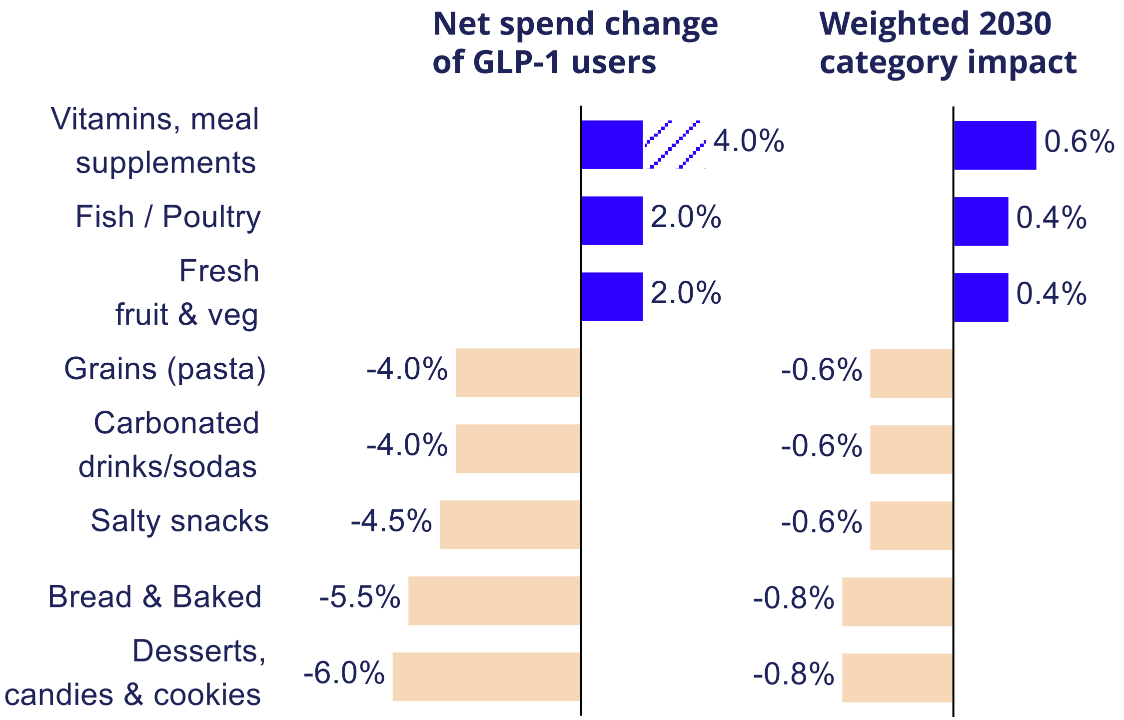


Source: 2025 US GLP-1 survey

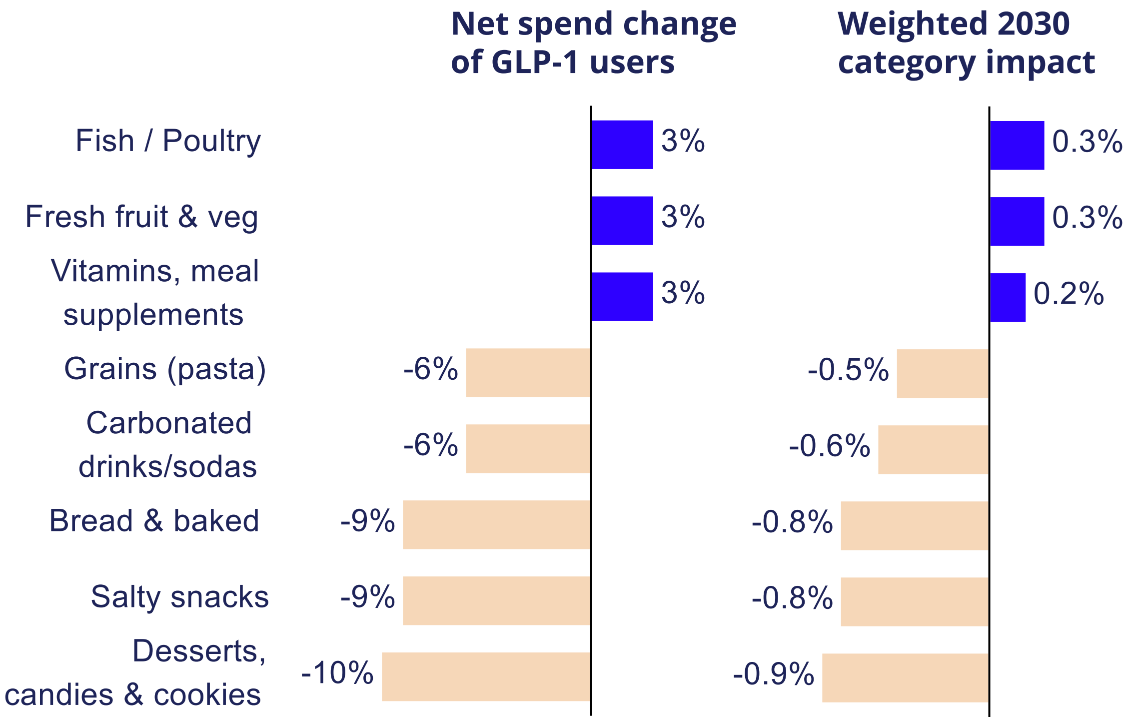
~3-4% reduction in overall grocery spending for GLP-1 users, spend shifts away from centre store to fresh

Actual spend analysis indicates a ~3-4% reduction in grocery spend for GLP-1 users

Category impact of GLP-1 users (US)



Category impact of GLP-1 users (UK)

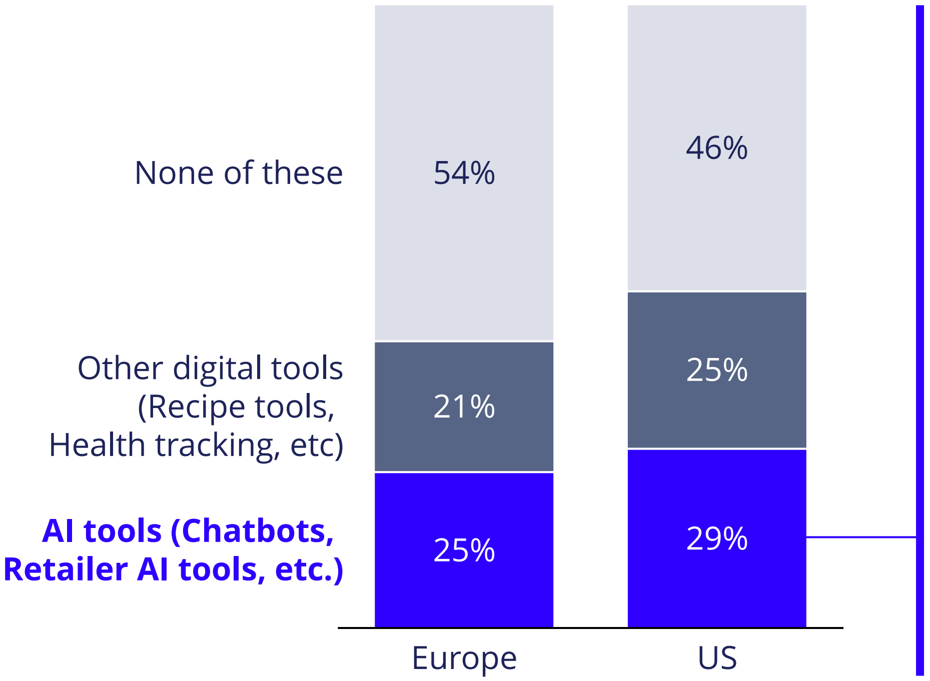


Source: Bain GLP-1 market model; Pyxis Credit Card data

AI dietary co-pilot

Half of consumers already use digital tools (including AI) for food planning, preparation and shopping with nutrition/dietary guidance as a top use case

Use of tools in food planning, prep and shopping
% respondents in US and Europe, 2026



AI tool use cases in food planning, prep and shopping
% of respondents using AI tools in US and Europe by country, 2026

Source: Bain Food & Grocery Shopper Pulse Survey February 2026

Implications & imperatives

Implications

Consumers are increasingly looking to eliminate trade offs

They expect health, convenience, affordability, and taste **simultaneously**

Digital transparency is driving more informed consumer choices

Consumers will have **unprecedented visibility** into product attributes

Private label is gaining “share of trust”

Trust in food is increasingly important, private label is gaining share

AI-driven discovery is reshaping brand influence

Brands need to **build capabilities** for **AI-driven paths to purchase**

GLP-1 adoption could become globally mainstream

Category economics and **growth opportunities** will be reshaped

Imperatives

Win with consumers: Strengthen **value and health positioning**; deliver on health, convenience, affordability and taste simultaneously

Reinvent portfolios for the next wave: Monitor consumption shifts and accelerate reformulation and innovation on **new demand spaces**

[CPGs] Compete beyond the shelf: Secure **visibility in retailer apps** and **digital shopping ecosystems**; consider growing **supply with QSR**

Modernize marketing models: Build **trust and strengthen brand relevance** through **creators, influencers, credible third-party voices**

Prepare for AI-driven discovery: Optimize **product data infrastructure** and messaging around distinctive, evidence-based product attributes

Case studies

Case study

Albert Heijn meal kits make cooking healthy meals easy

Situation

- Albert Heijn is the **largest supermarket chain in the Netherlands** (1,200+ supermarkets) and is committed to "**making better food accessible for everyone"**
- **Over 1 in 3 Dutch adults want to eat healthier**, yet consume **~100g fewer vegetables daily** than recommended on average
- **Convenience, price and time** are often named as barriers to eating healthier meals
- Albert Heijn has been offering **meal kits since 2004** and was looking **to revamp the product line** in 2025

Approach

- Analyzed **customer trends and dietary needs** to **identify what consumers look** for in fresh meal kits, in order to make the **existing meal kit assortment even more healthy, affordable and convenient**
- Developed **distinctive recipes** that balance **strong taste appeal with better nutrition**, including **lower salt and sugar levels**, more **plant-based options**, and **high-quality ingredients**
- Built a line of ~**60 fresh meal kits**, of which **>80% contain at least 200g of vegetables** per person, with several cost less than €2.50 per serving
  - Introduced smaller portion kits for 1-2 people, complementing the existing 3-4 person kit format

Results

26.9M+	+6%	~23%
Meal kits sold in 2025	Sales increase in 2025 vs 2024	Meal kit penetration

- Quantified meal kit penetration at 23%, i.e. **significant growth potential** with 77% untapped customers
- **Cut food waste** by using precisely measured/pre-portioned ingredients and optimizing packaging

"AH Verspakketten make **healthier eating incredibly easy**. They help people add more vegetables to their meals in a convenient, tasty and inspiring way — **without having to think** about what to cook or buy. By combining fresh ingredients with simple recipes, healthier choices become more **accessible** and **affordable** for everyone. It's a great example of how convenience can truly help drive better eating habits."

Korneel van der Plas, Unit Manager De Tuin, De Keuken, Foodservice & Albert Heijn To Go

Case study

Greenyard successfully developed a new generation of pure-plant frozen ready meals

Situation

- Greenyard is **a global pure-plant market leader** in **fresh, frozen, and prepared** fruit and vegetables
- Post-pandemic, fast-paced lifestyles drove **demand for healthier and convenient meals**, yet **frozen ready meals** remained identified as **processed, low-vegetable and low-nutrition** products.
- Greenyard was looking to bring a new generation of **pure-plant ready meals** to the German market in 2025

Approach

- **Co-developed in 9 months**, with a **major German retailer**, a new **range of pure-plant frozen ready meals**, leveraging consumer insights and Greenyard's frozen vegetable expertise
- Designed meals to have **high vegetable content**, grains, legumes, **protein and fibre**, while offering **variety** through globally inspired recipes
- Built a range of **6 tasty pure-plant, frozen, single-portion meals** aligned with retailer's category strategy

Results

€2M+
Retail sales within first 12 months

800k+
Total units sold within first 12 months

16k+
Avg. weekly units sold

- **Successful rollout** through a major German retailer, with **expansion plans for late 2026**
- Validated that consumers adopt **frozen convenience** when **nutritional quality** and **ease of use** are **complementary benefits**

"Convenience is **no longer defined solely by speed**; consumers increasingly **expect meals that also deliver on nutrition and taste**. The project demonstrated that frozen convenience plays a much broader role in healthier eating than traditionally assumed, showing that **frozen categories can credibly respond to these evolving expectations**."

Valentijn Verhaeghe
Convenience Business Unit Manager, Greenyard

Case study

Grupo Bimbo enables healthier eating at scale by improving everyday staples

Situation

- Grupo Bimbo is the world's **largest baking company** and is committed to **"bringing nutritious and delicious food to everyone“**
- Consumers increasingly want to eat healthier, but **lack of time, complexity** and **cost** are still barriers
- Most food innovations to address consumer demand focus on **ready meals or advanced solutions**, but these often remain less accessible or less integrated into daily routine
- Grupo Bimbo set out to close the gap on healthier eating in a **simple, scalable** and **affordable** way by improving everyday staples

Approach

- Launched **"Baked for You"** strategy, reducing sodium, sugars and saturated fats while increasing fiber and plant-based protein
- Reformulated recipes to use simpler, recognizable ingredients, **removing artificial colors** and **flavors**
- Introduced **portion guidance** and **clear labelling** to support balanced eating across multiple price points
- Enabled consumers to build healthier everyday meals using **nutritionally improved bakery staples as a flexible base**

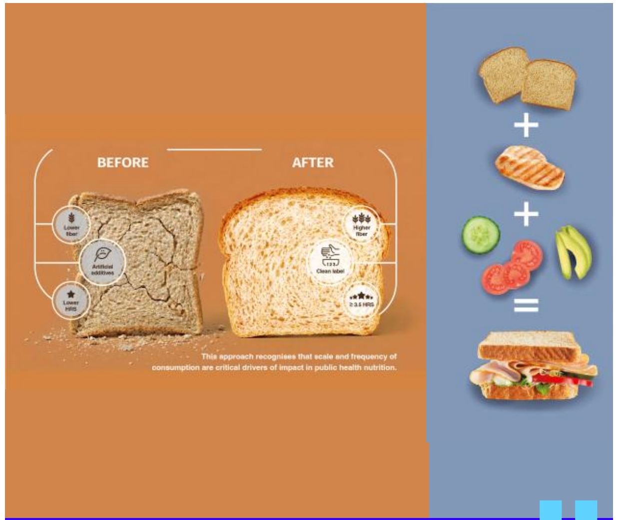
Results

48%
Sales from products meeting or exceeding optimal nutrition standards

>90%
White bread and buns meet fiber targets

100%
Daily consumption portfolio is free from artificial food dyes

- Found that **small, consistent improvements** in everyday foods can deliver significant population-level impact



"At Grupo Bimbo, we believe that improving everyday foods can have a meaningful impact on how people eat around the world. By **enhancing the nutritional quality** of the products consumers already rely on, we enable **healthier and more convenient meals at scale**—without compromising accessibility or taste."

- **Dr. Patricia Villalobos, Global Research and Development VP**

Case study

Tesco launches personalized Clubcard campaign to help millions eat more fruit and vegetables

Situation

- Tesco is **the UK's largest supermarket** committed to "making healthier, more sustainable choices affordable, accessible, simple and convenient"
- Fewer than **1 in 10** children and **1 in 5** adults eat the recommended **five-a-day fruit and vegetables** in the UK
- Over three-quarters of customers want their **supermarket to help them eat healthier**
- **Cost, convenience and lack of confidence** in the kitchen remain the biggest barriers to healthy eating for families

Approach

- Launched a summer 2025 **campaign** using **Clubcard** and **personalization** to guide customers toward **healthier options**
- Invited 2.4M customers to **earn personalized & convertible Clubcard stamps on fresh fruit and vegetables**
- Launched Clubcard challenges offering **extra points on frozen fruit and vegetables, beans and pulses**
- Introduced new **Clubcard prices on healthy staples** and relaunched **Free Fruit for Kids** (3 weeks)

Results

70%
Customer awareness of the campaign

66%
Customer awareness of the Free Fruit for Kids offer

1.3M+
Pieces of free fruit given to kids across the UK

- Delivered **volume uplift** across **frozen and fresh produce**
- Found **strong customer engagement** and repeated campaign in January 2026

"We're setting out to make **healthy choices easier** every day, starting with new offers and support for families in store this summer. We're bringing customers new ways to **earn Clubcard points** and vouchers as a fun and engaging way to help them towards their five-a-day."
Ashwin Prasad, UK CEO, Tesco

"We are proud of our strong partnership with Tesco which, through the recent series of Health Consultations, uncovered **new and valuable insights** that will inform **Tesco's commitment to healthier diets"**
Elaine Hindal, CEO, British Nutrition Foundation

Case study

Kerry uses Tastesense™ technology to deliver a healthier, sugar-reduced Frozen Lemonade without compromising taste

Situation

- Kerry is a **world leader in taste and nutrition solutions** with a purpose to "Inspire Food, Nourish Life“
- A **leading UK & Ireland QSR brand** needed to **reduce sugar in its Frozen Lemonade** to align with HFSS and sugar tax **regulation**, as well as their own internal nutrition and sustainability strategy. All **without compromising on taste.**
- As a long-standing strategic partner to the brand, Kerry **applied its technical expertise and flavour modulation technologies** to deliver a step change improvement.

Approach

- Assessed the **existing formulation** across sugar content, flavour, calories and environmental impact
- Used **Tastesense Advanced™ technology** to **reduce sugar without changing the taste**
- Delivered a solution that **seamlessly integrated into existing manufacturing processes** with tangible improvements to sugar, calories and sustainability.

Results

50%
Sugar reduction

61%
Carbon reduction

€800k
In annual sugar tax savings (FY 2025)

- Demonstrated that **nutrition and sustainability can be improved simultaneously** through technology-enabled reformulation.
- Delivered a **lower sugar product without compromising on taste**.

Case study

Kerry decodes GLP-1 consumer behavior to unlock new growth opportunities for food and beverage

Situation

- Kerry is a **world leader in taste and nutrition solutions** with a purpose to "Inspiring Food, Nourishing Life“
- The rapid rise of **GLP-1** medications is **reshaping how consumers eat, drink and engage** with food
- Early market data showed reduced food spend and lower calorie intake, but **lacked behavioral depth**
- Kerry developed a research program to understand **the real behavioral shifts** behind GLP-1 users

Approach

- Designed dual-method research; **quantitative** research for US and **digital ethnography** for EU
  - US: Surveyed consumers across current, prior and prospective GLP-1 users to **quantify behavioral and purchasing shifts**
  - EU: Conducted one-week digital ethnography to capture **lived experience** behind the data through diaries, video and tasks
- Integrated both approaches to translate findings into **clear commercial opportunities** for food and beverage customers

Results

- Found GLP-1 consumers **eat less, snack less,** and shift toward **intentional eating**
- **Discovered a decline in sweet preferences,** cravings, and impulse eating
- Identified demand growth for **protein-rich**, **nutrient-dense** products and supplements
- Highlighted unmet needs: **digestive comfort, energy,** and **nutrient intake**

"This work has strengthened how we **support our customers**, reinforcing Kerry's role as a **thought leader** and a **trusted partner** in **sustainable nutrition**."

Sustainable Nutrition Manager, Kerry Europe

The **GLP-1 research** from Kerry was highly relevant for our industry—**insightful, evidence-led** and genuinely thought provoking.

Jessica Martin, Lead Sustainability & Nutrition Manager, McDonalds UKI

Case study

Kerry guides snack manufacturers to nutritionally optimise without compromising on taste

Situation

- Kerry is a **world leader in taste and nutrition solutions** with a purpose to "Inspire Food, Nourish Life"
- **UK HFSS regulations restrict promotional activity**, while evolving EU regulation drives reformulation requirement
- Consumers want **better-for you snacks**, but are **not willing to compromise on flavour**
- Kerry works with **customers across crisps, extruded snacks, nuts, and savoury baked goods** to support nutritional reformulation

Approach

- Kerry's nutrition & regulatory experts **reviewed existing formulations** , **sensory profiles, sodium levels** against regulatory requirements and used **Kerry's nutrition tools** to identify key reformulation focus.
- Leveraged **proprietary Tastesense™ technology** to significantly **reduce sodium** while maintaining consumer sensory experience
- Ran **iterative product development** and sensory validation to protect taste, mouthfeel, and eating experience
- Supported **scale-up with R&D and manufacturing teams**
- Continuing to **support customers with taste technologies** that support further nutrition reformulation, be that protein and fibre fortification, or sugar, salt and saturated fat reduction

Results

Up to 65%
Sodium reduction

- Maintained **expected taste and sensory appeal**
- Supported **multiple product lines** in achieving either non-HFSS status or improved Nutri-Score outcomes
- Unlocked **eligibility for UK in store promotions** and wider marketing activity
- Gave consumers **healthier snack options** that still delivered on enjoyment

"The UK and Ireland **savoury snacking category is highly dynamic**, continuously responding to evolving **consumer demands and regulatory changes**—whether that's increasing protein, reducing salt and fat, boosting fibre, or meeting growing expectations around HFSS legislation, portion control and sustainability commitments.

At Kerry, we are well positioned to help our customers **navigate this complexity**. Our approach is centred on delivering **great taste alongside better nutrition**—underpinned by our industry leading suite of nutrition tools and taste technologies and enabled by lower carbon ingredient options—we can improve affordability, optimise nutrition, enhance convenience and minimise environmental impact across sourcing and production.

What we are hearing clearly from our customers is that **all of these elements are becoming increasingly important, not in isolation but together.** Alongside this, there is a growing expectation for **faster execution in bringing new formats, flavours and reformulated products to shelf,** with stronger alignment from trusted partners—where Kerry can bring real value through our category expertise, scale and collaborative approach."

Mervyn Gribben
Vice President UKI Retail, Kerry

Case study

MIGROS TİCARET A.Ş.

Migros Ticaret launches AI assistant MAYA, an AI-powered wellbeing and shopping assistant

Situation

- Migros Ticaret is a leading food retailer in Türkiye committed to promoting **balanced nutrition**, **healthier choices** and more conscious **daily habits**
- Customers want to eat better but struggle with **meal planning, calculating quantities** and **finding** the right **products**
- Turning healthy intentions into everyday habits remains **time-consuming** and **fragmented**
- Migros Ticaret launched **MAYA,** an **AI assistant** embedded in its **online shopping platform**

Approach

- Built **MAYA** to **recommend personalized meals** and **recipes** based on users' shopping **habits** and **preferences**
- Introduced a **chatbot** to help users **plan weekly menus, estimate portions** and **costs**
- Enabled customers to **add recipe ingredients directly to their** basket in the right quantities, turning meal plans into purchases in **one step**
- Expanded MAYA into a **holistic wellbeing assistant** covering healthy living, parenting, home care and personal care

Results

85k+
Products added to carts through MAYA

7x
Increase in customer adoption since Jan 2025

3%
Share of Migros Sanal Market daily traffic driven by MAYA

- Found that combining **guidance**, **content** and **shopping** in one experience drives healthier choices

"At Migros Ticaret, our ambition is to create customer value not only through access and convenience, but by **helping people make better choices. MAYA** is a strong example of how we are translating that ambition into **measurable digital innovation**. By combining **AI, personalised guidance and seamless commerce**, we have turned the online shopping journey into a platform that **actively supports meal planning, healthier preferences and more conscious consumption**. Importantly, MAYA is not a stand-alone tool; it is a **scalable digital enabler of our Wellbeing Journey Programme**, extending our commitment to balanced nutrition and healthier living directly into customers' daily routines. For us, this is what meaningful innovation looks like: technology that simplifies life, strengthens engagement and advances our wider sustainability and wellbeing goals at the same time."

Süreyya Bayraktaroğlu,
CRM & Marketing Communications Director, Migros Ticaret

Thank you