What We're Watching

06 - 2026

How is the food industry dealing with consumer adoption of benefit stacking[1]?

Stakeholders are in *peak* innovation mode.

- Consumers are increasingly taking a purposeful approach to the foods they eat to support their wellness goals, stacking benefits[1] as they go. Sure, 'avoidance' of certain foods/ingredients remains a key behavior, but the real momentum is behind products – new or reformulated – that 'add' desired benefits to consumers' eating choices.

- The food industry is responding aggressively at pace. Innovation and reformulation activity continued to accelerate in the first-half of 2026, with strong growth in nutrition-oriented claims and increased use of grains and pulses as ingredients that help manufacturers deliver the benefits consumers are actively seeking.

Implications and Opportunities:

- **Innovate** to **align**: products that newly enter – or are reformulated for re-entry - into the marketplace with characteristics aligned to consumer priorities are best positioned to capture consideration.
- The growth opportunity is in 'adding' benefits consumer desire. Where to start? **Satiety**, **Fiber**, **Protein**, **Whole Grain** are top options.
- **Prioritize grains** and **pulses** in product efforts, ingredients that are receiving heightened focus from manufacturers and that can support many of the top priorities consumers are seeking.

1- Ardent Mills Proprietary Research, stacking is the behavior among consumers to prioritize, and participate in, multiple wellness eating behaviors at one time (8.1 on average)

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Grains and Pulses are ingredient assets when aligning to the dynamics that are shaping new product efforts.

F&B manufacturers are responding to shifting consumer priorities by *innovating* – launching both new and reformulated products

New Products

+13%

\# of new product launches

H1 2026 vs H1 2025[1]

Reformulated Products

+16%

\# of product formulation launches

H1 2026 vs H1 2025[1]

Active innovation efforts are being accompanied by claims/positionings that are aligned to consumer priorities

Share of F&B Product Launches with the Respective Claim/Positioning: H1 2026 vs H1 2025[1]

Positioning/Claim*	% Change
GLP-1 Friendly	+67%
High/Source of Fiber	+24%
High/Source of Protein	+18%
Wholegrain	+14%
Digestive/Gut Health	+12%

*non-exhaustive

Priority of looking for foods/ingredients that *add* benefits to support meeting dietary goals is quickly reaching scale

29% of U.S. consumers have started ADDING specific ingredient(s)/foods to their diet for the health and wellness benefits they provide[2]

Behavior that has increased **+38%** in participation since the start of 2026

Avoidance of certain foods/ingredients is measurable and, on the rise, but notably not as quickly as 'adding'

34% of U.S. consumers have started AVOIDING specific ingredient(s)/foods for the health and wellness issues/challenges they introduce[2]

Behavior that has increased **+13%** in participation since the start of 2026

Several grains and pulses are increasingly being leveraged as ingredients in new or reformulated products this year

Share of F&B Product Launches with the Respective Ingredient: H1 2026 vs H1 2025[1]

Ingredient*	% Change
Buckwheat Flour	+101%
Chickpea Flour	+64%
Millet	+23%
Rye	+21%
Lentil	+13%

*non-exhaustive

1- Innova Market Insights, 2- Ardent Mills Proprietary Research, U.S. Adults 18+, specifics of the behavior is defined by the consumer

Ardent Mills