

# What We're Watching

03 - 2026

Food industry stakeholders are starting to prioritize Fiber.

**More relevant yet is to think in terms of *Fiber-Stacking*.**

- ◆ Consumer behavior has already identified Fiber as a lead - and growing - food benefit for 2026. But the emerging trend of consumers prioritizing multiple wellness benefits at one time deepens the opportunity (aka 'stacking'). While more than one-third of consumers currently participate in eating for Fiber, these consumers also adopt as many as **12** other wellness behaviors. Finding products that deliver a combination of Fiber **and** other sought-after benefits is what consumers desire.
- ◆ The opportunity with Fiber is not lost on food industry stakeholders. Nor is the stacking trend. As the share of new products coming to market in 2026 with Fiber increases, so does the rate of complementary benefits included and communicated on pack to attract consumer consideration.

## Implications and Opportunities:

- **Start with Fiber** and then consider the highly complementary benefits that appeal to consumers: **Protein, Whole Grains, Digestive/Gut Health** are among the top options.
- Think Fiber is a benefit that appeals only to 'older' consumers? Think again. Capitalize on the **disproportionate interest** in Fiber among **consumers 18 – 34**, especially when combined with other benefits relevant to this segment of the consumer population.
- **Consider grains** and **pulses** as an ingredient that consumers credit for supporting Fiber: **Barley, Whole Wheat, Chickpeas** can be productive ingredient-starting points.

<sup>1</sup> - Ardent Mills Proprietary Research among U.S. Adults 18+ projects participation growth in the first half of 2026 at +30%

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Delivering Fiber is a compelling start; adding other benefits creates even more opportunity.

More than one-third of consumers prioritize Fiber, and these consumers are particularly active in pursuing wellness through their food choices.

Currently Prioritize Fiber in Daily Eating Behaviors<sup>1</sup>

**38%**

Total Consumers

Average Number of *Other* Wellness Eating Behaviors Participated in among Consumers who Prioritize Fiber<sup>2</sup>

**12.8**

+5 behaviors on average vs total consumers (7.8 average)

Consumers who prioritize Fiber do not stop with that benefit; here are a few of the benefits they 'stack' at well-above-average rates:

Participation Levels in the Respective Eating Behaviors among Consumers who Prioritize Fiber<sup>1</sup>

Eating Behavior*	Participation	Index**
High/Source of Protein	73%	170
Whole Grains	70%	172
Digestive Health	65%	177
Avoid Processed Foods	63%	160
Organic	50%	157

\*non-exhaustive; \*\*compared to the national average

New F&B products launched in 2026 (ytd) have increasingly featured Fiber as a benefit, and a stack of other benefits too.

**+7.2%** share of new products launched with **High/Source of Fiber** claims/positionings: 2026 (ytd) vs 2025<sup>3</sup>

On average the products have included **4.8 additional** wellness claims/positionings<sup>3</sup>

Strong appreciation for Fiber yields a claimed majority- willingness to pay more for grain-based foods that deliver the benefit.

**54%** of total consumers claim they are willing to pay more for grain-based foods that have **high fiber**<sup>1</sup>

Younger consumers (**18 - 34**) report the highest level of willingness of any age group (**59%**)<sup>1</sup>

Considering which benefits to stack with Fiber? Here are some of the most common claims combined with Fiber so far in 2026 (ytd).

Additional Claims/Positionings included on New High/Source Fiber Products 2026 (ytd)<sup>3</sup>

Benefit*	%
Protein	51%
No Additives/Preservatives	42%
Gluten-Free	36%
Digestive/Gut Health	21%
Whole Grains	19%

\*non-exhaustive

2 1- Ardent Mills Proprietary Research, U.S. Adults 18+, specifics of the behavior self-defined by the consumer; 2- Ardent Mills Proprietary Research, U.S. Adults 18+, specifics of the behaviors self-defined by the consumer, considers 50 different eating behaviors; 3- Innova Market Insights, 2026 (ytd) = through mid-April