

What We're Watching

08 – 2025

You already know that Protein and Fiber are hot eating behaviors.

So is Digestive Health.

- ◆ Digestive health is firmly among the top wellness behaviors consumers are prioritizing in 2025. Participation is already significant and poised for continued growth. One key driver is the broad range of benefits consumers associate with Digestive Health, including support for metabolic function, overall wellness, and immunity.¹ Another facilitator? The growing availability of compelling, functional foods that make Digestive Health easier, and tastier, to pursue.
- ◆ Food manufacturers are an active contributor to the rise in Digestive Health opportunities, innovating and launching new products in 2025 at a rate well-above recent years. The benefit is expanding across more food categories, making Digestive Health more accessible and appealing. A common thread among these offerings is the use of grains, pulses, and seeds - ingredients that deliver on taste, performance and health benefits.

Implications and Opportunities:

- Explore Digestive Health options with your food item even if – especially if – it is within a historically **taste-forward** category: the trend is growing dynamically in foods such as **Cookies, Crackers, Bars, Snacks**.
- Looking for **ingredients** with **nutrients** being used to **support** Digestive Health? Check out **Flaxseed, Barley, Oat, Lentil** and **Chickpea** as starting points.

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Foods with nutrients that support Digestive Health have the attention of both food industry stakeholders and consumers in 2025.

About one-third of adults currently eat to support digestive health, participation that will grow into 2026.

Current Participation in Eating for Digestive Health¹

31%

of consumers 18+

Projected Growth in Participation in Eating for Digestive Health¹

+42%

Growth into 2026

F&B manufacturers are racing to connect with rising consumer interest in products that support Digestive Health.

Share of New Products Launched with a Digestive Health Claim/Positioning: 2025 (ytd) vs 2024²

Category*	% Change
Total F&B	+26%
Savory Biscuits/Crackers	+88%
Snack Mixes	+35%
Sweet Biscuits/Cookies	+27%
Cereal & Energy Bars	+8%

*non-exhaustive

Consumer commitment to foods that support Digestive Health result in a claimed willingness to spend more.

57% of consumers claim to be willing to pay more for grain-based foods that support **digestive health**¹

Claimed willingness to pay more is highest among consumers 18 – 34 years old (**64%**)¹

A variety of grain/pulse/seed ingredients are being used in products with a Digestive Health positioning currently in the marketplace.

Among the Most Common^{2*}

- Flaxseed
- Oat
- Brown Rice
- Barley
- Chia Seed

Among the Fastest Growing^{2*}

- Chickpea
- Barley
- Flaxseed
- Lentil
- Oat

*non-exhaustive

When consumers seek foods that support digestive health, a variety of information can influence their purchase intent.

Positive Purchase Intent Based on Product Information

Information*	%**3
source of <i>Fiber</i>	90%
source of <i>Protein</i>	85%
made with <i>Oats</i>	81%
source of <i>Whole Grains</i>	81%
source of <i>Healthy Bacteria</i>	77%

*non-exhaustive; **net of Definitely and Probably Would