

What We're Watching

04 – 2025

The term 'Clean Label' has been around for a while.¹

Clean Label eating behavior is accelerating in 2025.

- ◆ The term Clean Label means a wide variety of things to consumers; there is no singular definition.² But a variety of factors³ are dynamically increasing the ranks of consumers who are prioritizing *Cleaner Eating* in 2025.² Encouragingly, there are multiple ways to connect with the growing interest, including use of grains and pulses as ingredients.
- ◆ The term Clean Label started as a food industry reference¹, and commitment remains strong in 2025. Food industry stakeholders recognize the forces that are pushing the 'movement' forward and a lot of innovation through the first five months of the year has prioritized products with characteristics that consumers consider Clean Label. And many of those efforts are being rewarded with increased consumer consideration.

Implications and Opportunities:

- Prioritize (and communicate) product qualities such as **No Additives/Preservatives, Organic, GMO-Free, Natural Ingredients** – some of the characteristics that consumers use to define Clean Label.
- Looking for ingredients that consumers give immediate credit for facilitating Clean Label? Take a look at **grains** and **pulses**, many of which are **well-known** and viewed as **positive** in **nutrition** among consumers.
- Explore opportunities to tap into Clean Label, especially with menu items or food products developed to appeal to **younger (18 – 34)** consumers.

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1- some sources point to mainstream use of the word starting around ~2005-10 (desktop research, multiple); 2- Ardent Mills Proprietary Research, U.S. consumers 18+; 3- factors include earnest commitment to eating healthier, social discourse around Make America Healthy Again and Ultra-Processed Foods (non-exhaustive)

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Consumer *and* food industry interest in Clean Label is quickening.

Clean Label is an eating behavior of measurable current size and strong future growth.

Current Participation in Clean Label Eating¹

21%

Projected Growth in Participation in Clean Label Eating¹

+62%

Past Year Growth in Social Discussion of Clean Label²

+27%

New F&B product launches in 2025 have focused on four of the core elements of Clean Label eating.

Share of Total F&B Products Launched with Respective Positioning³

Claim/Positioning*	2025 ytd vs 2024
No Additives/Preservatives	+11%
Organic	+9%
GMO-Free	+7%
Natural	+3%

*non-exhaustive

Clean Label is not just for packaged food, many restaurant consumers find the information important.

37% of consumers state that **Clean Label** status is important information to know about menu items.³

Gen Z (44%) and Millennial (43%) place the strongest level of importance on **Clean Label** on the menu.³



Nearly three-quarters of consumers endorse Grains/Pulses as being Clean Label-positive.

71% of consumers agree: Grains/Pulses can play a positive role in **Clean Label** eating.¹

Younger consumers (18 – 34) report the highest levels of agreement (76%).¹



Sales of grain-based foods with 'Natural Ingredients' stated on-pack are growing dynamically.

Unit Sales Last 52 Weeks versus Year-Ago: Products with Natural Ingredients Stated⁴

Category*	Unit Change
Artisanal Prepackaged Bread	+18%
Pretzel	+16%
Shelf Stable Soft-Shell Tortilla	+4%
Prepackaged Cookies	+4%
Frozen Whole Pizza	+3%

*non-exhaustive