

# What We're Watching

06 – 2025

As consumers pursue wellness, they are prioritizing the benefits foods offer.

**Actually, they are stacking them.**

- ◆ Consumer definition of, and approach to, healthier eating are diverse and fragmented. But one unifying aspect is the depth and dimension of the behavior. Consumers no longer identify a single (or even two) priority, they instead adopt a high number of different behaviors and employ them together within a day, a meal or a single product. They stack benefits.
- ◆ Manufacturers are tracking the new behavior and are increasingly developing products to meet the stacked interests of consumers. The share of new F&B products launched in 2025 (ytd) with a wellness claim/positioning is outpacing year-ago levels, **and** the average number of claims/positionings per new product is also on the rise (+4.1%).<sup>1</sup>

## Implications and Opportunities:

- **Maximize** consumer consideration and loyalty by connecting with benefit stacking behavior: **combine** a **foundational** benefit/positioning with **others** that interested consumers are also prioritizing at well-above average levels.
- Evaluate **chickpeas** as an especially **versatile** ingredient that can help support a range of on-trend **benefits**, combined with a strongly favorable impact on customer consideration (63% of consumers agree: *Chickpeas are an up-and-coming ingredient*<sup>2</sup>).
- Consider a 'hot' trend like protein as a target benefit but **look beyond** to **stack** with other benefits fast-growing in both consumer interest and manufacturer focus: Digestive Health, Energy/Alertness, Fiber.

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1- Innova Market Insights (considers Choice, Active, Passive claims/positionings); 2- Ardent Mills Proprietary Research, among U.S. consumers 18+ familiar with chickpeas



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Benefit Stacking is increasing and so is the opportunity to deepen consumer consideration and loyalty.

Benefit Stacking is the behavior among consumers to participate in multiple Better-for-You eating behaviors at one time, often at the same time.

Average number of different eating behaviors\* consumers participate in concurrently



7.6

Benefit Stacking behavior continues to grow.

**+5.6%**  
vs year-ago  
(first half of 2024: 7.2)<sup>1</sup>

\*specifics of the behavior is self-defined by the consumer, considers 48 different behaviors

Nearly three-quarters (73%) of consumers made some sort of change to their eating behaviors in the first half of 2025.<sup>1</sup>

Tactics to improve wellness vary but share one-common characteristic: nearly universally *do-it-yourself*.

New Behaviors*	% <sup>1</sup>
Committed to <b>generally eating better</b>	66%
<b>Added/seek</b> specific ingredient(s)/foods	43%
<b>Avoided</b> specific ingredient(s)/foods	37%
Changed diet to <b>manage/lose weight</b>	34%
Started a <b>structured</b> dietary <b>program</b>	10%

\*among consumers who have made a change

Food manufacturers are accelerating commitment to delivering products with multiple benefits.

**+4.1%**

2025 (ytd) vs 2024 % change in the average number of health and wellness claims/positionings on new product launches.<sup>2</sup>

The average number of claims/positionings on new products has grown to **3.2** in 2025 (ytd).<sup>2</sup>

Which group is most actively 'stacking' eating behaviors and priorities?  
Younger (18-34) consumers.

**8.8**

Average number of eating behaviors participated in concurrently by consumers **18 – 34**.<sup>1</sup>

Consumers 35 – 54 (**7.5**) and 55+ (**6.6**) also demonstrate 'stacking' behavior, but at lower levels.<sup>1</sup>

Looking for a single ingredient that consumers credit for delivering a range of benefits?

You should consider chickpeas.

Chickpeas are...	% Agree* <sup>1</sup>
Rich in nutrients	81%
Source of fiber	80%
Source of protein	79%
Source of vitamins	78%
Naturally Gluten-Free	51%

\*non-exhaustive, among consumers familiar with chickpeas