Consumer Dietary/Eating Trends

First Half: 2025

Ardent Mills

First Half: 2025 Summary

Overview

Consumers remained frenetically committed to adjusting their eating priorities in favor of health/wellness support during the first six months of 2025.

- Nearly three-quarters (71%) of consumers made some sort of change to their eating behaviors.
- Three broad behaviors defined the changes: general commitment to eating better (50%), seeking foods/ingredients that add benefits (39%), avoiding specific foods/ingredients (33%).
- Claimed avoidance of Ultra-Processed Foods is gaining traction with consumers.
- Benefit stacking increased from year-ago (+5.6%) and from the previous six months (+0.7%).

Implications and Opportunities

Acceleration in consumer commitment to eating 'healthier' will offer opportunities to the food industry in the balance of 2025.

- Develop and position products to tap into high-impact consumer eating priorities: established (e.g., Protein, Fiber), emerging (e.g., Positive Nutrition, Clean Label) and even niche (e.g., Regenerative Agriculture, Vegan).
- Monitor developments (regulatory, consumer) with Ultra-Processed Foods; although there's no consensus definition currently consumers are starting to adjust their behaviors at a material scale.

 Ardent Mills Proprietary Research; U.S. consumers 18+; 1- considers 48 different behaviors, specifics of the behavior is self-defined by the consumer

Benefit Stacking

7.6

average number of different eating behaviors consumers participate in concurrently[1]

+5.6%

from year-ago
(first half of 2024: 7.2)[1]

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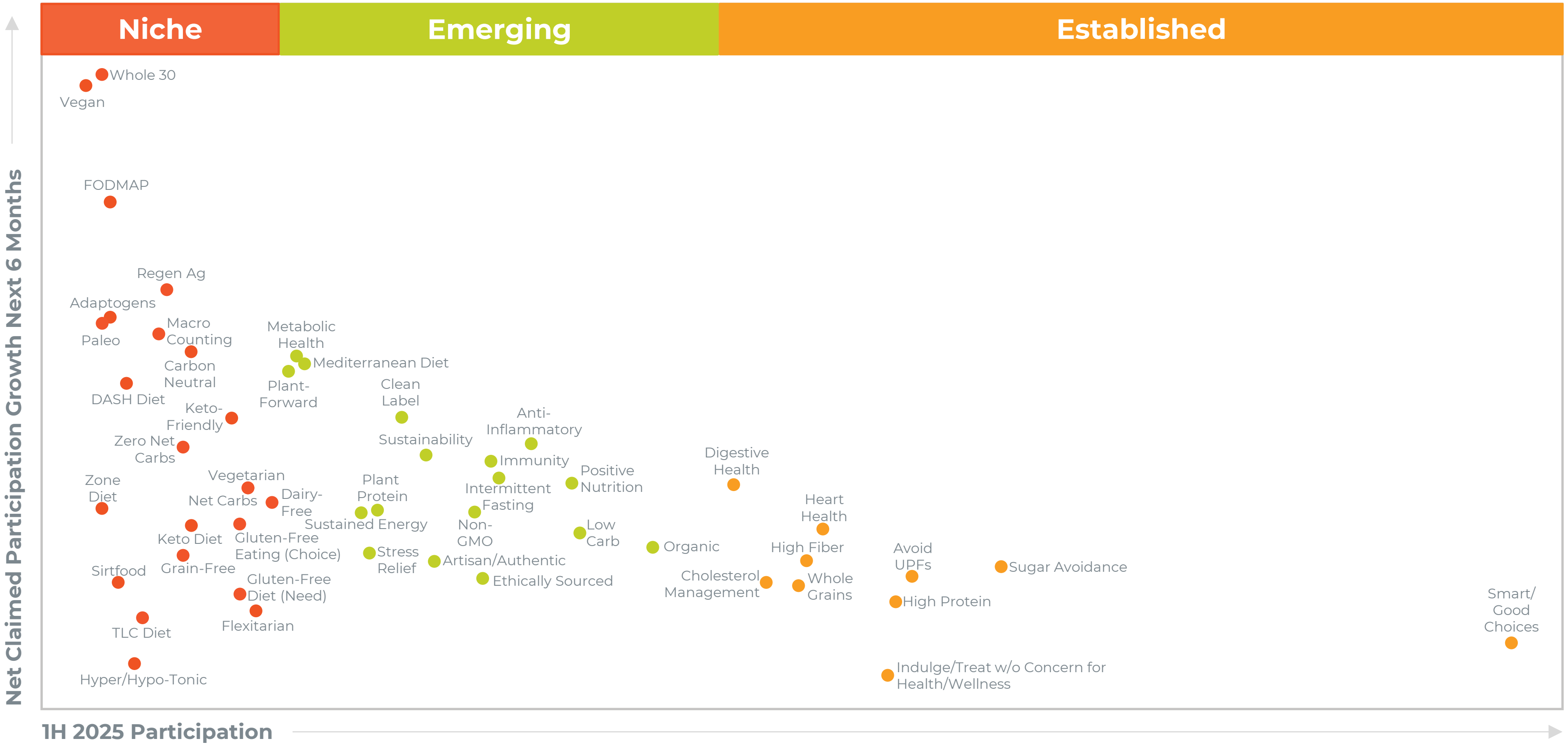
Which behaviors have scale of opportunity with participation size, projected growth – or both?

See the current opportunity landscape below.



! Second Half 2025 Alert!

Eating behaviors perceived to support health and wellness will continue to grow in priority among consumers.

Participation *growth* is expected across a range of wellness eating behaviors: '**Smart/Good Choices**' (+4.8%), '**Whole Grains**' (+18.0%), '**Fiber**' (+23.8%), '**Positive Nutrition**' (+41.7%) and '**Plant Forward**' (+67.5%) to name a few.[2]

At the same time, participation in '**Indulgence without Concern for Health/Wellness**' will *decline* by -2.7%.

Ardent Mills Proprietary Research; U.S. consumers 18+; 1- specifics of the behavior is self-defined by the consumer; participation growth is calculated based on consumer claims about plan to 'continue', to 'start' and to 'stop'; 2- non-exhaustive

Spotlight: Ultra-Processed Foods

While there is no official, regulatory, or even consensus definition, consumers are beginning to form their own perceptions and behaviors.

Here are some things to know about consumers and Ultra-Processed Foods:

UPF Topic is Gaining Traction

Familiarity with the term[1]
72% (+24% from year ago)

Current UPF avoidance participation[1]
38% of U.S. Adults

UPF avoidance participation growth[1]
+20% over the next 6 months

Social discussion[2]
+67% in the past year

Lead Defining Characteristics[3]

Made with additives/preservatives[1]
70% of U.S. Adults associate with UPFs

Multiple processing steps[1]
68%

Made with unrecognizable ingredients[1]
65%

Has extended shelf life[1]
65%

1- Ardent Mills Proprietary Research, U.S. consumers 18+, specifics of the behavior is self-defined by the consumer; 2- Tastewise (U.S.); 3- list provided, non-exhaustive

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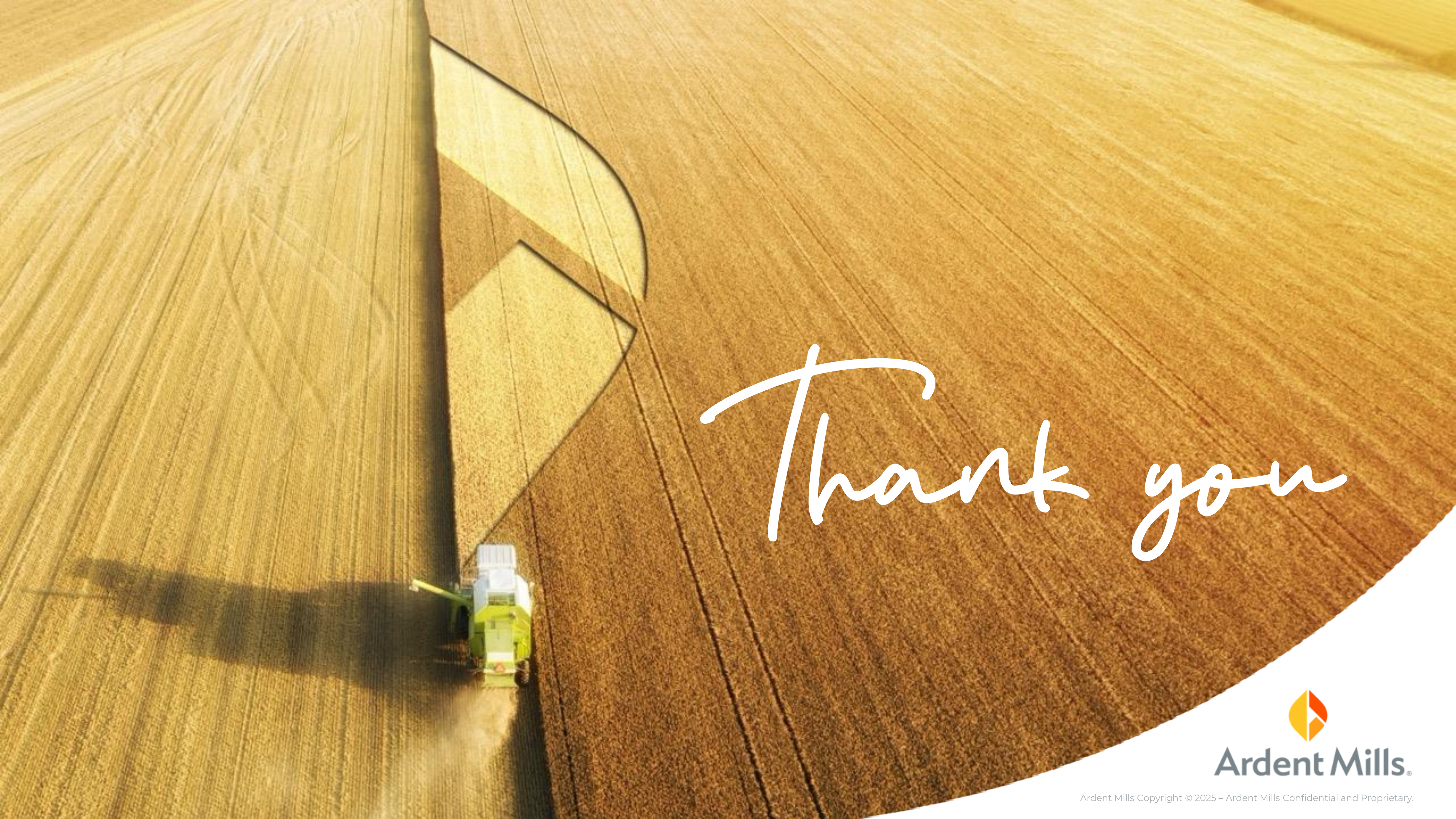

Thank you

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