

What We're Watching

01 - 2026

There's been a lot of talk around Ultra/Highly Processed Foods lately.

One key to offsetting the pressure? Nutritious ingredients.

- ◆ Consumers may not yet have a deep understanding of what defines Ultra/Highly Processed foods – and that's part of the challenge. Only **20%** of U.S. consumers claim to be very knowledgeable about the designation and yet avoidance behavior has reached material scale based on their own perceptions.¹ What leads those self-definitions? Foods with low nutritional qualities. Creating distance from status as a processed food starts with nutritious ingredients.
- ◆ Food industry stakeholders are looking to get ahead of the lack of clarity and consensus agreement around processed foods definition. New product launches in 2025 (and early 2026) featured a significant increase in F&B items positioned against nutrition benefits that counter the processed label: Protein, Plant-Based, Fiber, Whole Grains, No Additives/Preservatives. And the effort is being met by increased sales performance for nutrient dense products across multiple categories of food.

Implications and Opportunities:

- Leverage the **positive** impact of **nutritious ingredients** as a way of offsetting the growing pressure on what consumers might view as processed foods.
- Prioritize **whole grains**. They have **favorable** (and **rapidly growing**) **nutritional** standing with consumers, the food industry and even the new Dietary Guidelines for Americans.
- Develop around the grains and pulses that have captured **increased status** with consumers for their nutritional values: **Wheatberries, Lentils, Chickpeas, Sorghum, Ancient Grains.**

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1- Ardent Mills Proprietary Research, U.S. consumers 18+



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Nutritious ingredients, like grains and pulses, offer a solution to navigate processed food perceptions.

A measurable portion of consumers report they are already avoiding ultra/highly processed foods – a behavior expected to grow in 2026.

Current Participation in Avoiding Ultra/Highly Processed Foods¹

40%

of consumers 18+

Projected Growth in Participation in Avoiding Ultra/Highly Processed Foods¹

+41%

Growth through the first half of 2026

Consumers consider many factors when determining how processed a food is and the top five relate to nutrition and ingredients.

% Associate with Ultra/Highly Processed Foods²

Characteristic*	%
Low Nutritional Qualities	88%
Additives/Preservatives	87%
Extended Shelf-Life	85%
Multiple Processing Steps	84%
Unrecognizable Ingredients	84%

*non-exhaustive

Whole grain claims/positioning on new product launches made a strong comeback in 2025 and are accelerating in early 2026.

+18% Increase in new product launches with **whole grain** positioning/claim: 2025 vs 2024³

Through the first three weeks of January 2026 the rate is pacing at a **+40%** rate from 2025³

A closer look at consumer social discussion about which ingredients are 'nutritious' shows increased interest in several grains and pulses.

Year-over-Year Change in Social Discussion about the Ingredient within the Context of 'Nutritious'^{4*}

- Wheatberries (+115%)
- Sorghum (+33%)
- Whole Grains (+98%)
- Ancient Grains (+12%)
- Chickpeas (+54%)
- Lentils (+9%)

*non-exhaustive

Products that are 'Nutrient Dense' are growing in purchase consideration and are outpacing their counterparts.

Last 52 Weeks Unit Sales % Change Based on 'Nutrient Dense Qualified' Characteristic⁵

Subcategory*	With Characteristic	Without Characteristic
Sandwich Prepackaged Bread	+5.0%	-5.9%
Shelf Stable Main Course	+4.6%	-2.0%
Cereal	+1.6%	-0.5%
Plant Based Salty Snacks	+1.4%	-4.6%
Shelf Stable Beans	+0.6%	-1.5%

*non-exhaustive

2- Ardent Mills Proprietary Research, U.S. consumers 18+, specifics of the behavior self-defined by the consumer; 2- Ardent Mills Proprietary Research, U.S. consumers 18+; 3- Innova Market Insights; 4- Tastewise (U.S. food); 5- Byzzer/Nielsen, Total FMCG, Last 52 Weeks through 12-27-25, includes products that are 'Nutrient Dense Qualified' or 'Non-Applicable' on that characteristic

