Turning Disruption into *Opportunity*

Ardent Mills

Focusing on Whole Nutrition Amid Shifting Consumer Eating Priorities

External disruptors like GLP-1s, a focus on reducing ultra-processed foods (UPF) and a desire for cleaner labels have shifted consumer priorities and transformed the current moment into one of the more dynamic periods in our industry.

Ardent Mills took a deep dive into what consumers think, seek to include and look to avoid as they focus on achieving their health goals.

What did we learn?
Change doesn't have to be negative - it can offer opportunity when we focus on what consumers really want.

Here, we share the insights – and opportunities – that are driving the conversation.

1. Starting on common ground: Most consumers are chasing the same goals.

2. Ingredients matter a lot: Consumers trust and turn to familiar favorites.

3. A new way of eating: GLP-1s are shifting how consumers eat and interact with food.

4. When less is more: The tide is turning toward reducing the amount of processing in the foods we eat.

5. Simple and straightforward are on the rise: Cleaner labels matter.

6. Where brands can win: Actionable insights for today and tomorrow.

1. Starting on Common Ground

Eating Healthy or Healthier is a TOP priority even though consumers reveal they have little idea of how to specifically achieve it, especially in the context of eating for a GLP-1 friendly lifestyle, clean label goals and minimzing ultra processed foods.

Key Findings

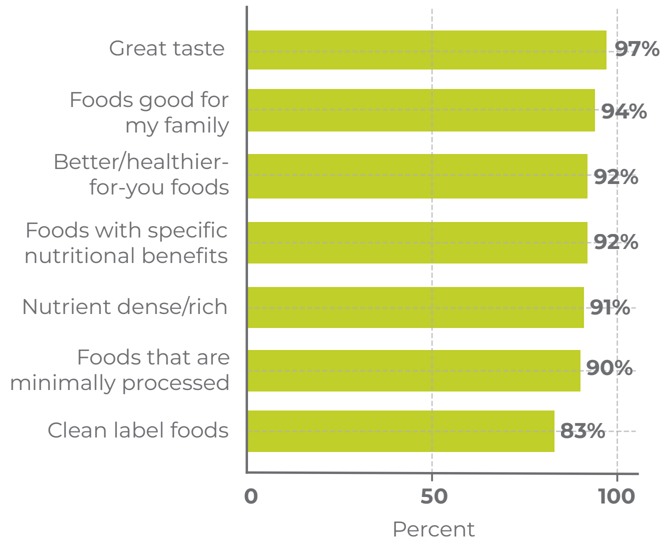
- Consumers are **actively adjusting** their eating priorities in favor of health/wellness.
- By some measures, healthy eating has become **as important** in priority as great taste.
- There's **no singular definition** on how to achieve healthy eating. In fact, consumers rely on a high number of different behaviors to achieve the goal.
- Healthy eating may be a priority, but it's one that consumers are pursuing **without** deep **knowledge** or strong **confidence**.

73%

of US consumers have changed eating behavior in favor of eating for health and wellness so far in 2025.

Healthy eating (in a variety of forms) is starting to rival great taste in importance

Important to Daily Eating/Dietary Goals and Priorities[1]



Consumers are participating in multiple healthy eating behaviors at one time, often at the same time – the average is 7.6 different 'stacked' behaviors.

Benefit Stacking Examples: Above Average Participation/Priorities[2]

Clean label eaters also prioritize...	*Minimize UPFs eaters also prioritize...*	*Weight management eaters also prioritize...*
• Avoid Ultra Processed Foods	• High Protein	• Low Sugar/Sugar Avoidance
• Organic	• Digestive Health	• High Protein
• High Protein	• Heart Health	• Low Carb
• Ethically Sourced Foods	• Whole Grain Foods	• Cholesterol Management
• Digestive Health	• High Fiber	• Digestive Health
• High Fiber	• Organic	• High Fiber
• Whole Grain Foods	• Positive Nutrition	• Avoid Ultra-Processed Foods
• Non-GMO	• Sustainably Grown Foods	• Whole Grains

Consumers reveal they are neither especially knowledgeable or confident when it comes to healthy eating, despite its stated importance.

Eating Healthy: Consumer's Understanding

KNOWLEDGE[3]	CONFIDENCE[3]
26%	**31%**
Net: 91%	Net: 95%

Percent of US adults

2. Ingredients Matter... A Lot

Consumers are building their healthy food choices from the bottom up - the sum of the parts is now greater than the whole – giving brands an opportunity to celebrate whole nutrition and showcase ingredients.

Key Findings

- Ingredients have become a **highly impactful** factor in healthy eating decisions, often the **first factor considered**.
- Grains and pulses are given majority endorsement as a **contributor** to healthy eating overall, and as a **solution** for most disruptors.

63% of US consumers check the ingredient list information at least occasionally.

Ingredients are influencing the food choices of nearly all consumers.

85% of US consumers claim that 'ingredients' play a direct role in the foods they choose to buy/eat.[4]

Nearly one-half (46%) of these consumers: 'purposefully seek out foods that include grains'[5]

Characteristic	% Agree Grains/Pulses deliver these characteristics[6]
Providing FIBER	91%
GOOD for my BODY	89%
NUTRIENT RICH/DENSE diet	88%
SATIETY	85%
CLEAN LABEL eating	79%
Providing PROTEIN	75%
MINIMALLY PROCESSED	61%

3. A New Way of Eating

Satiety is a consumer 'holy grail' but **achieving it through 'natural' methods is far-more favored than through GLP-1 medications.**

Key Findings

- GLP-1s are having on impact on eating behaviors: projected -1.33% calorie **reduction** in the total adult eating US.
- Adoption continues to rise and so does **'open-minded' consideration.**
- But satiety – the benefit GLP-1s deliver related to weight management – is significantly more preferred by consumers within more **natural** solutions.

GLP-1 Participation

Current Participation

7%

Participation Growth in 2025

29%

Social Discussion Growth

+417% past year[7]

Importance of Satiety to Eating Goals

+84%

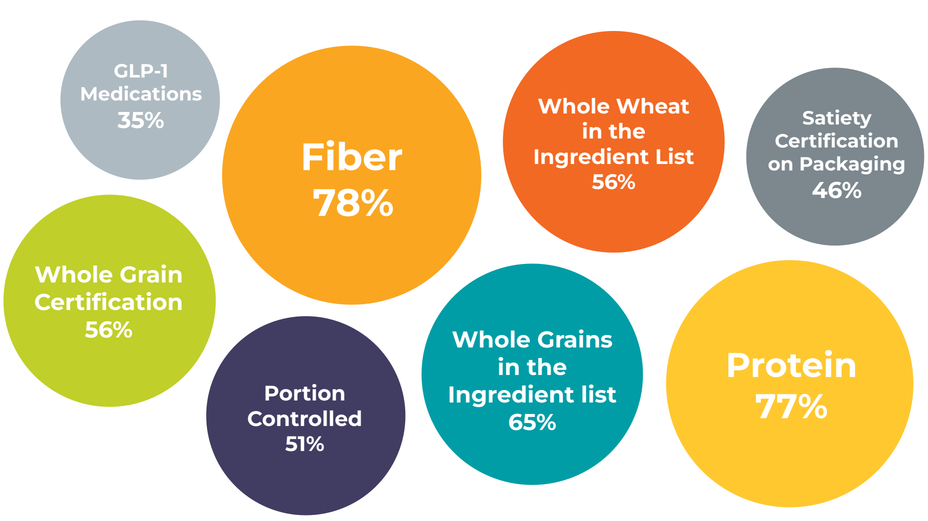
There has been a recent shift from rejection to open-mindedness about possibly taking GLP-1 medications.

Engagement Stance[9]	Jan 24	Jun 24	Sep 24	Dec 24	Apr 25	*Notes of Interest*
UNAWARE of the topic	16%	9%	9%	9%	9%	*Awareness of the topic remains nearly universal*
Currently TAKE	2%	5%	5%	6%	7%	*Equal to ~19m adults 18+; prioritizing foods with hydration, vitamins, protein, nutrients*
Did take but QUIT	–	2%	4%	4%	3%	*Quit rate remains high: 31% - mostly due to safety concerns, cost*
PLAN to START next 6 months	3%	1%	3%	3%	2%	*Short-term committed participation growth remains marginal*
Would CONSIDER in the FUTURE	24%	25%	26%	34%	32%	*Non-committed openness to use is on the rise*
Would NEVER CONSIDER	54%	58%	53%	44%	47%	*Rejection of the idea has declined materially*

When it comes to satiety, consumers prefer 'natural' solutions to GLP-1s and associate it with certain characteristics like fiber and protein.

Characteristics Associated with Satiety[10]

(the quality of feeling fullness and satisfaction that signals you to stop eating)



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4. When Less is More

There's no consensus on what defines ultra-processed foods, but that doesn't mean consumers haven't started to define – and minimize – them.

Key Findings

- Ultra-processed foods are on the **minds** of consumers.
- Specific knowledge of what are (and are not) ultra-processed foods is **very shallow** among consumers.
- Resulting definitions are especially **wide-ranging.**
- **Nutrition** and **ingredients** are the most effective offsets to Ultra-Processed status.

UPF Participation

Currently Avoid
38%

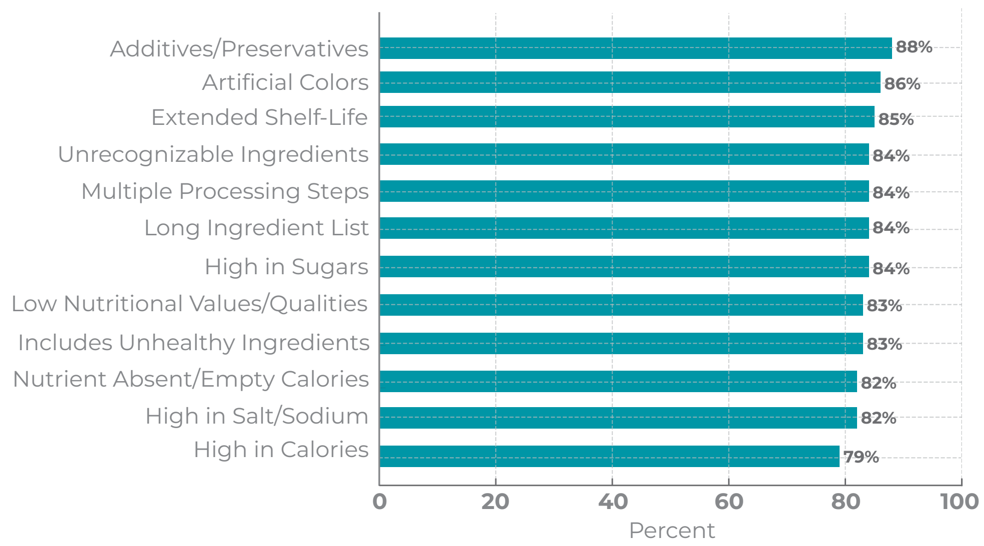
Avoidance Growth in 2025
+20%

Social Discussion Growth
+101% past year[7]

Important to Avoid as a part of Eating Goals
90%

Consumers have an especially deep set of characteristics that they use to define ultra-processed foods; most include ingredient considerations.

Characteristics Associated with Ultra-Processed Foods[11]



Although 3/4s (72%) of consumers claim to be familiar with UPFs, most of the knowledge is shallow.

Only 20% **of US consumers claim they are 'very familiar/ knowledgeable' about ultra-processed foods.**

Another 52% are 'somewhat familiar/knowledgeable'[12]

5. Simple and Straightforward are on the Rise:

There's lots of variability to a consumer definition of clean label, but **one consistent cornerstone appears: ingredients.**

Key Findings

- The consumer definition of what constitutes clean label is especially **fragmented.**
- And specific overall knowledge about clean label is very **limited**.
- But consumers are **increasingly** prioritizing the behavior of clean label eating.
- Ingredients play a central and consistent role in the **defining** and **enabling** of clean label eating.

Clean Label Participation

Current Participation
22%

Participation Growth in 2025
+62%

Social Discussion Growth
+27% past year[7]

Important to Eating Goals
83%

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The clean label definition includes several factors, but **ingredient dynamics sit squarely at the top of the list.**

Characteristics Associated with Clean Label Foods[13]

94% Food Good for My Family	**93%** Made with Simple/ Ingredients	93% No Additives/ Preservatives	**91%** Ingredients You Recognize	91% All-Natural	**90%** Minimally Processed Ingredients
87% Limited # of Ingredients	83% Organic	81% GMO-Free/ Non-GMO	**81%** Overall Better-for-You	**78%** Favorable Nutritional Profile	**77%** Nutrient Dense/Rich

Consumers have limited knowledge about the term clean label.

Only 10% **of US consumers are 'very familiar' with clean label foods.**
Another 42% are 'somewhat familiar'[14]

6. Where Brands Can Win

Actionable Opportunities for Growth, Today and Tomorrow

The bottom line for CPG brands and manufacturers is that there is a role to play in shaping how consumers define and achieve the healthier lifestyles they're craving.

The answer? Whole nutrition built from the bottom up, powered by ingredients.

1. Embrace the opportunity to educate consumers about the specific ingredients in your formulations and the nutritional characteristics they provide. Emphasize what matters to them – protein and fiber-full ingredients.

2. Place ingredients at the center of your innovation strategy. By reformulating or integrating whole grains and pulses into your products, you can check many of the boxes that are driving consumer interest and purchases. Ready to learn more about innovating with the ingredient experts at Ardent Mills? Learn more.

3. Prioritize maintaining great taste across your portfolio. While healthy eating is a priority, taste is still king. Be sure to work with a supplier who can support testing and product development that maintains – or even improves – the sensory experiences you're providing. Learn more.

4. Stay close to evolving consumer priorities. Even though the consumer mindset is always changing, there is no reason you can't be one step ahead. The Ardent Mills insights team regularly conducts consumer and marketplace studies to help our customers stay connected to what matters most in product development and portfolio management. Learn more.

5. Words matter. No matter what consumer segment you're seeking to attract, there are cues and terminology that inspire confidence and curiosity on shelf. Ensure you're highlighting the most relevant characteristics and benefits so that your products stand out.

If you're ready to transform today's eating trends into lasting opportunities for your brand, let's connect. Ardent Mills is here to help you optimize the ingredients you need to engage consumers, sell your products, and earn trust.

Contact us at info@ardentmills.com or 866-933-2974.

* Ardent Mills Proprietary Research; US consumers 18+; specifics of the behavior are self-defined by the consumer.
1. Sum of Very and Somewhat Important; bolded results are above average for the measure / Q. How IMPORTANT are the following behaviors to your personal eating/dietary GOALS and PRIORITIES?
2. Considers 48 different behaviors, shown are behaviors that each Eater group over-indexes in participation by 150 or > compared to the national average; non-exhaustive / Q. What is your personal participation status when it comes to the following DIETARY/EATING behaviors? (results for currently participate and plan to continue shown)
3. Sum of Very and Somewhat / Q. How KNOWLEDGEABLE do you believe you are about EATING HEALTHY or HEALTHIER?, Q. How CONFIDENT are you in your ABILITY and KNOWLEDGE to effectively EAT HEALTHY or HEALTHIER?
4. % 'Yes' among consumers who check on-pack information at least occasionally.
5. Among consumers who check ingredients at least occasionally, net of Strongly and Somewhat Agree / Q. When choosing the types of foods you eat do the ingredients play a role in your decisions, Q. How much do you agree with the following: I purposefully seek out foods that include grains
6. Net of Strongly and Somewhat / Q. How much do you agree or disagree with the following statements about the role that GRAINS/PULSES play in your diet/eating behaviors?
7. Tastewise (US).
8. Refers to the medications.
9. Consumer-self reported results based on their own respective knowledge and experiences with the topic / Q. When thinking about GLP-1 medications, which of the following best describes your interest or intention relating to using them yourself?
10. Sum of Very and Somewhat, non-exhaustive – only top responses shown / Q. How strongly do you personally associate the following characteristics with SATIETY (the quality of feeling fullness and satisfaction that signals you to stop eating)?
11. Sum of Very and Somewhat, non-exhaustive – only top responses shown / Q. How strongly do you personally associate the following characteristics with ULTRA-PROCESSED FOODS?
12. Sum of Very Familiar and Somewhat Familiar / Q: As it relates to FOOD, how FAMILIAR are you with the term: ULTRA-PROCESSED?
13. Sum of Very and Somewhat, non-exhaustive – only top responses shown / Q. How strongly do you personally associate the following characteristics with CLEAN LABEL FOODS?
14. Sum of Very Familiar and Somewhat Familiar / Q: As it relates to FOOD, how FAMILIAR are you with the term: CLEAN LABEL?