THE NEW FOOD NARRATIVE: ULTRA-PROCESSING, SWEETENERS, AND SKEPTICISM

2026

Based on H2 2025 Data

BRIGHTFIELD GROUP

About Brightfield Group

Brightfield Group's AI-driven consumer insights and social listening help marketing and innovation teams see the person behind the trend.

Informed by predictive AI integrated with **survey** and **social media** data, our data has the answers innovators need to make decisions confidently.

Problem	Solution BRIGHTFIELD GROUP	Outcome
I need more customers	Category-specific consumer insights across brands and channels	Double your customer base!
I don't know what product to develop next	Social listening into trending products, flavors, and ingredients + actual consumer adoption across trendy & traditional segments	New product development that is 10x more efficient!

Methodology Overview

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Built by insights people for insights people!

SURVEY DATA + **SOCIAL LISTENING**

Over 90,000 consumers surveyed

- Questionnaire fielded quarterly since Q3 2021 with dynamic edits to account for the latest trends over time
- Quotas & weighting were used to achieve a nationally representative sample, including age, gender, income, & region
- Wellness-oriented questions that reveal attitudes, behaviors, & purchasing of hundreds of products

Social listening:

- Over 100 million conversations collected since 2020 & growing panel of 80,000+
- Posts pulled based on wellness-focused hashtags & topics
- Posts tagged by Need State, Product, Ingredient, Flavor, & Condition using AI-enabled machine-learning & natural language processing
- Neural network training to help AI predict gender, age, and persona

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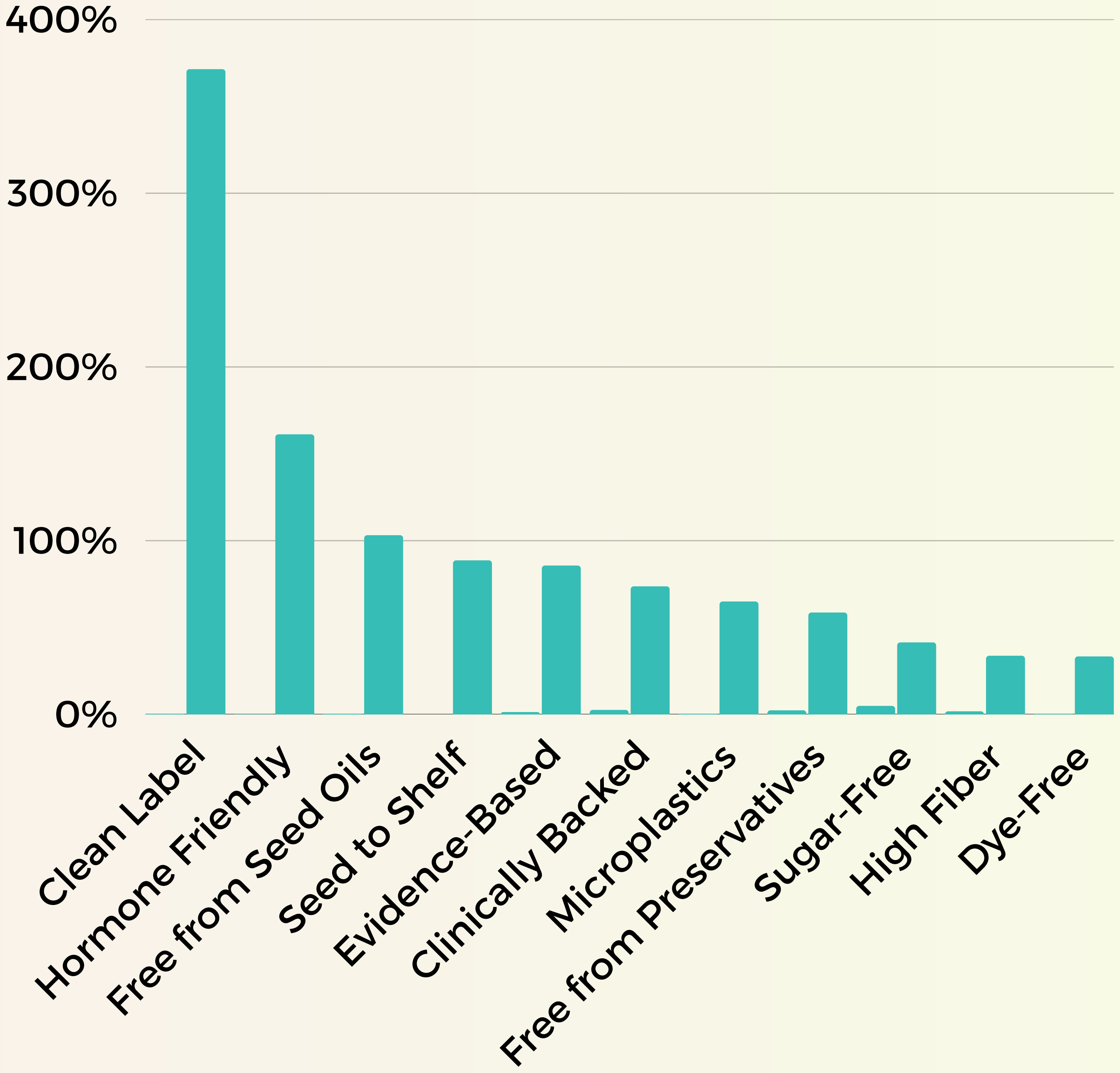
Snacking Scrutiny on the Rise: Snacks Now a Broader Health Risk Conversation

As food quality moves to the center of public health conversations, consumers are reevaluating what belongs in their daily snacks. New federal dietary guidance — including an updated food pyramid that emphasizes whole foods, protein, healthy fats, and reduced reliance on ultra-processed foods and added sugars — has intensified scrutiny of packaged snacks and their ingredient lists.

Across the snack aisle, the "no-go" list continues to grow. Artificial dyes and sweeteners, preservatives, seed oils, heavy metals, and microplastics are increasingly viewed as long-term health risks rather than acceptable tradeoffs for convenience. As a result, consumers are balancing protein, satiety, and transparency with a broader sense of health impact.

Our consumer research and social listening show this shift accelerating. Clean-label positioning is no longer a niche wellness signal, it is increasingly aligned with mainstream nutrition guidance and public policy narratives, leading all label claims in social growth over the course of 2025. Interest in simple formulations, reduced processing, and trusted ingredient is clearly gaining momentum.

Top Growing Claims



Brightfield Group; Wellness CPG Social Listening January 2025 - December 2025

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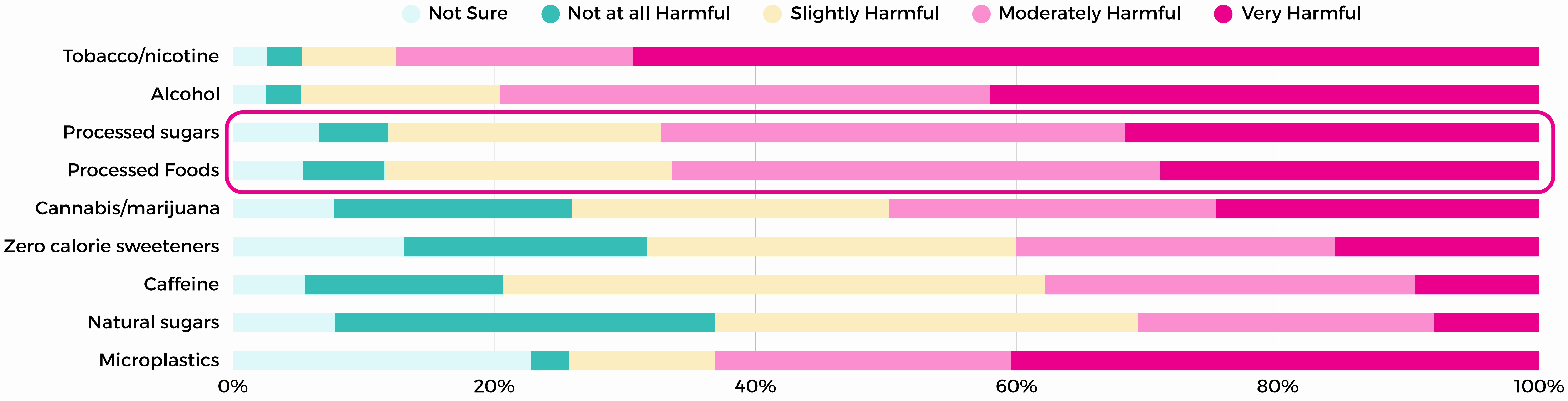
Skepticism Goes Mainstream: Processed Foods Widely Seen as Requiring Increased Scruitiny

65% Support Increased Scrutiny of Ultra-Processed Foods

60% Worry About the Impact of Microplastics

Processed foods and sugars are now widely viewed as moderately to very harmful, placing them on par with widely debated substances like cannabis and caffeine.

Product Harm Perception



Source: Brightfield Group; Wellness CPG Consumer Insights; H2 2025

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Ultra-Processed Avoiders Are a Large, Affluent, Influential Segment

26.3% of Q4 2025 respondents stated that they are looking for “Not Ultra-Processed” food products when making a purchase.

- **Higher Income and Education Skew:** Ultra-Processed Avoiders are more likely than the general population to be upper income and to hold a Bachelor’s or graduate degree, while lower-income and lower-education groups are underrepresented.
- **Older Generational Profile:** Baby Boomers and Gen X account for a larger share of Ultra-Processed Avoiders compared to the total population, while Gen Z represents a smaller share.
- **Suburban and Child-Free Households:** Ultra-Processed Avoiders are more likely to live in suburban areas and in households without children, compared with the overall respondent base.

26.3% actively look for “Not Ultra-Processed” food products

35.0% are upper income

40.9% hold a Bachelor’s degree or higher

57.6% are Gen X or Baby Boomers

40.7% live in suburban areas

51.1% are female

40.7% live in suburban areas

23.9% have adult children

Source: Brightfield Group; Wellness CPG Consumer Insights




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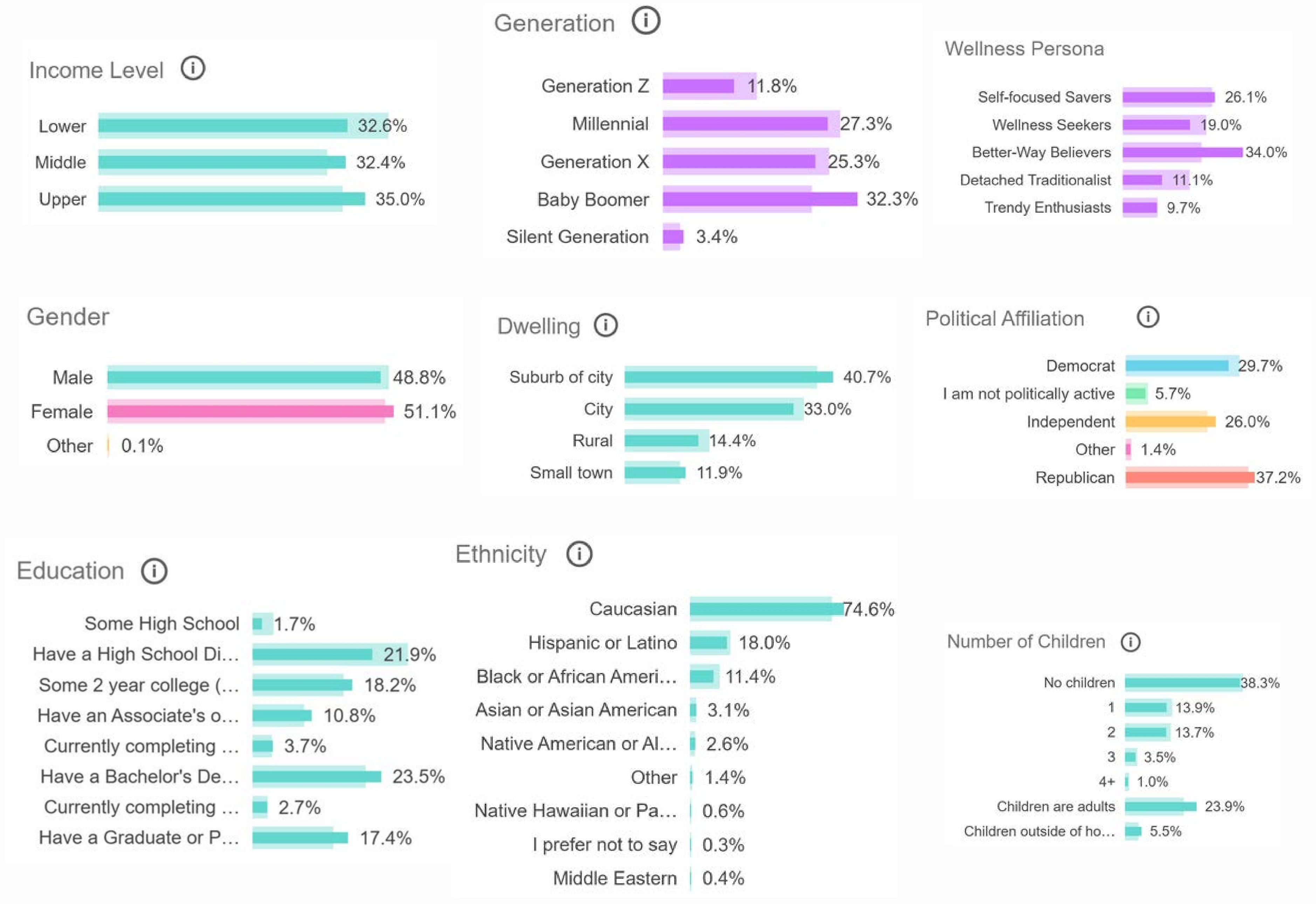
FROM THE PORTAL

Those who often avoid ultra-processed food (darker bar) versus total population (lighter bar)



FILTERABLE DATA HELPS YOU FIND THE TRENDS FAST IN BRIGHTFIELD'S WELLNESS CONSUMER INSIGHTS PORTAL

Source: Brightfield Group; Wellness CPG Consumer Insights

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Consumers Are Defining “Better” by What’s Removed: Shoppers Define Quality by What Products Leave Out

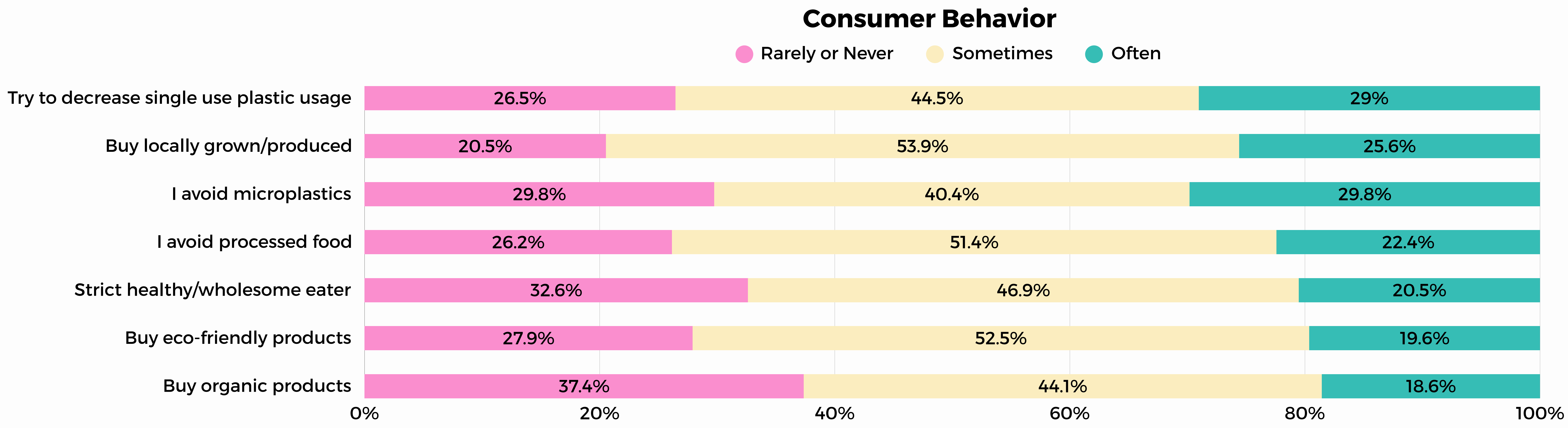
37.7% seek No Added Sugar

34.9% Made with Real Food Ingredients

34.5% All Natural

34.1% No Added Sweetener

More than a quarter of consumers say they are actively reducing plastic use and avoiding processed foods.



Source: Brightfield Group; Wellness CPG Consumer Insights; H2 2025

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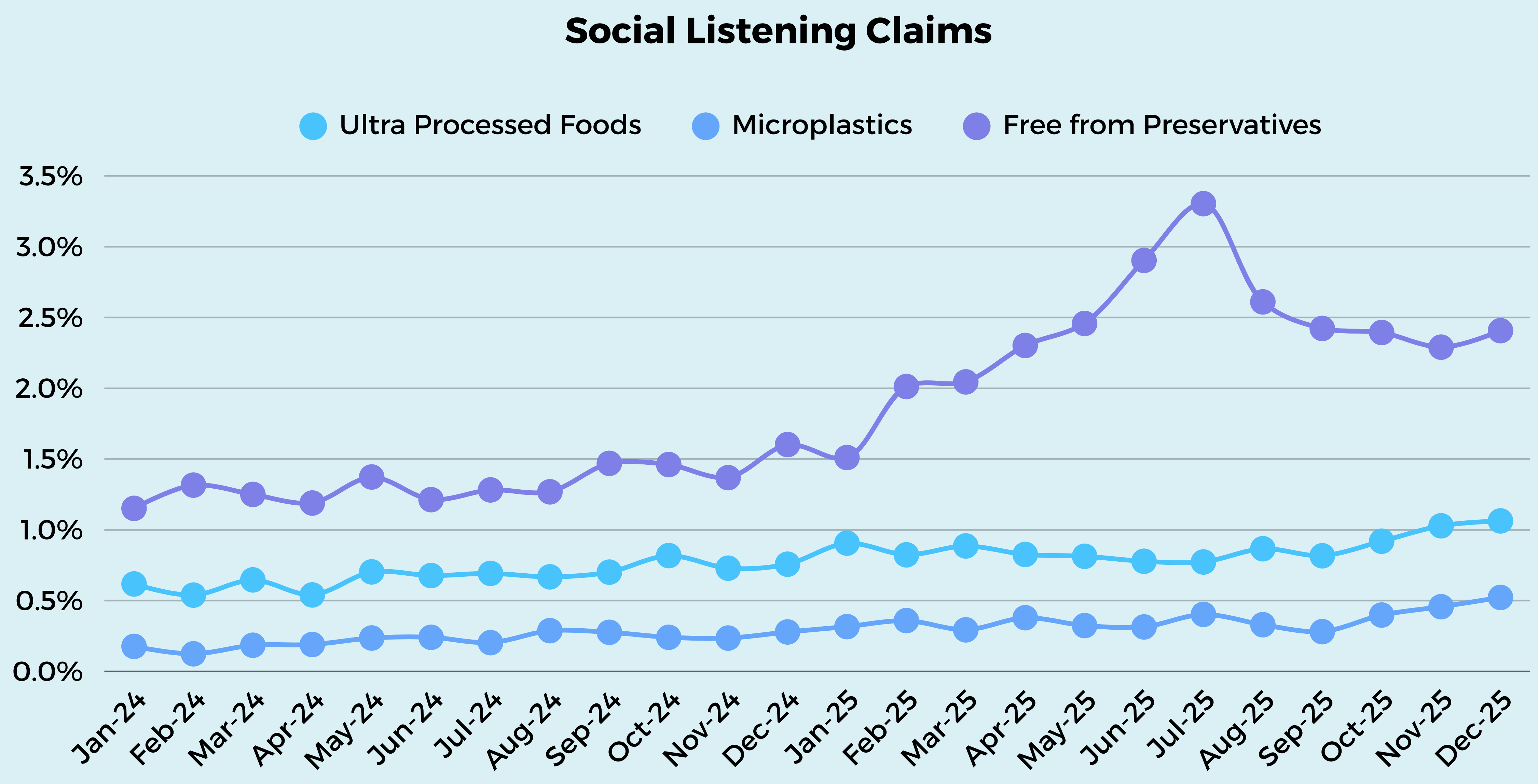
“Ultra-Processed” Is Being Talked About Like a Toxin

Since the start of 2024, ultra-processed food share of voice has nearly doubled, from 0.6% to 1.1%, reflecting +72% growth. This puts it on a fast convergence path with more established narratives like Free from Preservatives, which has also seen rapid growth. Meanwhile, Microplastics is one of the fastest growing claims, increasing by +196% over the past two years.

Growth across these claims reflects a growing skepticism of artificial ingredients in foodstuffs, with focus more on additives than specific health ingredient claims (i.e. low sodium).



Ultra Processed Foods +72.1% (1.1% SOV)

Microplastics +195.7% (0.5% SOV)

Free from Preservatives +109.0% (2.4% SOV)

Jan 2024-Dec 2025 Growth Data Displayed; Dec 2025 SOV Displayed

Source: Brightfield Group; Wellness CPG Social Listening; January 2026

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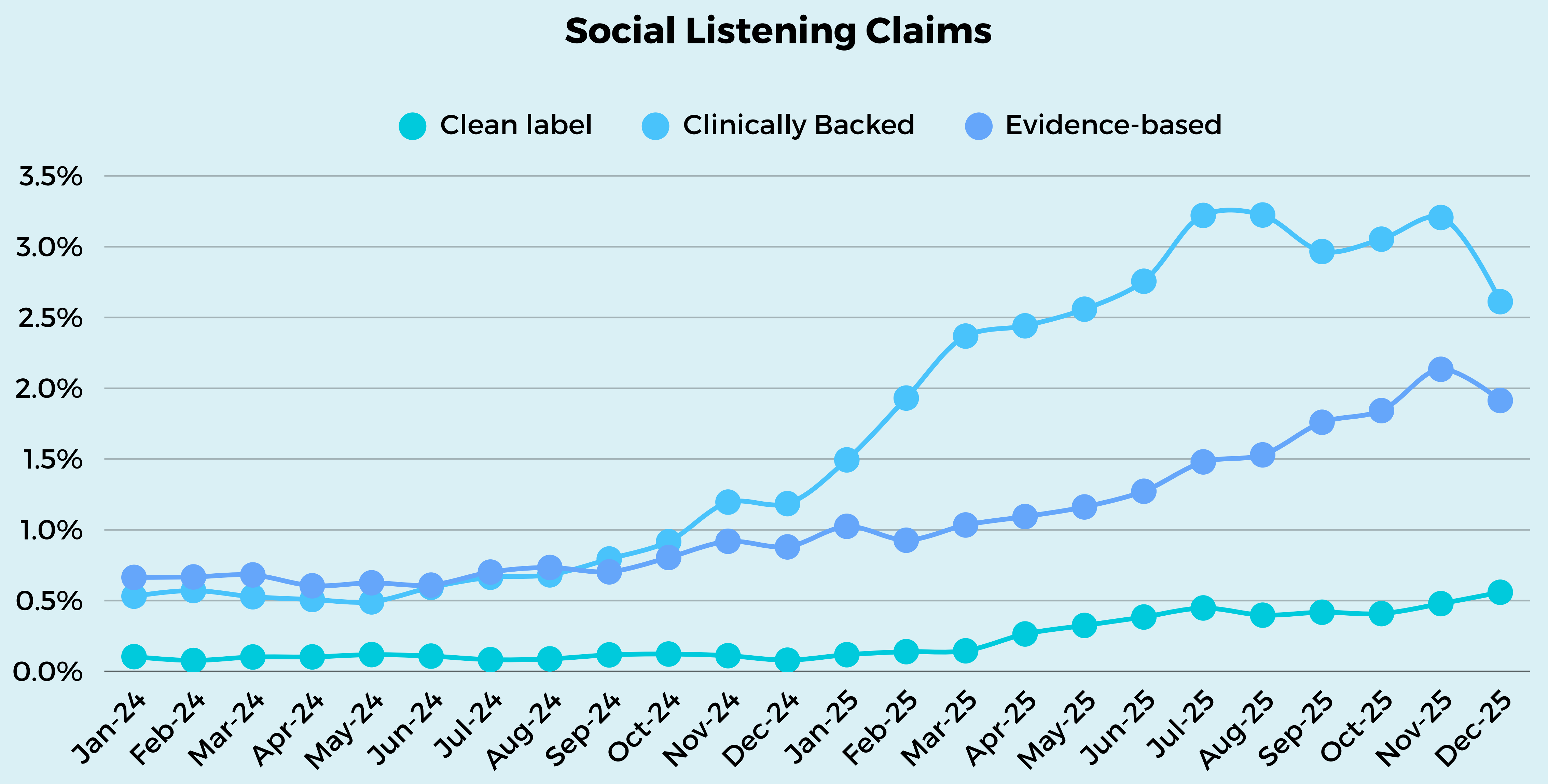
Interest in Trusted Products on the Rise

Social conversation around trusted product claims has accelerated sharply, with Clean Label, Clinically Backed, and Evidence-Based all posting triple-digit growth. Clean Label has seen the fastest expansion, though it remains relatively niche at 0.6% share of voice while Clinically Backed is more established.

Rather than relying solely on aspirational or “natural” framing, consumers are increasingly responding to proof-oriented cues—clinical substantiation, evidence standards, and transparent formulation—as markers of legitimacy in a crowded wellness landscape.



Clean Label +437.2% (0.6% SOV)

Clinically Backed +391.5% (2.6% SOV)

Evidence-Based +188.1% (1.9% SOV)

Jan 2024-Dec 2025 Growth Data Displayed; Dec 2025 SOV Displayed

Source: Brightfield Group; Wellness CPG Social Listening; January 2026

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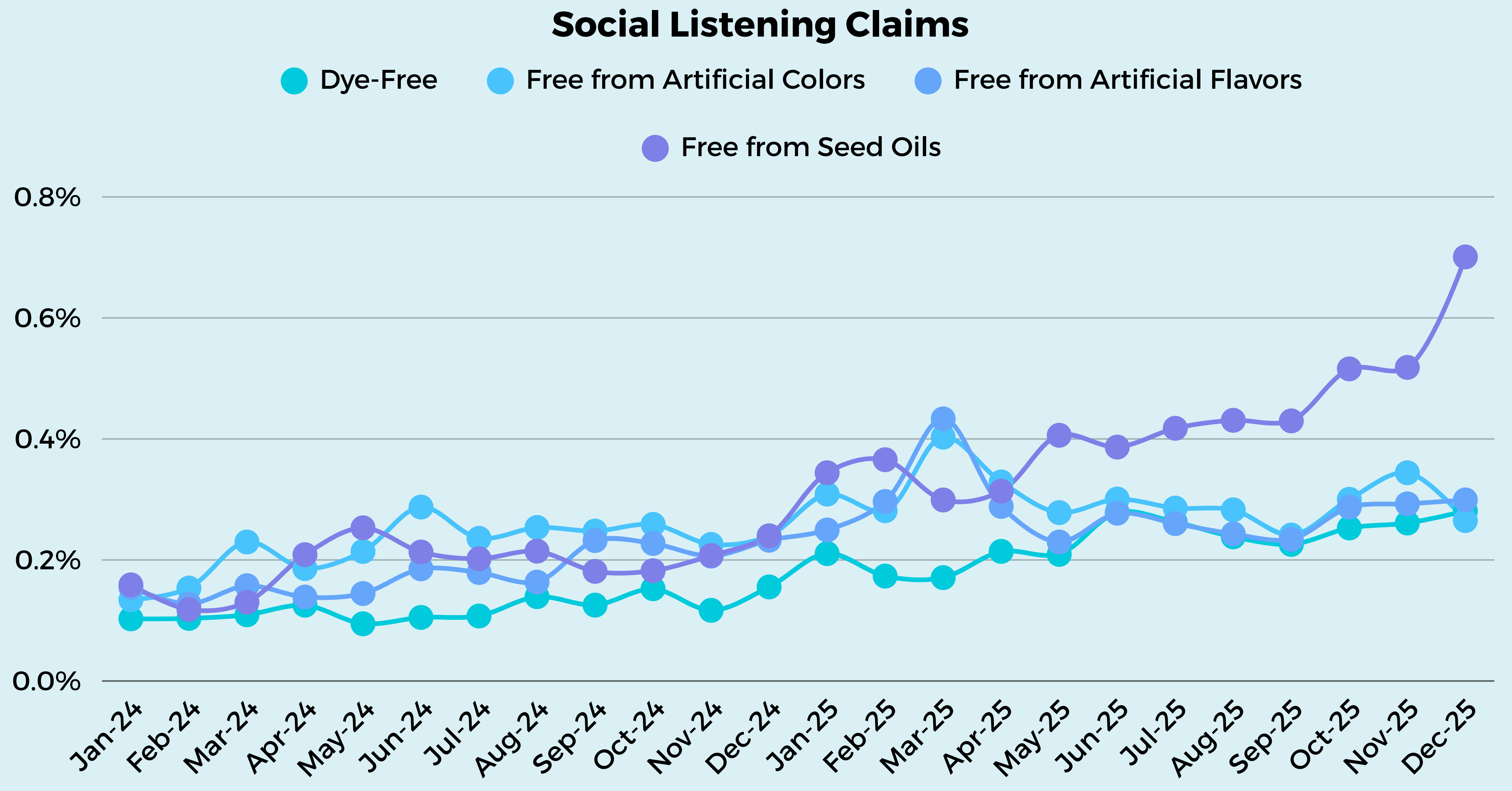
Certain “Free From” Claims Explode

Buzz around “Free From” claims has surged, led by Free from Seed Oils, which has posted outsized growth and has the highest share of voice. Dye-Free and Free from Artificial Colors and Flavors have also seen rapid acceleration, though all remain smaller narratives in absolute terms.

This pattern suggests consumers are moving beyond broad clean-label language toward more specific ingredient exclusions, particularly those tied to skepticism around processing methods and industrial inputs, functioning as shorthand for avoidance of perceived modern food risks.



Dye-Free +173.5% (0.3% SOV)

Free from Artificial Colors +97.5% (0.3% SOV)

Free from Artificial Flavors +93.4% (0.3% SOV)

Free from Seed Oils +341.2% (0.7% SOV)

Jan 2024-Dec 2025 Growth Data Displayed; Dec 2025 SOV Displayed

Source: Brightfield Group; Wellness CPG Social Listening; January 2026

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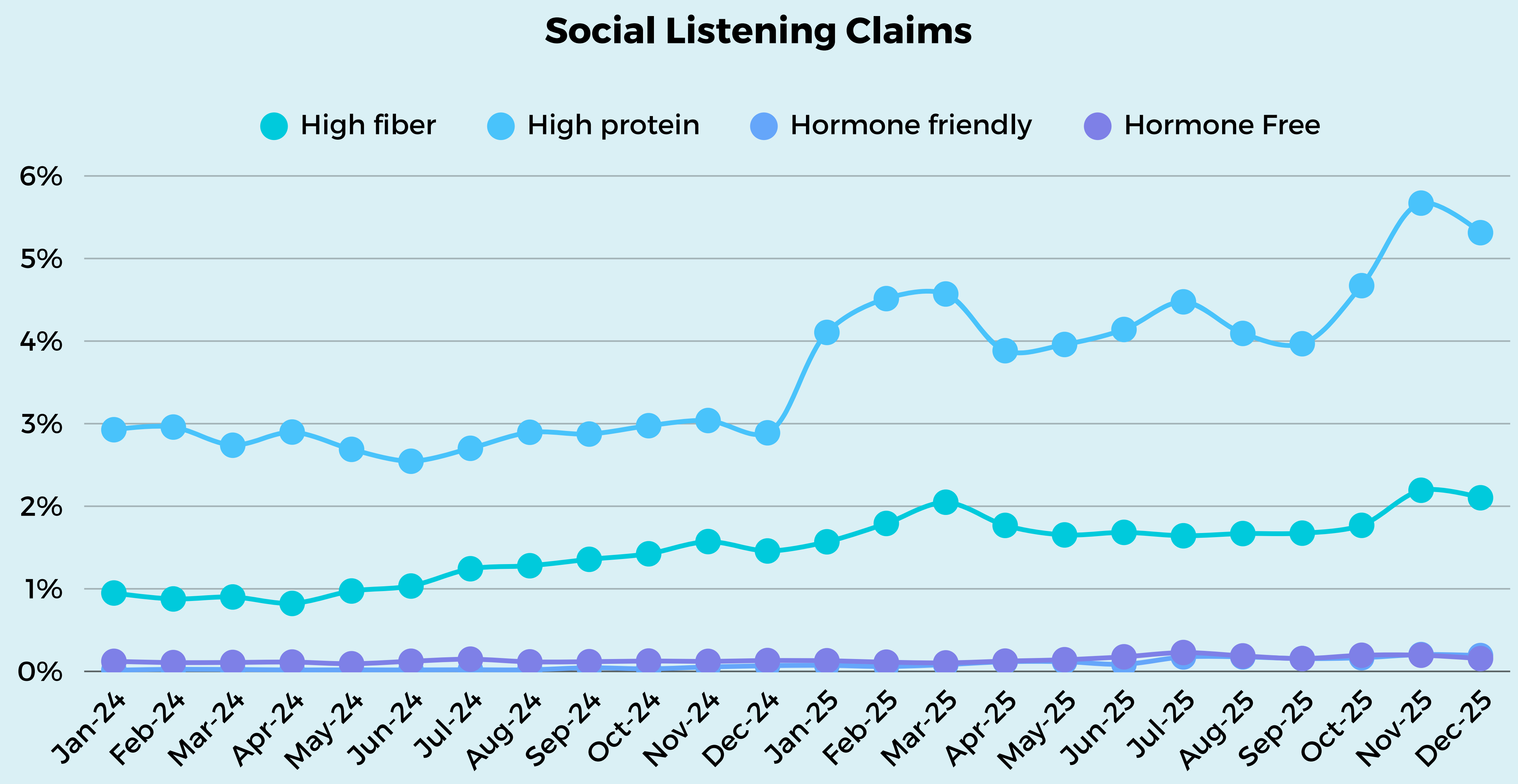
Functional Claims Highlight Benefits

Functional claims continue to gain traction in social listening data, with High Protein and High Fiber maintaining the largest share of voice while posting steady growth. At the same time, Hormone Friendly has surged rapidly from a small base, sharply outpacing the more established Hormone Free narrative.

Together, these trends point to consumers prioritizing outcome-oriented benefits over avoidance alone, with interest increasingly concentrated on claims that signal specific, personal health impacts rather than general wellness positioning



High Fiber +121.5% (2.1% SOV)

High Protein +81.5% (5.3% SOV)

Hormone Friendly +1172.0% (0.2% SOV)

Hormone Free +27.1% (0.2% SOV)

Jan 2024-Dec 2025 Growth Data Displayed; Dec 2025 SOV Displayed

Source: Brightfield Group; Wellness CPG Social Listening; January 2026

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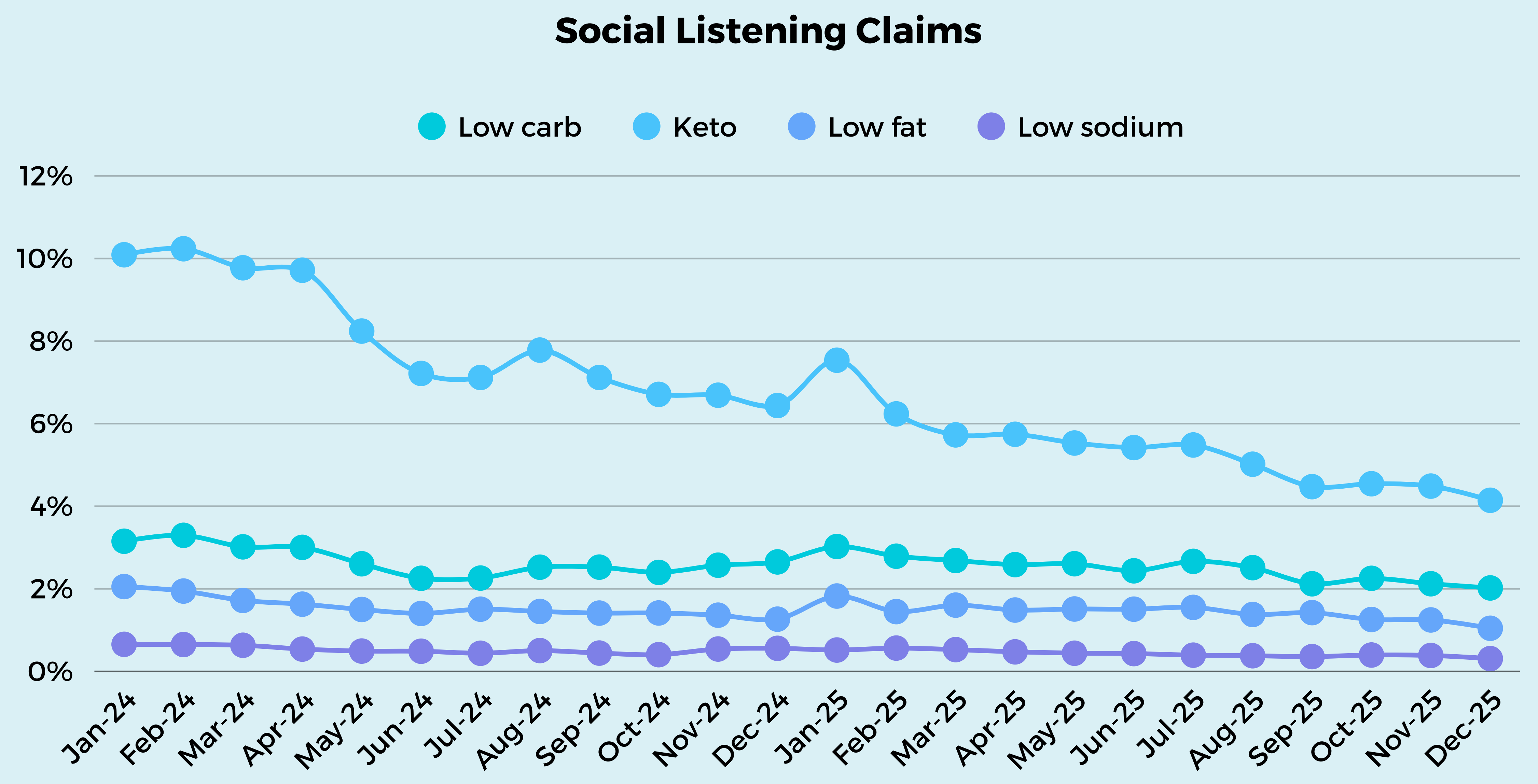
Claims that are on the Outs

Several once-dominant diet-driven claims are losing momentum, with Keto, Low Carb, Low Fat, and Low Sodium all seeing sustained declines in social conversation. While some retain meaningful share of voice, their trajectories signal fading relevance rather than cyclical fluctuation.

This pullback reflects consumer fatigue with restrictive, macro-focused frameworks, as attention shifts away from elimination-based dieting toward claims tied to quality, functionality, and trust. In this context, absence alone is no longer a compelling value signal.



Low Carb -35.9% (2.0% SOV)

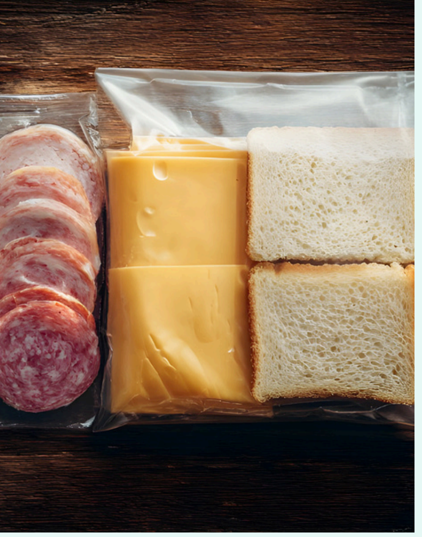
Keto -58.9% (4.1% SOV)

Low Fat -49.1% (1.0% SOV)

Low Sodium -52.8% (0.3% SOV)

Jan 2024-Dec 2025 Growth Data Displayed; Dec 2025 SOV Displayed

Source: Brightfield Group; Wellness CPG Social Listening; January 2026

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Consumers Want Functional Alternatives to Processed Foods

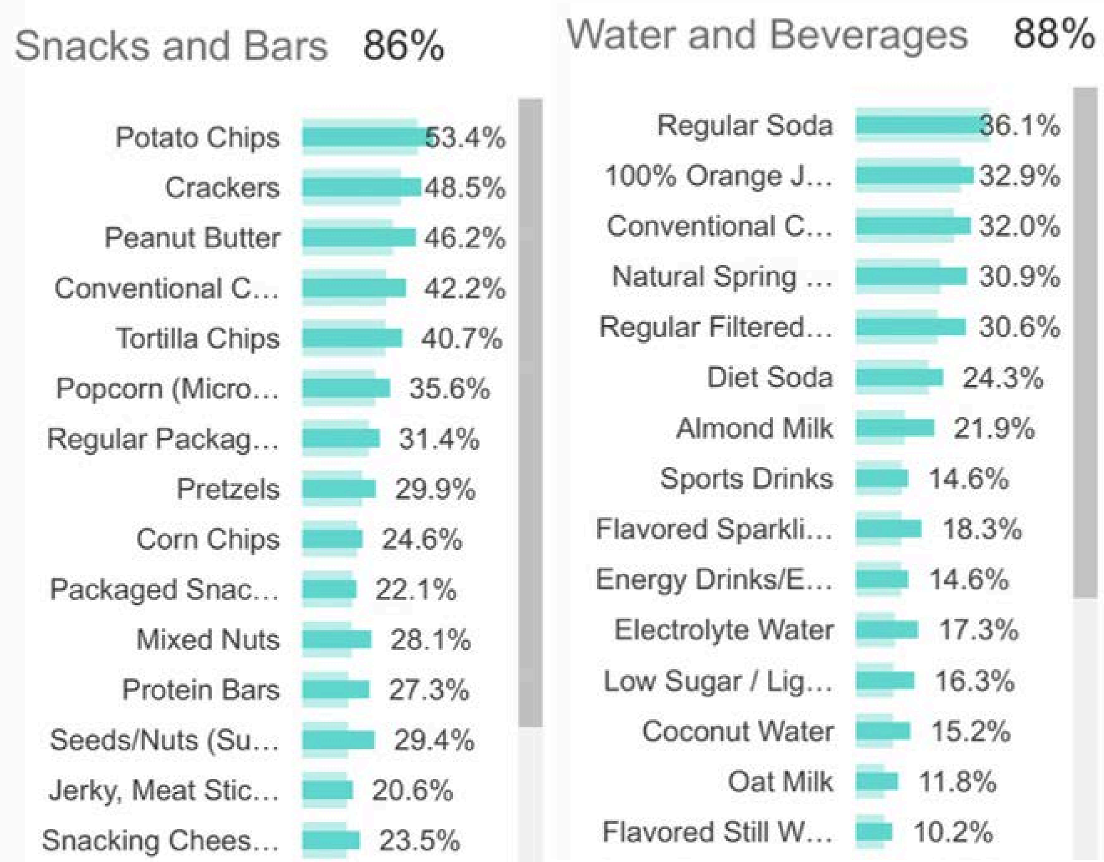
Looking at Q4 2025 data filtered by consumers who wanted "Non-Ultra Processed" products reveals an engaged consumer who over-indexes across most snacks, including healthy alternatives such as Mixed Nuts (28.1%), Protein Bars (27.3%) and Seeds/Nuts (29.4%). This trend also holds for beverages, especially for plant-based and more natural options.

While 27.2% have purchased functional foods (similar to the overall population), **nearly 40% haven't purchased but would be interested** - a sizable untapped market. This also highlights that, while these consumers want more out of their products, they aren't necessarily acting on these instincts while making purchasing decisions.

These consumers tend to have a higher perception of refrigerated snacks when it comes to quality and taste, but are less convinced on value and ease of access.

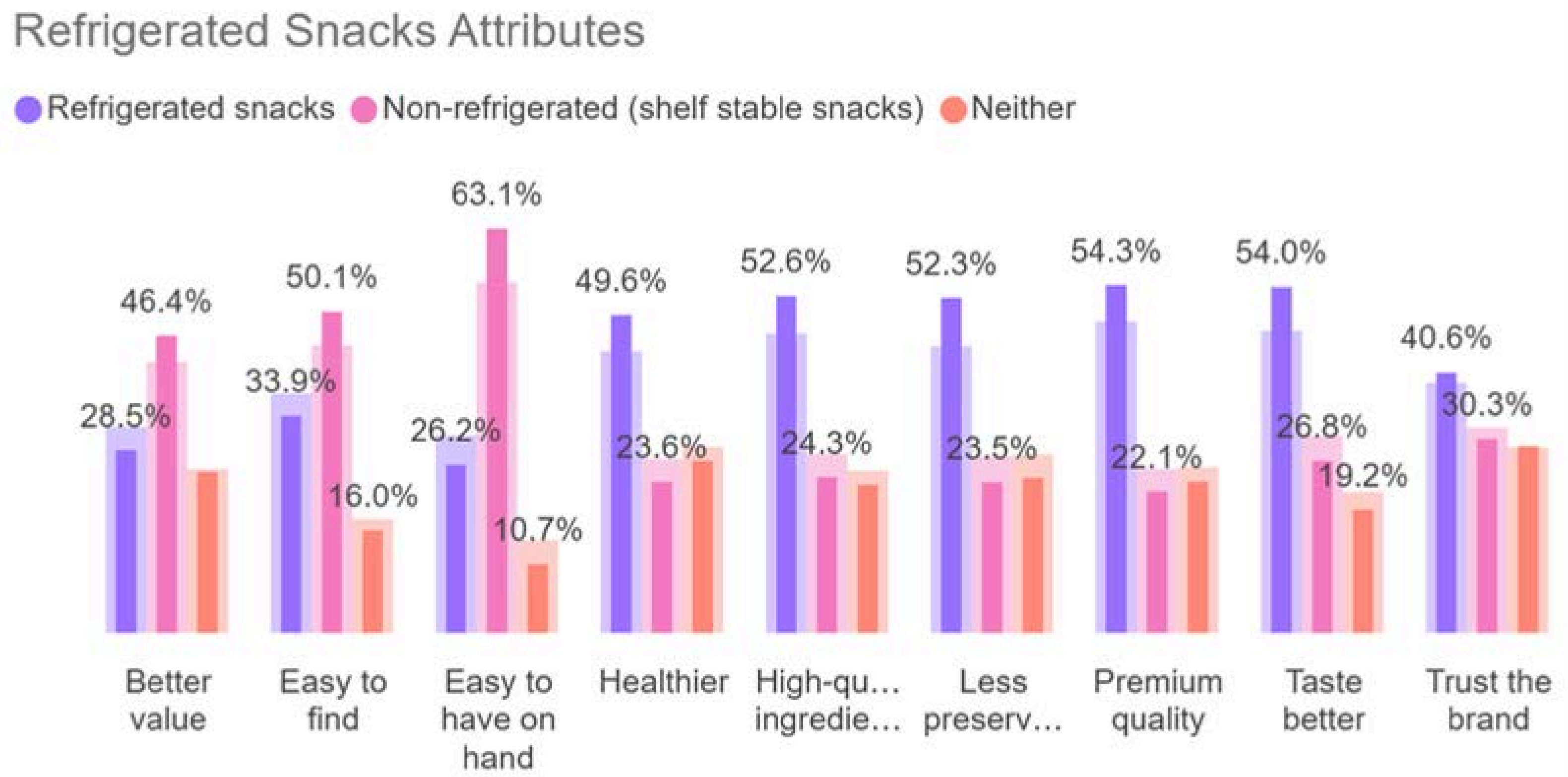
FROM THE PORTAL

Those who often avoid ultra-processed food (darker bar) versus total population (lighter bar)



27.2% Purchased Functional Foods
(26.6% overall)

39.6% Haven't but Are Interested
(35.4% overall)



FILTERABLE DATA HELPS YOU FIND THE TRENDS FAST IN BRIGHTFIELD'S WELLNESS CONSUMER INSIGHTS PORTAL

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Diet Soda: Social Growth Comes Alongside Ingredient Skepticism & Declining Usage

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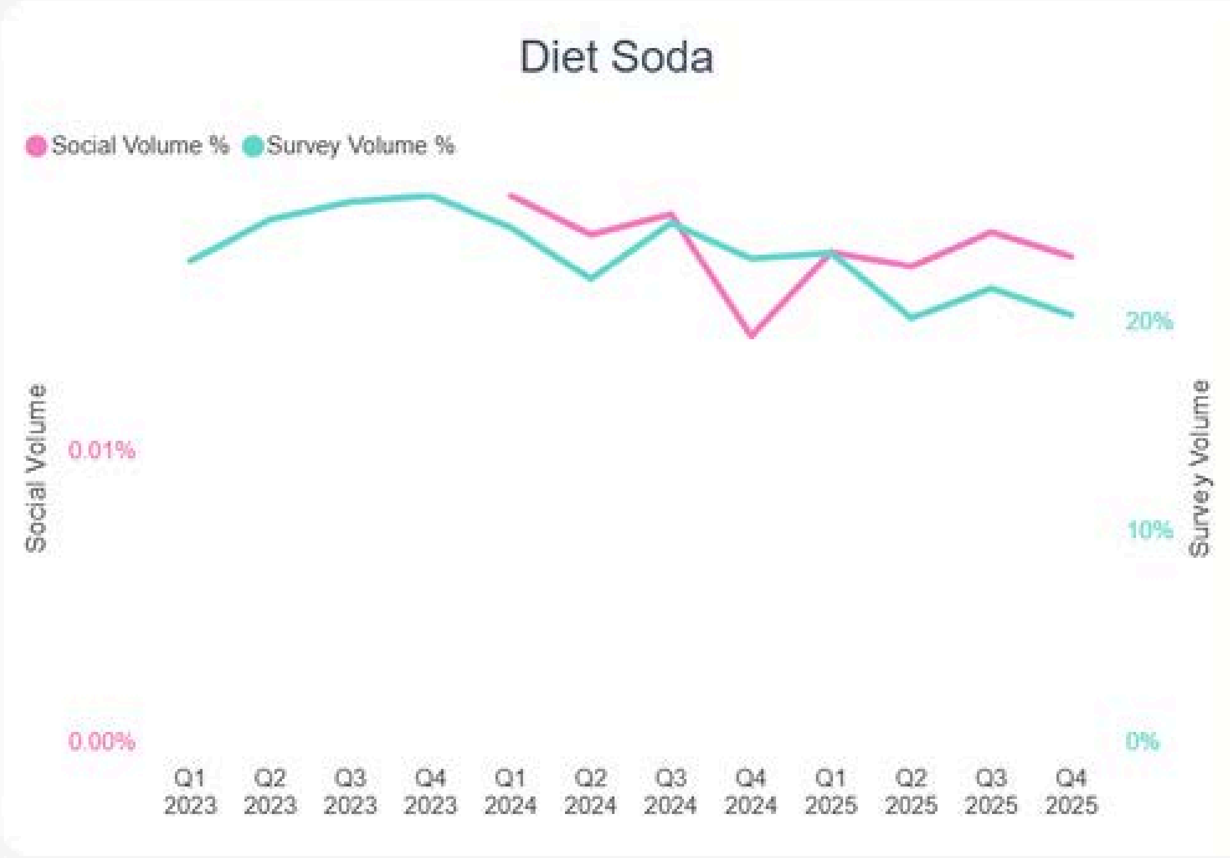
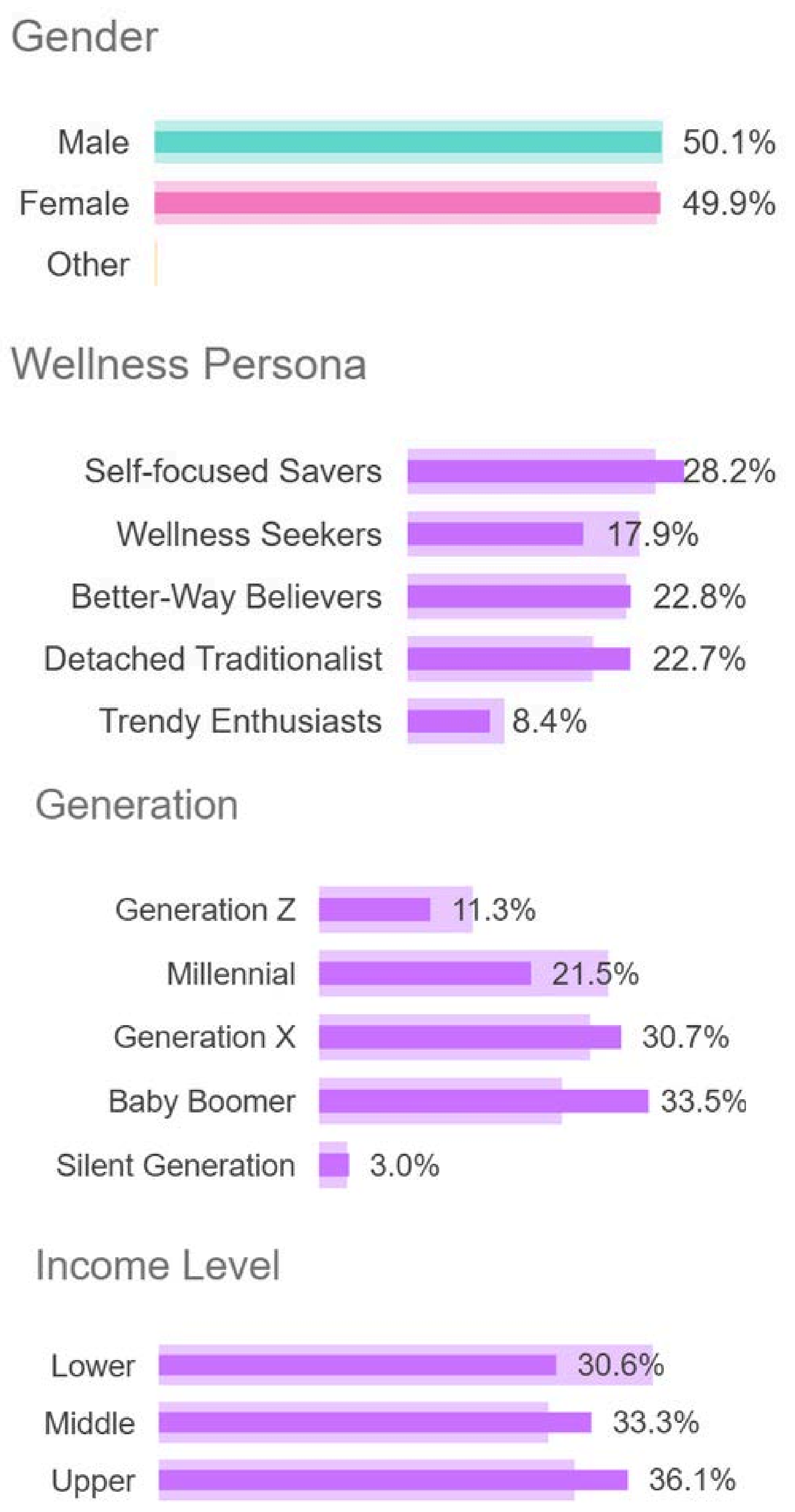


Trend Score	★★☆☆☆
Survey Incidence (Past Quarter)	20.3%
Purchase Survey (% Chg. Yago)	-11.8%
Social Share of Voice (Past Quarter)	0.02%
Social Share of Voice (% Chg. Yago)	19.7%

★ *Trend score driving factor: Social Growth Rate YoY is 19.7%*

Diet Soda Purchasers



While incidence of diet soda usage remains high at +20.3%, it has been shrinking in recent quarters, decreasing by +11.8% year-over-year. However, social volume has increased by nearly +20% - reflecting some ongoing excitement about the category but also ongoing concerns about potential negative health effects due to artificial ingredients.

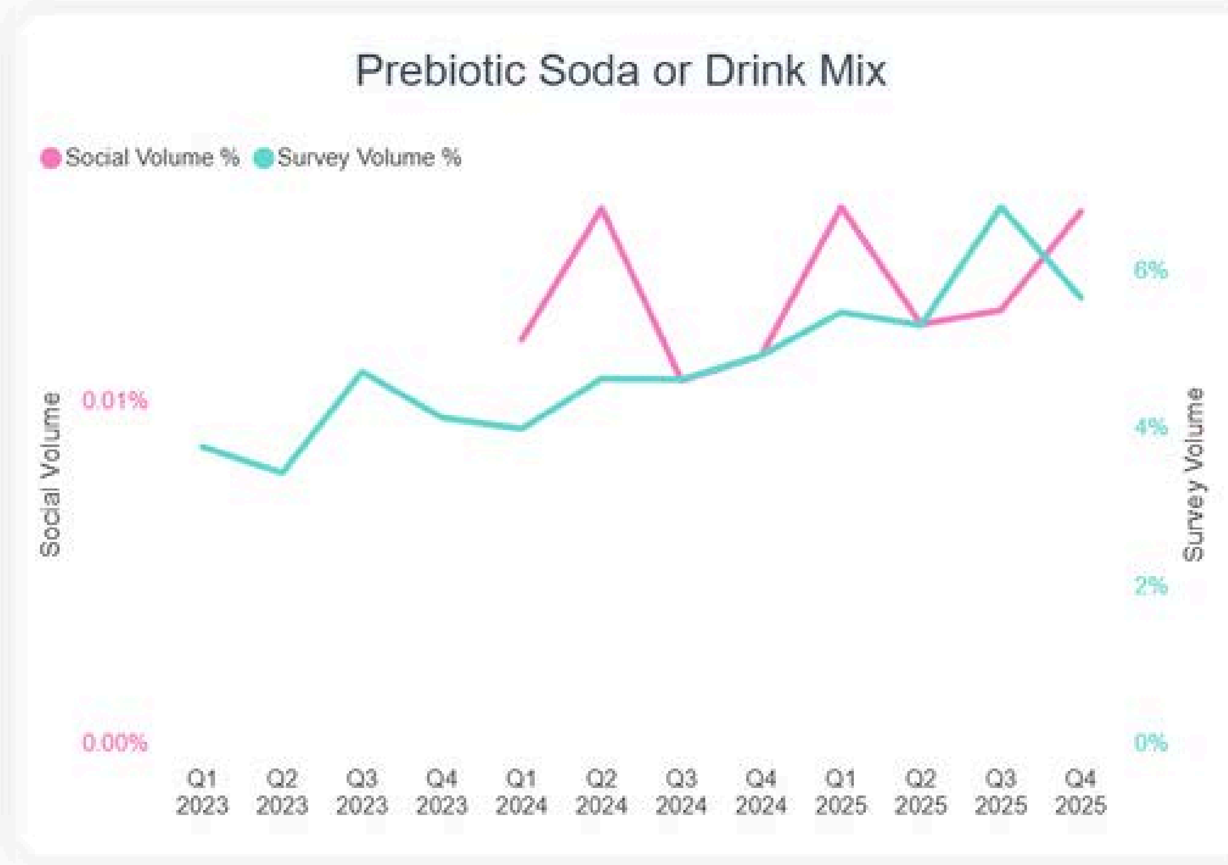
Diet Soda purchasers tend to skew older, over-indexing as both Gen X and Baby Boomer relative to the overall population sampled, and are more likely to be members of middle or upper income

A.I. Generated Summary of Recent Diet Soda Posts

Social media opinions on diet sodas highlight a mix of enthusiasm for their flavor variety and convenience, and concerns about health implications. Consumers express excitement over new flavors, like Diet Coke Lime and proposed 2026 releases from Mug Root Beer and Mountain Dew. However, some users warn about potential health risks linked to artificial sweeteners, including increased diabetes and liver disease risks, urging for careful consumption. Others integrate diet sodas into weight loss and fitness routines for their zero-calorie advantage, although they advise moderation. These discussions showcase a vibrant debate between taste pleasure and health considerations.

Prebiotic Soda: Interest in Functional Alternatives on the Rise

BRIGHTFIELD GROUP



Trend Score	★★★★
Survey Incidence (Past Quarter)	5.7%
Purchase Survey (% Chg. Yago)	14.9%
Social Share of Voice (Past Quarter)	0.01%
Social Share of Voice (% Chg. Yago)	37.2%

★ Trend score driving factor: Social Growth Rate YoY is 37.2%

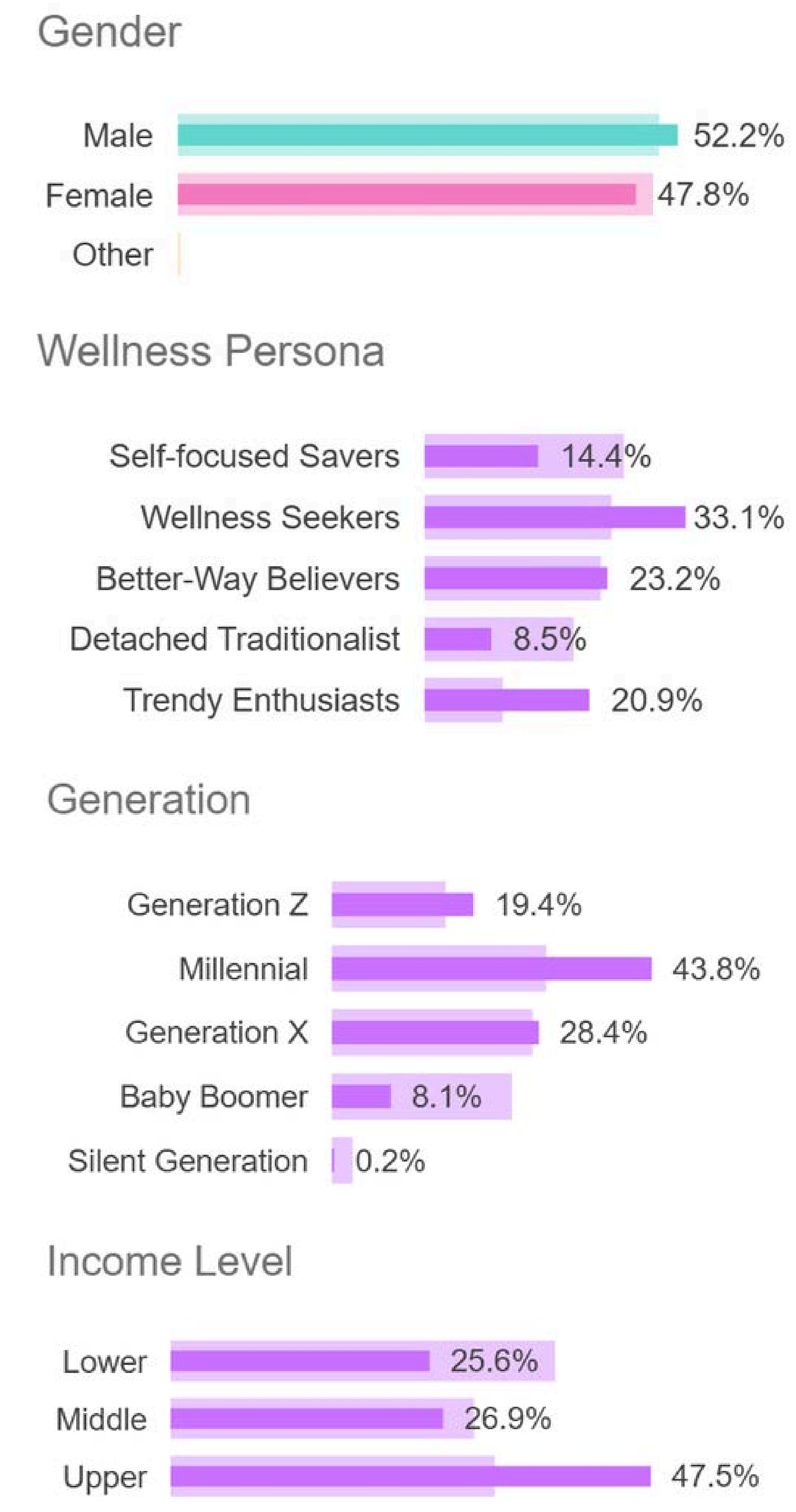
Prebiotic soda has seen solid growth in both consumer and social data, with double-digit year-over-year improvement in both metrics, culminating in an incidence of 5.7% in Q4 2025.

Category usage skews toward more educated consumers and upper income levels (47.5% fall in this income tier vs. 32.0% overall). Prebiotic soda consumers are more likely to be Wellness Seekers (health-focused fast followers) or Trendy Enthusiasts (Trendsetting Wellness Users) and over-index as Millennial.

A.I. Generated Summary of Recent Prebiotic Soda Posts

Social media users frequently discuss prebiotic sodas, highlighting diverse flavors like XOCH's Dandelion Verbena and Poppi's innovative blends, which are praised for their gut health benefits and low sugar content. Consumers appreciate the nostalgic yet functional twist these drinks offer, comparing them favorably to traditional sodas. Brands like Olipop and Caroline's Drinks emphasize probiotic components for digestion aid. Poppi's collaborations, such as with Love Island's Amaya Espinal, enhance appeal. Overall, there's a substantial trend toward health-conscious, functional carbonated drinks, creating opportunities for brand growth through flavor innovation and collaborations.

Prebiotic Soda Purchasers



Wheatgrass: Move Toward Natural, Plant-Based Ingredients Continues

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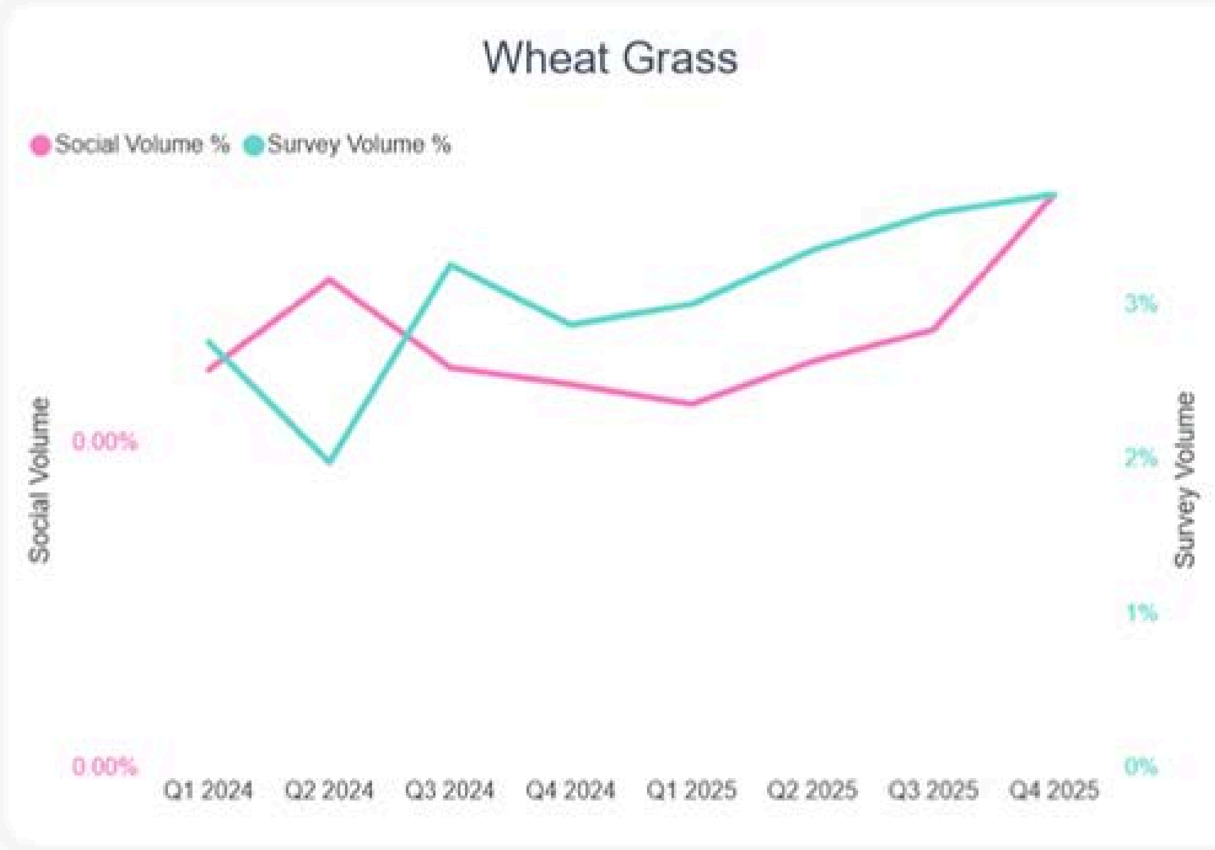
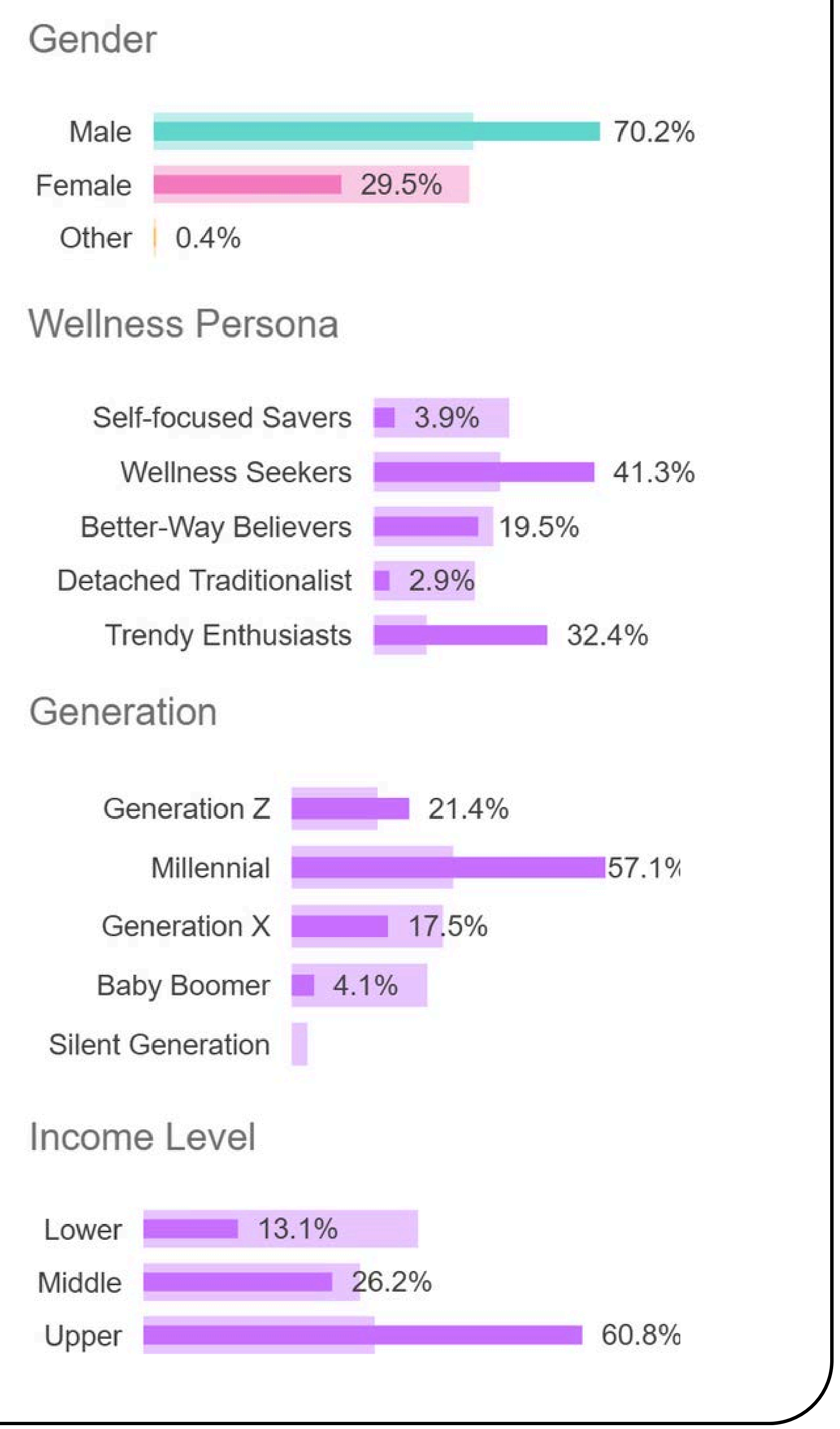


Trend Score	★★★★
Survey Incidence (Past Quarter)	3.7%
Purchase Survey (% Chg. Yago)	29.6%
Social Share of Voice (Past Quarter)	0.00%
Social Share of Voice (% Chg. Yago)	49.9%

★ Trend score driving factor: Percentage of users being Trendy Enthusiasts is 32.4%

Wheatgrass Purchasers



Wheatgrass is a strong niche ingredient, with growth of nearly +30% in consumer and +50% in social. In addition to fresh juice, this product can be found in powders and supplements with several purported benefits, including immunity-boosting and digestive aid.

Wheatgrass purchasers skew heavily male and tend to be more highly educated (59.3% with bachelor's degree or higher). Like prebiotic soda, these shoppers are also very likely to be Millennial and upper income,.

A.I. Generated Summary of Recent Wheatgrass Posts

Wheatgrass is widely celebrated for its health benefits across social media platforms. Users highlight its rich nutrient profile, containing essential vitamins, minerals, and antioxidants, which support immunity, digestion, and detoxification. It is popular in smoothies, juices, and powders, appealing to those interested in plant-based diets and natural detox remedies. While widely endorsed for energy and skin benefits, a few users express concerns about potential contaminants, urging transparency in sourcing. Overall, wheatgrass is positioned as a versatile superfood bolstering wellness routines.

Protein Cereal: Growth Signals Rise in Interest in Functional Snacking

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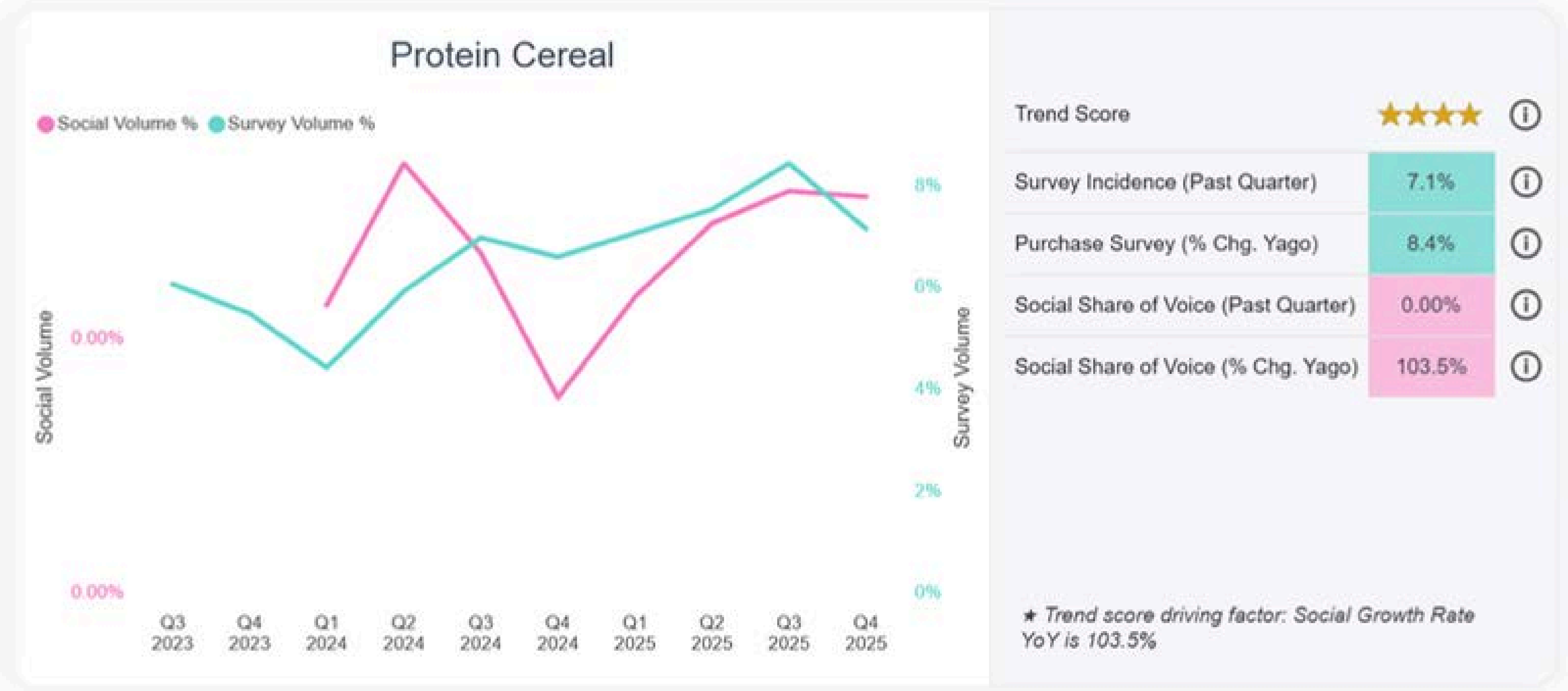


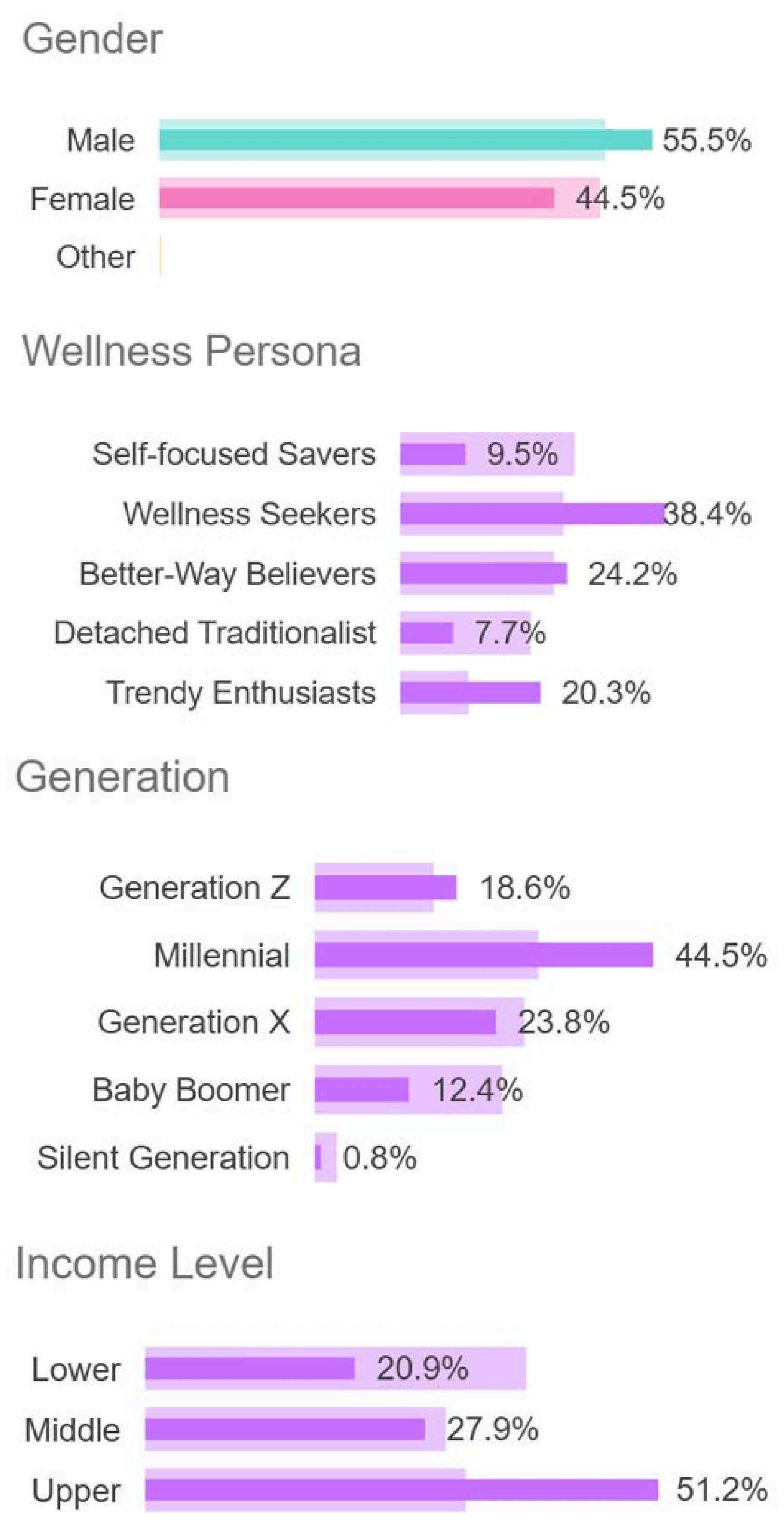
Protein Cereal fits neatly into the trend of moving towards more wholesome and nutritious alternative products, and has seen growth across both metrics - including explosive social growth of 103.5% and a consumer survey incidence of 7.1% in Q4 2025.

Category purchasers skew slightly male but see a strong over-indexing with Wellness Seekers and Trendy Enthusiasts - a sign that these products are gaining traction with more engaged consumers. As seen in many other categories, shoppers also skew Millennial and upper income.

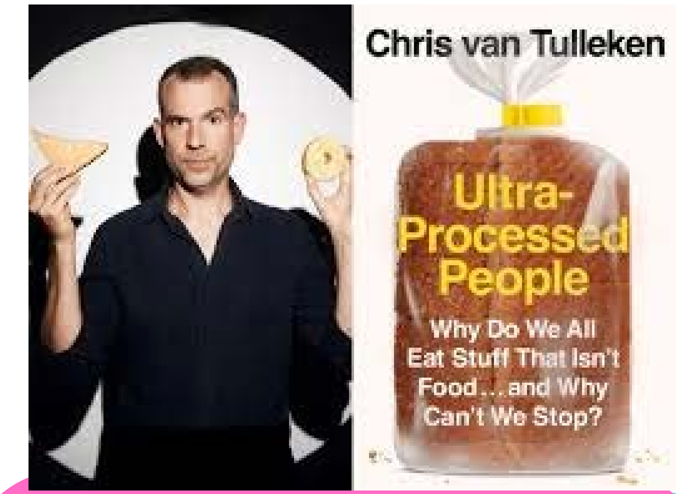
A.I. Generated Summary of Recent Protein Cereal Posts

Social media buzz around protein cereal highlights its growing popularity among fitness enthusiasts and health-conscious individuals, emphasizing its high protein content as a nutritious, guilt-free breakfast or snack option. Many users enjoy the nostalgic flavor reinvented with added protein, while also trying creative recipes that incorporate it with yogurt or pancakes. Brands like Magic Spoon and Catalina Crunch are frequently mentioned for their flavor variety and health benefits. Besides dedicated fitness users, dieters appreciate the protein boost without a caloric excess, underscoring protein cereal's dual appeal for taste and health goals.

Protein Cereal Purchasers



Celebrities and Influencers are shaping the Conversation with Ultra Processed Foods



Dr. Chris van Tulleken
British physician and author of Ultra-Processed People, Dr. van Tulleken has been vocal about the health risks associated with UPFs. He emphasizes that reducing UPF consumption can significantly lower the risk of various diseases.

"MAHA Moms" is a growing grassroots movement of mothers advocating for a healthier America under the banner of MAHA—Make America Healthy Again. This initiative gained momentum in 2024, particularly through the efforts of Robert F. Kennedy Jr.

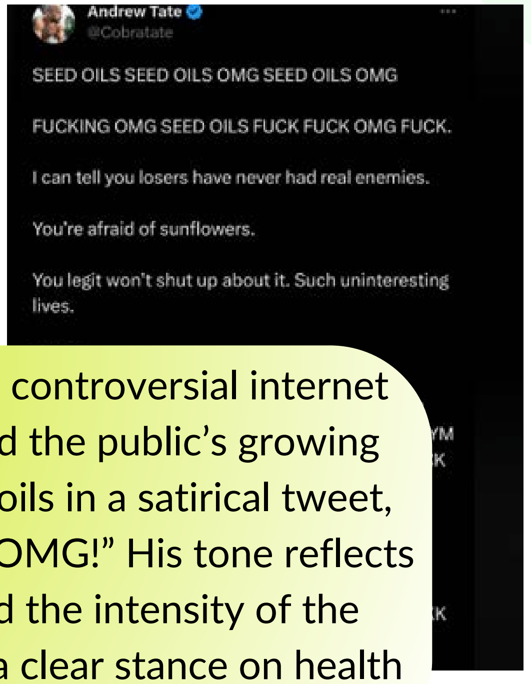
Jamie Oliver
Celebrity chef Jamie Oliver has long campaigned for healthier school meals and food education. He continues to address issues related to UPFs and their impact on public health.

Dr. Megan Rossi (The Gut Health Doctor)
A registered dietitian and gut health expert, Dr. Rossi emphasizes the importance of plant diversity and cautions against over-reliance on ultra-processed plant-based products.

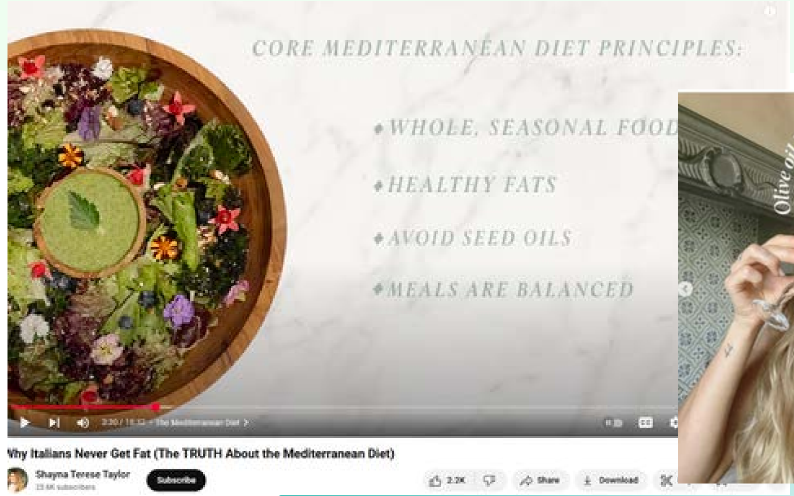
Vani Hari ("The Food Babe") is **a** well-known food activist and author, Vani Hari has built a significant following by campaigning against harmful food additives.

🌾 **Jennifer Garner**
Actress & co-founder of Once Upon a Farm, Garner advocates for whole, minimally processed foods — especially for kids. She avoids stocking processed foods at home and has made organic baby food more accessible through WIC and rural outreach.

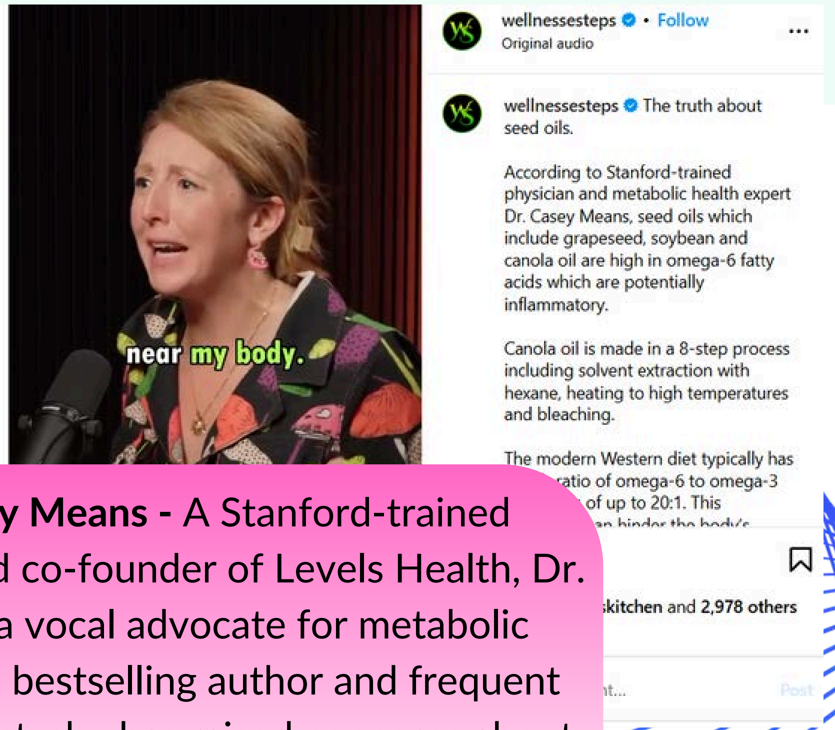
Celebrities and Influencers are helping shape the Conversation with Seed Oils and Alternatives



Andrew Tate - The controversial internet personality mocked the public's growing concern over seed oils in a satirical tweet, writing "SEED OILS OMG!" His tone reflects skepticism toward the intensity of the debate rather than a clear stance on health claims.



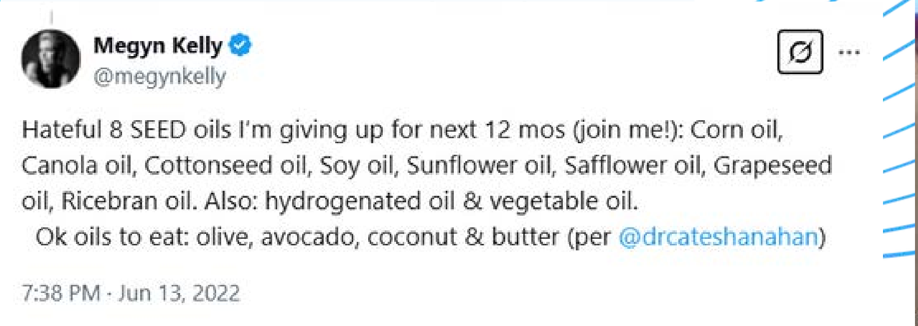
Shayna Terese Taylor – The wellness entrepreneur, chef, and model is known for her focus on clean living and whole-food nutrition. She often shares Mediterranean-style recipes using olive oil and other minimally processed ingredients.



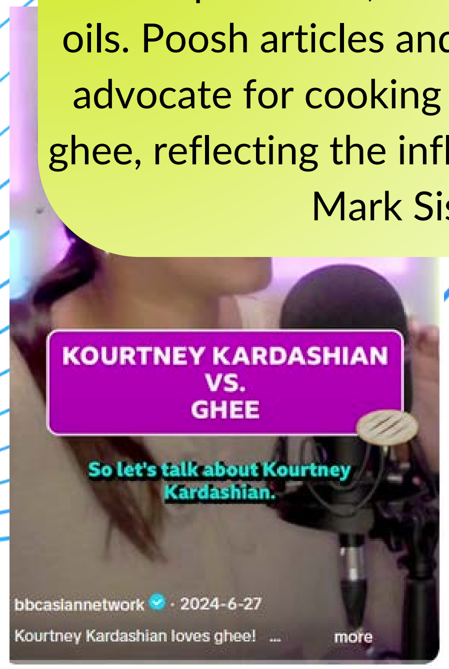
Dr. Casey Means - A Stanford-trained physician and co-founder of Levels Health, Dr. Means is a vocal advocate for metabolic health. As a bestselling author and frequent podcast guest, she has raised concerns about the role of seed oils in chronic inflammation and disease.

Jessica Biel: The actress has promoted a health-conscious lifestyle, often cooking with olive oil and avoiding overly processed ingredients. Her wellness brand, Kinderfarms, notably excludes seed oils, reinforcing her family-first, clean-label values.

Megyn Kelly: The celebrity news host publicly committed to avoiding seed oils for a full year in an effort to improve her health. Her posts helped fuel the #hateful8 conversation online, referencing



Kourtney Kardashian: Through her Poosh platform, Kardashian has embraced trends like the paleo diet, which often shuns seed oils. Poosh articles and her personal posts advocate for cooking with coconut oil or ghee, reflecting the influence of figures like Mark Sisson.



Joe Rogan - The popular podcaster has expressed skepticism about seed oils, notably calling cooking with grapeseed oil a "crime against nature" on his show. His platform has helped mainstream the debate, often hosting guests like Saladino who reinforce this stance.

Brightfield Group; Wellness CPG Social Listening; August 2024

Who are the Wellness Segments?

Not all consumers approach wellness the same way. Brightfield's segmentation shows which groups are most open to these trends — and where protein might stick first.

Brightfield's Wellness Segments were created based on health behaviors and attitudes gathered in our quarterly survey of U.S. Adult general population consumers through statistical analysis modeling. We found Five distinct segments of consumers that all behave differently in the Health and Wellness market. Those 5 segments can be considered on a continuum where you can explore where new trends and products align from least to most receptive to new products and trends.

Least Trendy **Most Trendy**

Stay ahead of all the wellness trends!

The data is yours to explore with Brightfield Consumer Insights & Social Listening

Explore Consumer Insights

Explore Social Listening

Questions?

Get in Touch!

BRIGHTFIELD GROUP