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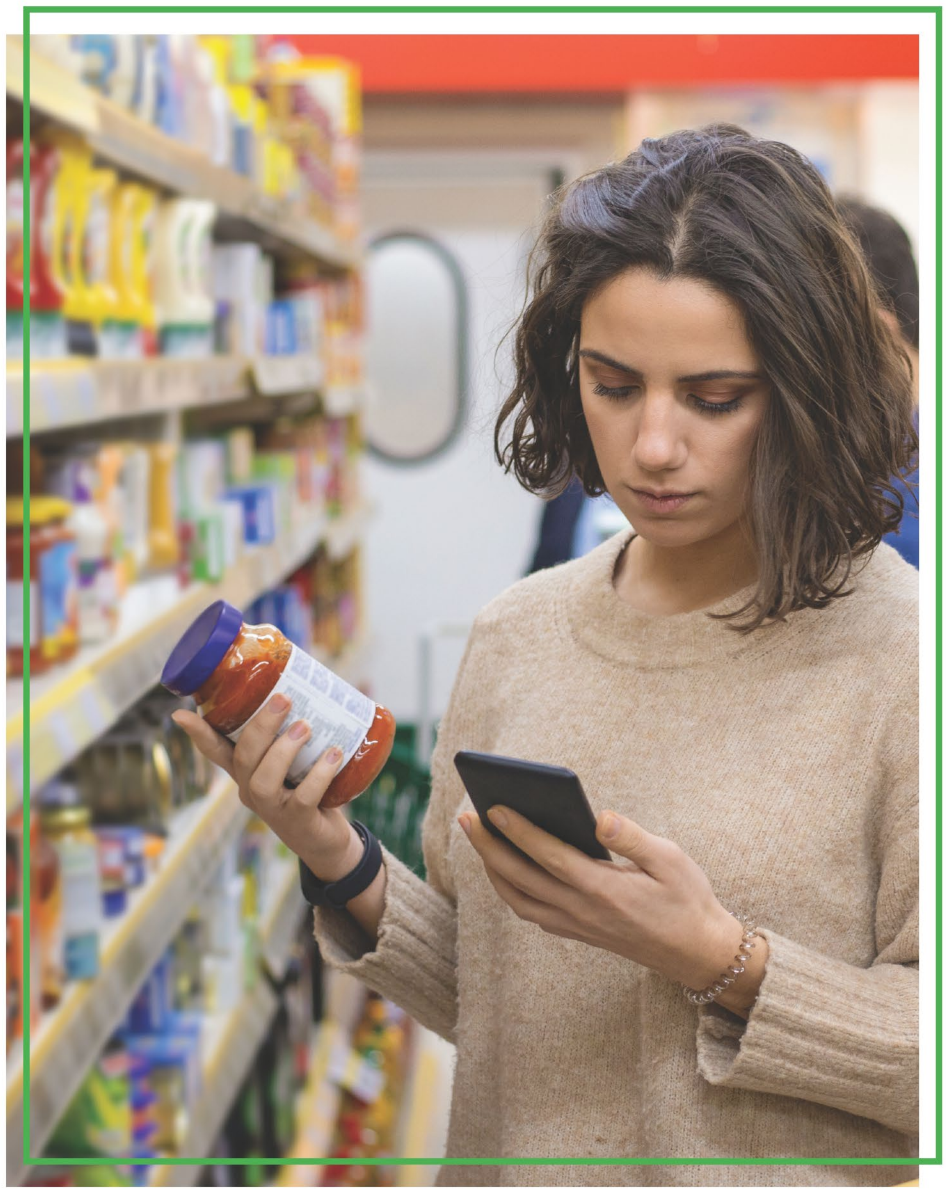
FMI THE FOOD INDUSTRY ASSOCIATION

HEALTHY ACCORDING TO ME

A LOOK INTO SHOPPER PERCEPTIONS OF HEALTHY AND IN-STORE REALITIES OF PRODUCT SALES



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A LOOK INTO SHOPPER PERCEPTIONS OF HEALTHY AND IN-STORE REALITIES OF PRODUCT SALES

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About FMI

As the food Industry association, FMI works with and on behalf of the entire industry to advance a safer, healthier and more efficient consumer food supply chain. FMI brings together a wide range of members across the value chain — from retailers that sell to consumers, to producers that supply food and other products, as well as the wide variety of companies providing critical services — to amplify the collective work of the industry. **www.fmi.org**.

About SPINS

SPINS is the leading provider of data, analytics, and industry-defining insights for the CPG and retail ecosystem, with a specialty in health, wellness, and emerging trends. Powered by proprietary product intelligence, advanced analytics, and a deep understanding of shopper behavior, SPINS helps brands, retailers, and their partners uncover opportunities, connect with consumers, and accelerate sustainable growth. **www.spins.com.**

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Executive Summary

Key Takeaways on Modern Shopper Perspectives on Health and Wellness

Today's shoppers define health in deeply personal, varied ways—there is no universal definition. However, when asked to simplify their views, consistent themes emerge that reflect how healthy living is practiced in everyday life. These themes indicate a broader shift from rigid nutritional rules to a more holistic, intentional, and values-driven approach to food and wellness.

Health is Multifaceted and Personal

Shoppers' definitions of "healthy" are nuanced and vary widely. Health is seen not just through the lens of nutrients, but also taste, food quality, how meals are prepared, and the care and intention behind eating choices. The concept of "eating well" is viewed as a balance of nutrition, enjoyment, and mindfulness—more of a lifestyle practice than a checklist.

Transparency and Trust are Essential

In a crowded marketplace, shoppers rely heavily on labels, certifications, and on-pack claims to gauge whether a product aligns with their health goals, dietary needs, and personal values. Certifications related to sustainability, animal welfare, and social responsibility are especially powerful, serving as signals of brand credibility and trust.

Intentional Eating is on the Rise

Shoppers are becoming more purposeful in their food choices, gravitating toward specific ingredients that deliver clear benefits. Protein is sought for energy and satiety, fiber for digestive and heart health, and reduced added sugar for weight and disease management. The increasing scrutiny of sugar highlights a growing desire to avoid what's perceived as negative, alongside a pursuit of functional, nutrient-dense foods.

Sustainability is Integral to Health

Wellness is no longer defined solely by personal physical health. Shoppers now see sustainability as a key component of healthy living—connecting environmental impact, ethical sourcing, and community wellbeing to their food choices. "Healthy for me" is increasingly tied to "healthy for the planet."

Shoppers Want Education, Not Just Marketing

Shoppers are seeking more than appealing branding—they want to understand what's in their food and why it matters. This demand for education over persuasion reflects a shift toward informed decision-making, where shoppers prioritize ingredients and claims that resonate with their evolving health priorities.

Functional Benefits Drive Choice

Shoppers increasingly seek immediate, tangible health outcomes. Weight management, mood support, and sustained energy are top wellness priorities. These goals reflect the realities of busy lives and reinforce demand for foods that deliver both convenience and functional benefits without relying on quick-fix solutions.

Eating Decisions are Contextual and Flexible

While most shoppers report a long-term commitment to healthy eating, actual choices are influenced by factors like time of day, generation, and eating occasion. Effort, motivation, and available options all vary, and shoppers apply their personal definitions of health differently depending on the context. Price, convenience, and availability often shape final purchase decisions more than intention alone.

Behavior Reflects a "Seek and Avoid" Mentality

Shoppers evaluate health by both the presence of beneficial ingredients (protein, fiber, whole foods) and the absence of perceived negatives (added sugar, artificial additives). These preferences vary by demographic, life stage, and household makeup, leading to highly individualized purchase behaviors across food categories.

1 | What is “Healthy”

Key topics include:

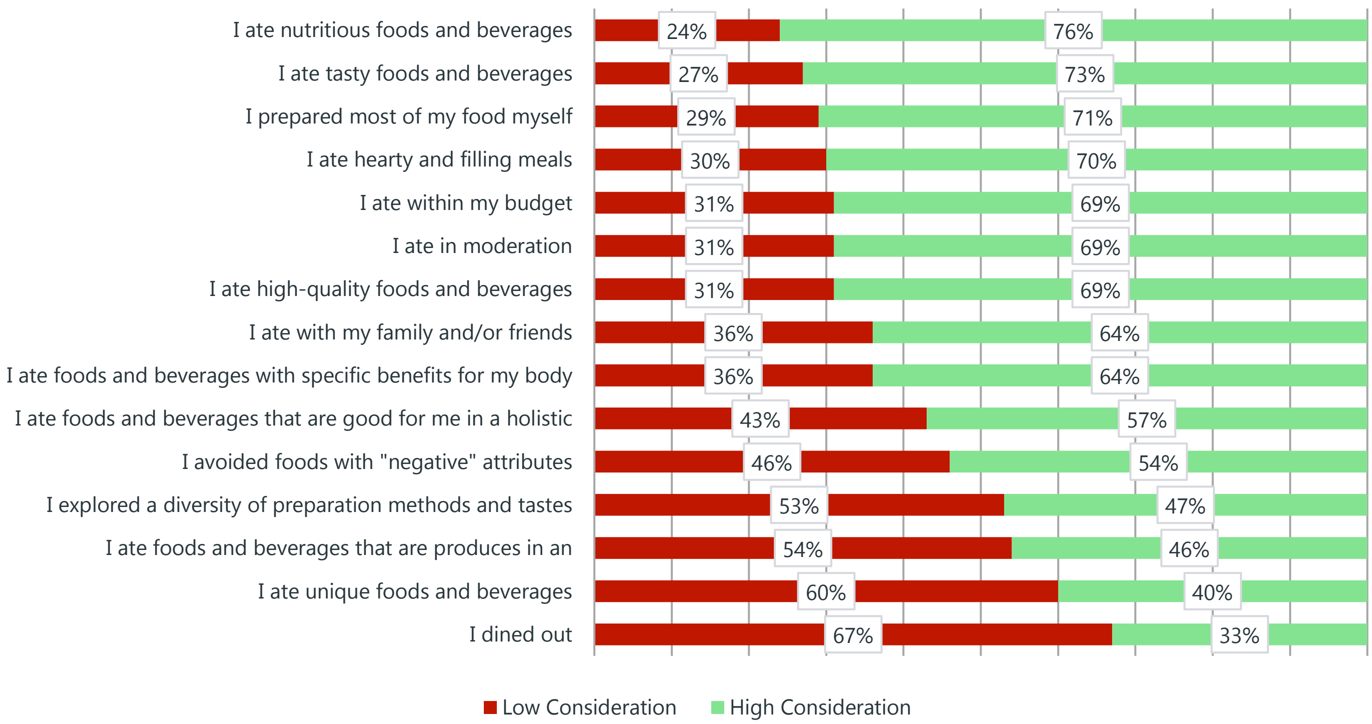
- Shoppers Define “Healthy”
- Food Choices for Health
- Sustainability’s Role

Shoppers Define "Healthy"

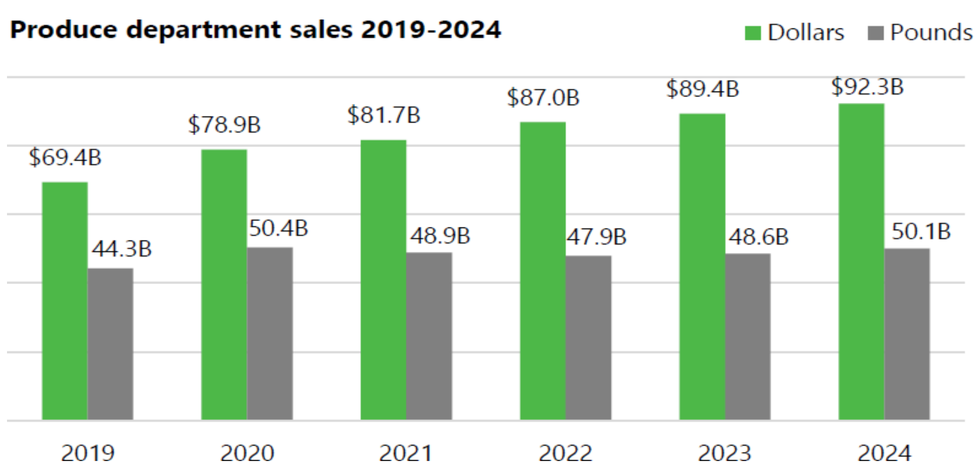
Health doesn't come with a one-size-fits-all definition. Ask ten shoppers what "healthy" means and you'll get ten different answers. But when pressed to sum it up in a single word, clear themes began to rise to the surface, revealing the most common ways people frame health in their everyday lives:[1]

Which factors shape shoppers' sense of success in their eating habits?

Success is defined by a blend of interconnected factors. It's not just about nutrients but also taste, quality, and care that went into their meals. Feeling good about food comes from striking a balance; choosing nourishing ingredients, enjoying satisfying portions without overindulging, and often preparing meals at home to maintain control and intention. In this way, "eating well" is less a single action and more a holistic practice that blends nutrition, enjoyment, and mindfulness.[1]



- **Shoppers define healthy eating through nutrient-rich foods with whole-body benefits.** Fruits and vegetables continue to earn the "health halo"—with 72% of shoppers immediately linking them to healthy eating, they remain the most powerful symbol of wellness on the plate.[1]
- Fresh fruit and vegetable sales reached a record high of $92.3B in 2024. Importantly, pound sales rose above 2023, 2022 and 2021 levels to an impressive 50.1 billion pounds.[2]



FMI: The Power of Produce 2025 Report

Protein (57%) and avoiding added sugars (53%) are now among the top three healthy connotations.

Shopper Insight

"Healthy eating is smaller portions, fresh foods, and preparing meals yourself. We try to have some kind of fresh food, at all times with every meal. High protein options also tend to fill you up with lesser quantities. Smaller portion, smaller plate... fresh foods, not processed."

– Male, OH, 5 Person HH

- High protein across Grocery, Frozen & Refrigerated departments over the past year, with items containing 20+ grams of protein gaining 4% in units vs. items with <20g of protein losing 4% in units during that same time.[3]
- Three areas of high protein that are of particular interest experiencing extremely high unit

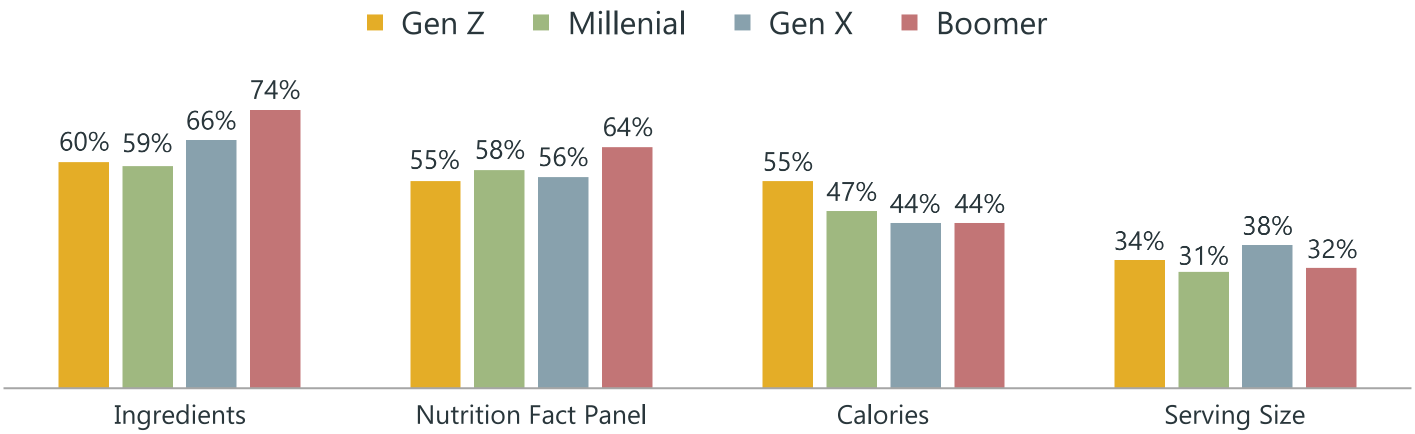
  growth include yogurt (+33%), bread (+38%) and hot cereal (+104%).[3]

Labels are still being used as a health compass in store.

Shoppers aren't just scanning shelves for what tastes good or fits their budget. They rely on factual information provided in the required Nutrition Facts Panel and ingredient lists, as well as voluntary certifications and claims to quickly gauge which products align with their wellness goals, dietary restrictions, personal values, and many more factors. This makes transparency more influential than ever. This growing desire to understand what's inside a product reflects a deeper trend: shoppers want education, not just marketing. They are actively looking for credible signals that reinforce their health goals and ethical priorities, and labels remain one of the most immediate and influential tools in the shopping journey.

- Ingredients (67%) and Nutrition Facts Panels (59%) are the top sources shaping perceptions of what's "healthy," with calories trailing as a third source of wellness.[1] What's especially striking is how label claims resonate differently across audiences: Millennials and households with children are far more likely to be swayed by attribute-based claims, signaling that the next generation of shoppers is looking beyond the basics and demanding alignment with their values right on the package.

Top Product Label Portions Of Importance[1]



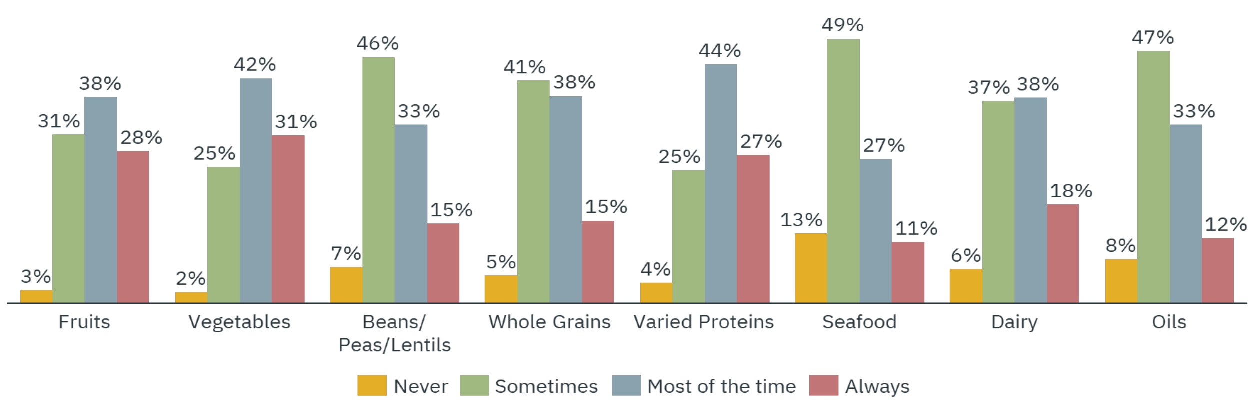
Food Choices for Health

Shoppers are focusing on specific food groups and nutrients with clear benefits. Protein is valued for satiety and energy, fiber for digestive and long-term health, and reduced added sugar as a key marker of wellness. These shifts show shoppers are becoming more intentional, driving demand for transparency, nutrient density, and functional foods.

Which factors shape shoppers' sense of success in their eating habits?

Success is defined by a blend of interconnected factors. It's not just about nutrients but also taste, quality, and care that went into their meals. Feeling good about food comes from striking a balance, choosing nourishing ingredients, enjoying satisfying portions without overindulging, and often preparing meals at home to maintain control and intention. In this way, eating well is less a single action and more a holistic practice that blends nutrition, enjoyment, and mindfulness.

Which categories are shoppers including for health benefits?



Protein as a health driver.

Top 10 Growing Categories For Protein Nutrition Facts Panel Ranges 15G+1 *(Based On Abs Unit Growth)*	
1	Yogurt
2	Snack Bars
3	Chips & Pretzels & Snacks
4	RF Juices
5	Dairy & PB Dairy Alts Other
6	Hot Cereals
7	SS Tea & Coffee RTD
8	SS Meat Poultry & Seafood
9	Bread and Baked Goods
10	Cold Cereals

- When shoppers look to boost their protein intake, they turn first to familiar, seeking whole-food sources including eggs (52%), meat/poultry/seafood as a meal component (34%), meat that requires cooking (26%), plant-based staples like nuts/seeds (25%) and beans/lentils (23%) to meet their protein needs.[1]

- However, Gen Z places protein bars among their top three go-to sources; while both Gen Z & Millennials over-index on protein shakes and beef jerky- highlighting a generational shift toward portable, convenient protein solutions.[1]

Note the following abbreviations, used above: “NFP”= “Nutrition Facts Panel”; “RF” = “Refrigerated”; “PB” =”Plant-based”; “SS”=”Shelf-stable”; RTD=”Ready-to-drink”

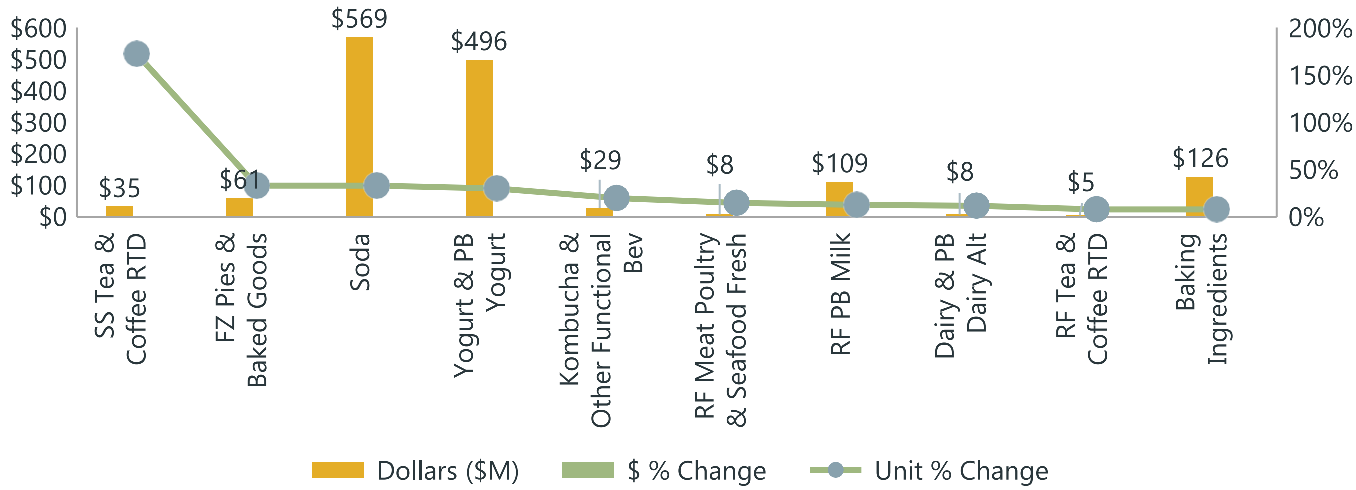
Different paths to fiber

Fiber has long been viewed as a nutrient ready for broader adoption, and recent data shows that momentum is building. Shoppers are no longer passively encountering fiber; they are actively seeking fiber-rich foods for benefits like digestive health, disease prevention, and overall wellness. This shift signals a more intentional approach to nutrition and positions fiber as a central marker of healthier eating.

- When considering which products shoppers turn to for increasing fiber intake, fresh vegetables (44%) and fruits (41%) ranked on top as trusted natural sources. Following were beans (26%), oatmeal (25%), and nuts/seeds(23%), recognized as additional raw sources of fiber.[1]
  - Generational differences add nuance to fiber choices. Gen Z gravitates toward brown rice and peanut butter as part of their top picks, reflecting a more modern, versatile approach. In contrast, Gen X and Boomers are more likely to choose whole grain breads and pastas, favoring familiar, grain-based staples as their go-to sources.

- Fiber availability continues to proliferate as we see innovative product development to add fiber into products like ready-to-drink (RTD) tea and coffee and soda, fueling fiber as a new benefit in daily consumption options with on-the-go convenience.

Fastest Growing Fiber Categories[3]



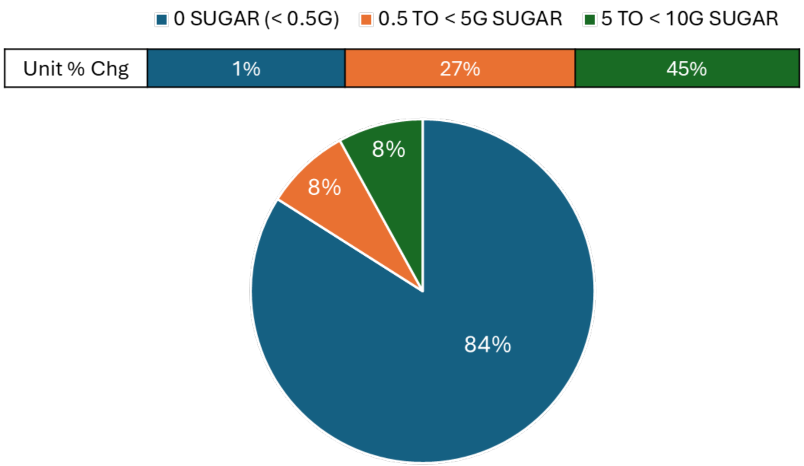
Note the following abbreviations, used above: "RF" = "Refrigerated"; "PB" ="Plant-based"; "SS"="Shelf-stable"; RTD="Ready-to-drink"; "FZ"="Frozen"

Cutting back on added sugar

Sugar has become one of the most scrutinized elements of the modern diet, with shoppers increasingly viewing it as a barrier to health. Concerns about weight, metabolic health, and long-term disease risk are driving shoppers to scan labels and choose low- or no-sugar options. Reducing added sugar is now seen as a practical step toward wellness, placing it alongside protein, fiber, and nutrient-rich foods as a top priority shaping today's food choices.

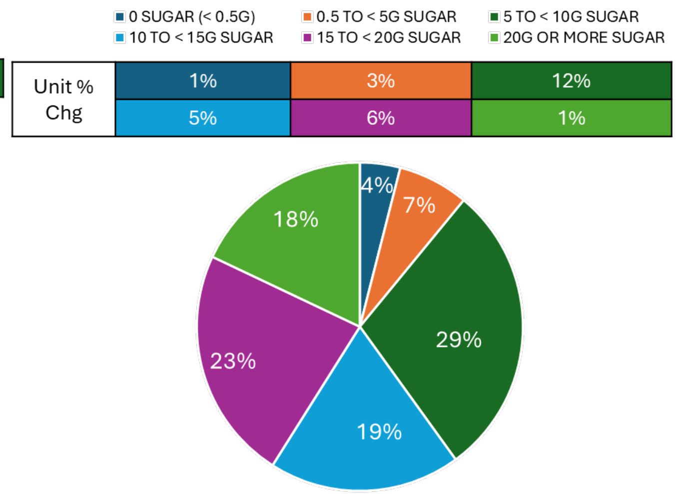
- As shoppers seek to reduce their added sugar intake, many are expressing intent to purchase swaps such as fresh fruit (69%), yogurts (41%) and cereals (33%) with no added sugars, sparkling or zero-calorie waters with natural flavors (30%), and diet beverages (25%).
  - Generational differences also emerge with Gen Z showing a stronger preference for yogurts with artificial sweeteners, ranking them higher than no-added sugar options.[1]
- Interestingly, as we look to understand what no added sugars really mean, a product that says "no added sugar" means no extra sugar—like table sugar, syrups, or honey—was put in during processing. These products may still have natural sugars from fruit, milk, or other ingredients, but nothing extra was added.
- Shoppers are increasingly gravitating toward natural sweeteners across the store. Ingredients including monk fruit, agave nectar, and date sugar are driving strong growth (40%+) across Grocery, Refrigerated, and Frozen departments. Granola and Snack Bars highlight this shift with products containing artificial sweeteners declined 31%, while those formulated with natural sweeteners grew 32%. This pattern extends beyond snacks into other aisles, including Shelf Stable Juice Drinks. Items containing aspartame declined 22%, compared to a 39% increase for options sweetened with monk fruit.

Diet Soda Sales % Contribution[3]



	0 SUGAR (< 0.5G)	0.5 TO < 5G SUGAR	5 TO < 10G SUGAR
Unit % Chg	1%	27%	45%

Yogurt Sales % Contribution[3]



Unit % Chg	1%	3%	12%
	5%	6%	1%

Sustainability's Role

Sustainability has become an important aspect for which shoppers evaluate products in-store, influencing everything from packaging to sourcing and ingredient transparency. This shift reflects a broader mindset where health is viewed holistically encompassing individual wellbeing, community impact, and environmental responsibility. As a result, sustainability is no longer seen as separate from health but rather as an essential factor in making food choices that feel good for both the body and the planet.

Across demographics, sustainability and ethics remain a shared priority.

- Regardless of age, race, location, or household composition, sustainability remains a unifying theme in food choices. This broad resonance signals that sustainability is not a niche concern tied to specific demographics—it is a mainstream expectation shaping purchasing decisions across the board.

Planet

Food & Bev. products made with more sustainable label claims and certifications drive growth

Certified Regenerative Organic	+21%
Labeled 100% Organic	+16%
Certified Greener World: Non-GMO	+13%
Labeled Vegan	+6%
Certified Non-GMO Project	+2%

Animal

Food & Bev. products made with animal welfare labeling consistently see double-digit growth

Grass Fed	+40%
Free Range	+38%
Cage Free	+31%
Pasture Raised	+30%
Animal Welfare	+17%

People

Food & Bev. Products that avoid ingredients believed to be negative, and those that regulate ethical business practices saw significant sales growth

Certified Seed Oil Free	+230%
Nitrate Free	+15%
Antibiotic Free	+15%
Fair Trade	+12%
Certified B Corp	+3%

**Percentage figures represent $ % Change vs. YAGO*

- Certifications have become a cornerstone of shopper trust, transforming purchase decisions into lasting relationships with brands. Non-GMO stands out as a leader; consistently driving repeat purchases and reinforcing loyalty across multiple departments. For shoppers, this seal represents more than a label - it's a a desired value that keeps them coming back.

% Of Consumers Who Say Sustainability/Ethical Practices Are Very/Extremely Important[1]

2 Why Shoppers Eat "Healthy"

Key topics include:

- "Healthy" Motivators
- Focused Efforts

“Healthy” Motivators

Shoppers’ perceptions of what defines “healthy” often guide their choices in the aisle, but perception alone doesn’t tell the full story. Beneath every decision lies a set of personal priorities that influence how they balance health with taste, cost and all the factors that go into their purchase decisions. By looking beyond surface-level perceptions and uncovering the “why” behind decisions, we gain a clearer view of how healthy eating priorities truly shape motivations.

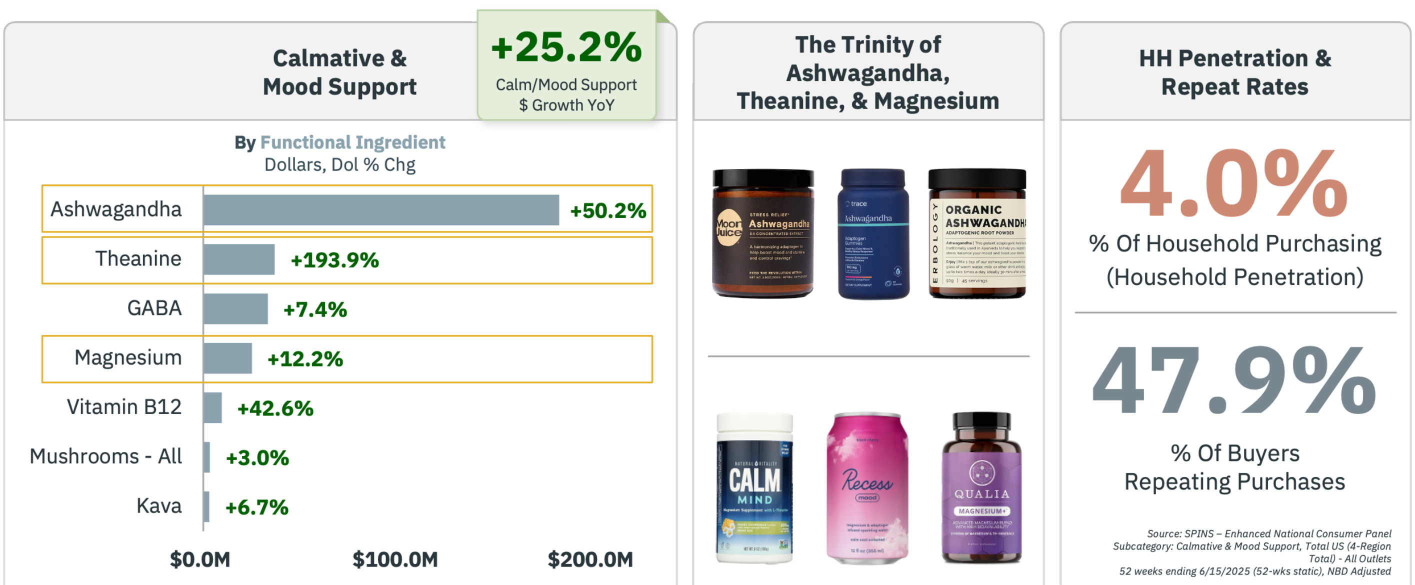
Healthy eating choices are defined by personal outcomes for weight management, better mood and energy.

The phrase “health is wealth” takes on new meaning as shoppers increasingly define wellness through the personal outcomes they seek. Weight management remains a primary concern, as individuals work to align their health goals with the realities of hectic schedules and the challenges of portion control. Mood support has also risen in importance, fueled by a growing recognition of mental well-being as an essential part of overall health and self-care. Energy continues to be a critical driver, with shoppers seeking products that help them sustain focus and stamina throughout demanding workdays, family responsibilities, and active lifestyles - without relying on short-term fixes that lead to a crash. Collectively, these priorities signal a shift away from abstract notions of health toward tangible, immediate benefits that can be measured, felt, and seamlessly integrated into daily routines.[1]

- Households with kids <18 ranked energy as their top health motivation, while Boomers placed greater emphasis on disease prevention over appearance. Asians were more likely than other groups to prioritize disease prevention in their top four rankings, whereas Gen Z, higher-income households, and urban adults leaned toward environmental motivations for healthy choices.[1]
- With the continued rise of GLP-1s, shoppers are looking to fill nutrient gaps created by reduced food intake and appetite changes. There is a focus on products that help maintain energy, muscle, and overall balance when meals get smaller.[5]

GLP-1 Companion Categories			
Category	**Dollars**	**Dol % Chg**	**Unit % Chg**
Protein Supplements & Meal Replacements	**$9.6B**	**+11.1%**	**+14.5%**
Multivitamins, Minerals, + Vitamin B	**$5.7B**	**+6.2%**	**+3.8%**
Pre/Probiotics + Fiber Products	**$2.0B**	**+8.7%**	**+6.1%**
Calmative & Mood Support Supplements	**$0.4B**	**+25.2%**	**+26.3%**
Supplements Green Food	**$0.4B**	**+2.5%**	**+2.8%**

- Stress management has become a cornerstone of wellness, and shoppers are gravitating toward tools that feel safe, effective, and easy to integrate. Adaptogens like ashwagandha and calming minerals like magnesium are leading this space as shoppers seek potential benefits for relaxation, emotional balance, and sleep support. The biggest shift is these products moving from ‘as needed’ to more frequent use. Shoppers are proactively building mood support into their wellness routines rather than reaching for solutions only in crisis.[5]

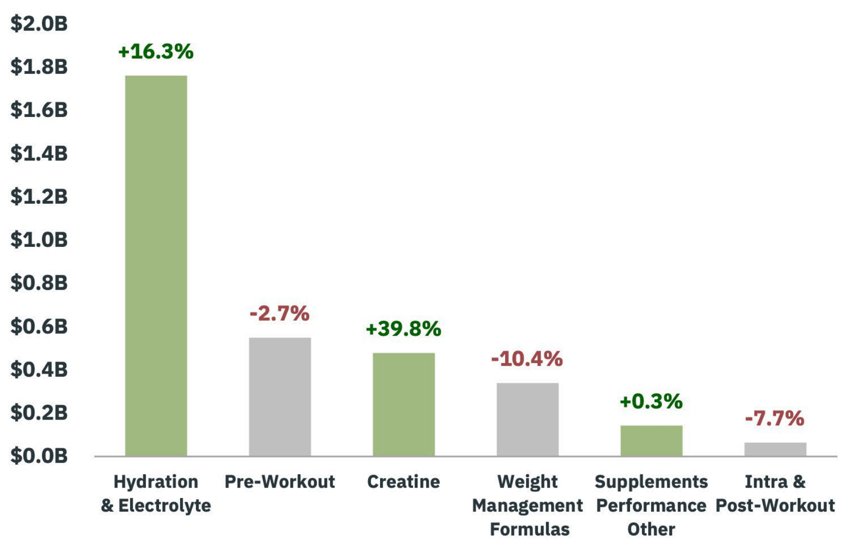


- The active nutrition space has evolved beyond the gym into a daily wellness ally. Performance categories like creatine and hydration now appeal to anyone wanting to feel and perform better, not just athletes. Some shoppers are seeking sustainable energy, recovery, and focus on convenient formats like stick packs and powders. Lifestyle drivers include functional wellness and seamless integration into morning routines, work breaks, and evening recovery.[5]

Performance Nutrition

+10.8%
Performance Nutrition
$ Growth YoY

By Subcategory
Dollar Sales, Dol % Chg, Unit % Chg



Unit % Chg:	+15.9%	-0.6%	+49.3%	-12.5%	-3.9%	-7.6%

Product Examples

Hydration & Electrolyte

Pre-Workout

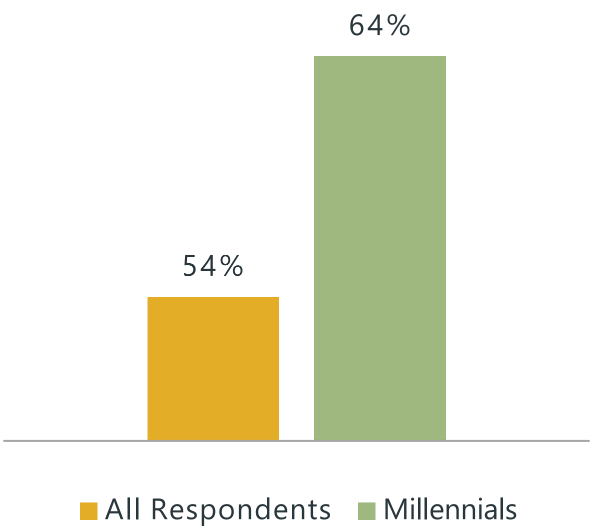
Creatine

Supplements Performance

Focused Efforts

While the vast majority of shoppers report making a sustained commitment to healthy eating choices, each eating occasion throughout the day offers particular opportunities where shoppers are faced with different pressures that will shape how much effort they put into making a healthy choice and which kinds of products they pursue in order to achieve a healthy eating choice. The factors that shape the timing and effort that go into healthy eating choices vary for shoppers by generation, time of day, and eating occasion.

Percentage Of Shoppers Who Put "A Good Amount" Or "A Lot" Of Effort Into Making Healthy Choices



Millennials are the most health-conscious generation.

- While a healthy majority (68%) of shoppers claim to often or always try to make healthy eating choices, 73% of millennials reported an attempt to make healthy choices often or always.
- These differences in total respondent percentages versus millennials reflect a trend shown throughout the survey data: overall, millennials are the most health-conscious and wellness-committed generation in their shopping and eating behaviors and perspectives.[1]

Time of day and eating occasion impact healthy eating decisions.

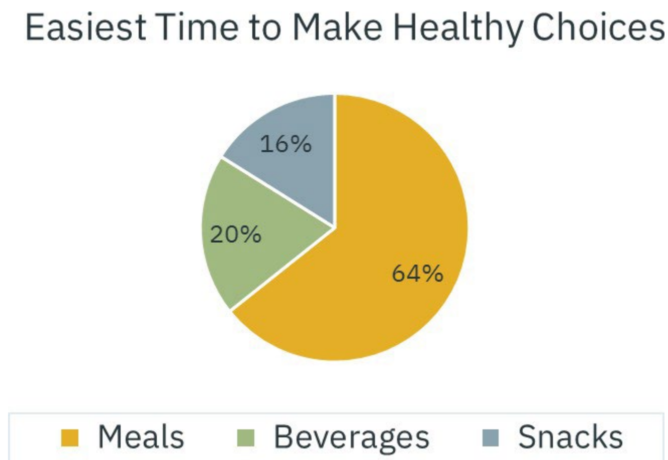
- By a large margin, shoppers saw main meals like breakfast, lunch and dinner as the easiest time to make healthy choices, while beverages and snacks trailed by similar percentages. Of the main mealtimes, dinner was chosen as the meal where shoppers put the most effort into healthy options, followed by lunch and then breakfast.[1]

Shopper Insight

"We try to teach our children the healthiest choices... so they can start to make those choices for themselves," she explains. "If we model that for them, they're learning what is good for them."

- Female, AR, 6 Person HH

Time of day and mealtimes that are shared among a household rather than experienced alone or on-the-go during a busy work or school day may influence these perceptions. Breakfast, lunch, and beverages or snacks are often consumed separately by various household members who have different constraints that impact their ability to make effort for healthy choices at those occasions, dinner is typically shared by the whole household and used as an opportunity to model healthy choices for children. As one of the last meals of the day, dinner also offers the chance to catch up on nutrients that were not consumed at earlier eating occasions in the day.



- Across the board consumers are seeking out and bringing to their basket products that bring more to the table. Natural products from naturally positioned brands, including those that offer certain ingredient standards, and/or environmental and sustainable mission-driven benefits, is seeing strong unit growth. Specialty products bring a premium or functionality to their product also maintaining unit growth while conventional positioned products face declines.[3]

Unit Growth	Meals	Beverages	Snacks
Conventional*	-0.6%	-0.7%	-0.9%
Specialty*	+3.1%	+3.8%	+3.5%
Natural*	+4.6%	+5.8%	+5.5%

*SPINS owns a proprietary definition of Conventional, Specialty and Natural product segmentation to support partners in understanding.

- Natural: Captures products from naturally positioned brands, including those that offer certain ingredient standards, and/or environmental and sustainable mission-driven benefits.
- Specialty: Products falling into two groups 1) perceived as artisanal, premium, locally crafted, or culturally unique 2) stress "functionality" and promoting better-for-you ingredients
- Conventional: All other items outside of Natural and Specialty defined products.

3 Realities in Store

Key topics include:

- Seeking Claims vs. Sales Trends
- Add Positives or Remove Negatives?
- Consumer Perspective vs. Store Sale's Reality

Seeking Claims vs Sales Trends

Healthy eating perceptions center around the pursuit of beneficial ingredients or nutritional profiles and the avoidance of ingredients perceived as harmful or lacking nutrients. The "seeking positives" versus "avoiding negatives" behaviors translate differently into actual purchases across categories and by generation or household type.

Top healthy attributes include a combination of nutrients to seek and ingredients to avoid

- When presented with a variety of product claims, high protein (41%), no added sugar (36%), and no artificial ingredients (30%) were the three most popular "healthy" attributes that shoppers actively looked for when buying food.[1]

Demographic View

In addition to high protein, no added sugar and no artificial ingredients:

Gen Z & Millennials are *more likely* to look for organic, added functional ingredients, plant based, sustainability or ethically produced products and recyclable or compostable packaging.

Gen X & Boomers are *less likely* to look for added functional ingredients, sustainability or ethically produced products and recyclable or compostable packaging.

When comparing categories across high protein, no added sugar, and no artificial ingredients, yogurt is unique in delivering growth across all three, setting it apart in store.

- Yogurt is unique in this survey, as yogurt saw strong unit growth among attributes to seek & avoid as the wide variety of options allows consumers to tailor their choice to their own needs.
  - Yogurt containing 10g+ protein, no added sugar, and no artificial ingredients (Vital Clean*) experienced the largest increase in absolute unit growth compared to any category with these attributes. This category stands out while it delivers on shopper priorities: both meal & snack, familiar ingredients, satisfying, diet friendly and affordable.
  - Other categories that saw strong growth among these same three attributes are snacking and beverage , including high protein Tortilla & Corn Chips, no added sugar Wellness & Nutrition Bars, and Vital Clean* Soda.[6]

1 High In **Protein**	2 **No Added** **Sugar**	3 **No Artificial** Ingredients
What products are growing in units with these claims?		
>10g+ protein	**No Added Sugar**	**Vital Clean***
Yogurt +252M	Yogurt +50M	Yogurt +214M
Mac & Cheese Mixes +11M	Wellness & Nutrition Bars +28M	Soda +45M
Tortilla & Corn Chips +7M	Energy Drinks +20M	Jerky & Meat Snacks* +32M

*SPINS Attribute name that identifies products that are free from artificial colors, flavors and preservatives

Add Positives or Remove Negatives?

Across demographics, preferences in how attribution appears on labeling highlight the importance of tailored language.

- The majority of shoppers find positive healthy attributes on labeling (57%) more important than avoiding negative ones (43%).[1]

HOWEVER….

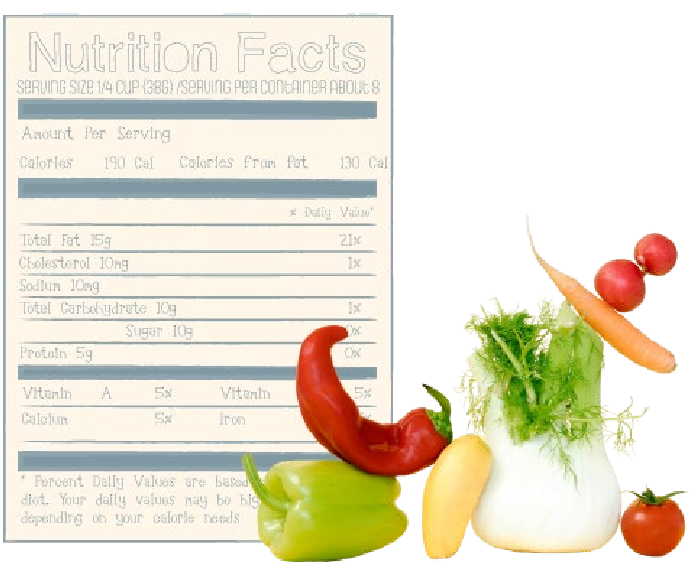
Younger generations favor **positives**; while **older generations** focus on avoiding **negatives**

Households with kids respond even more positively to **positive** messaging (70%!)

People residing in **small towns** prefer avoiding **negatives** in messaging (54%)

Taking a deeper look at shopper preferences when faced with specific examples of products they would be asked to purchase, the statement 'it depends' takes on increasing relevance as shoppers apply their health definitions differently among varying products. Quite often shoppers will "say" that they prefer certain attributes, but their actual purchase behavior shows that they "do" something different.

For the purpose of the consumer survey conducted, eight generic products were fabricated, and consumers were asked about preferred choice. Products were designed in simple graphic form with different attributes noted. As we look across the eight specific example scenarios, we see consumers gravitating more toward avoiding negatives, but it is a close split.



Consumers “Say” They Choose:

Product		Which would you choose?	Percent
	**Cola**	Added probiotics and added fiber	41%
		No calories (artificial sweetener)	59%
	**Tortilla Chips**	Added protein	29%
		Organic with no artificial colors, flavors or preservatives	71%
	**Wheat Bread**	Added fiber (not whole grain)	26%
		Whole grain with nuts and seeds	74%
	**Ranch Dressing**	Plant-based ingredients, low sodium, or low added sugar	59%
		Low calorie (artificial sweetener)	41%
	**Cookie**	Added protein or fiber	72%
		Gluten-free ingredients	28%
	**Flavored Yogurt**	Low added sugar, real fruit	66%
		No added sugar (artificial sweetener)	34%
	**Applesauce**	Antioxidants added	27%
		No added sugar	73%
	**Pizza**	No artificial colors, flavors or preservatives (no nitrates/nitrites)	64%
		Cauliflower crust with added fiber	36%

Say vs Do: Shopper Perspective vs. Store Sales Reality

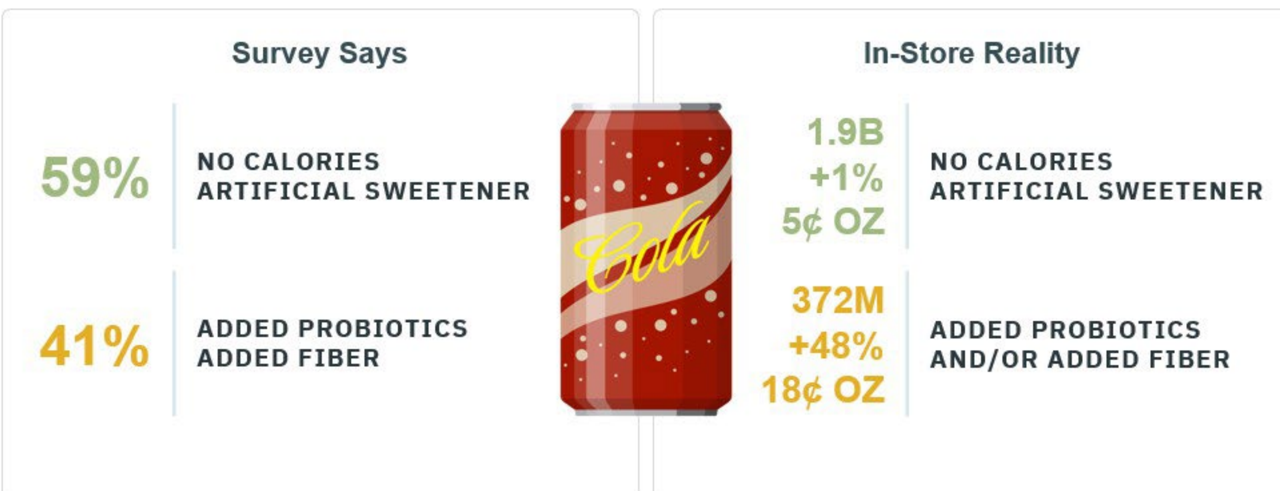
The factors of in-store realities influence what ends up in shoppers' baskets at check-out, including price, convenience, availability and more. Based on what shoppers reveal about their health attitudes and aspirations, the desire to purchase "better-for-you" versions of familiar products is here. Yet when looking at actual performance of these alternatives compared to their traditional counterparts, behavior and sales tells a different story. Shoppers may not be ready to fully trade their current habits - or sacrifice familiar taste, protein levels, and functionality for the promise of a healthier format just yet.

Shopper Insight

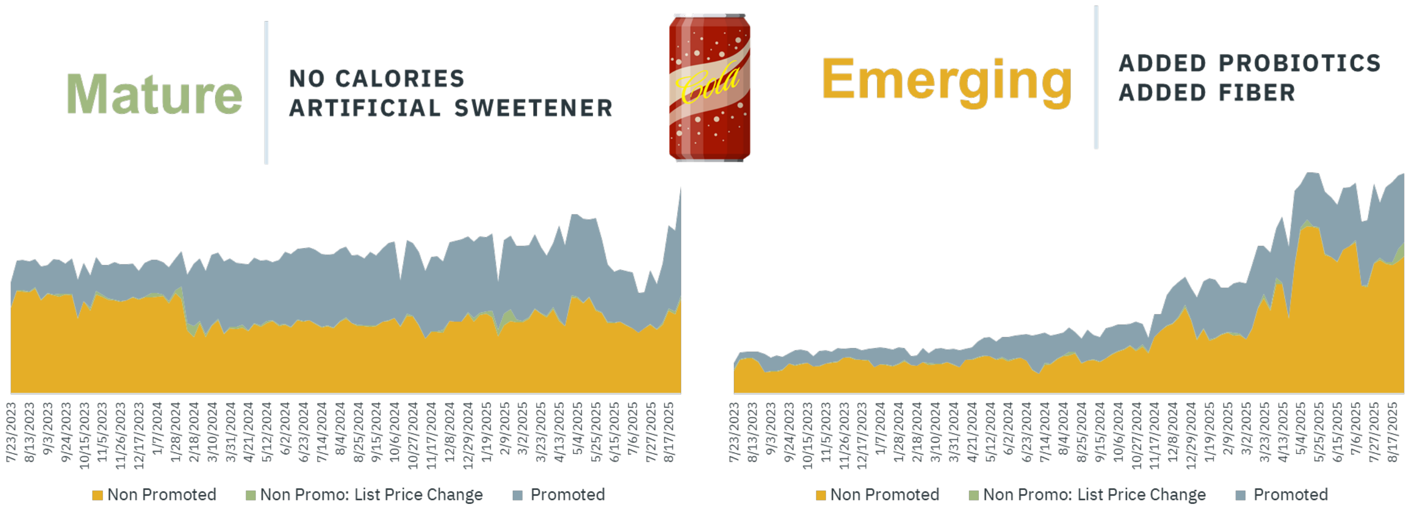
"Artificial sweetener... causes cancer. That's where my brain immediately goes.... I just changed the way I was eating by focusing on foods that support regularity and gut function... and I've lost 56 pounds"

- Female, GA, 4 Person HH

- Cola is a perfect example. Throughout the survey, consumers repeatedly cited artificial sweeteners as something to avoid, however a majority of those that would purchase cola chose no calories with artificial sweeteners.

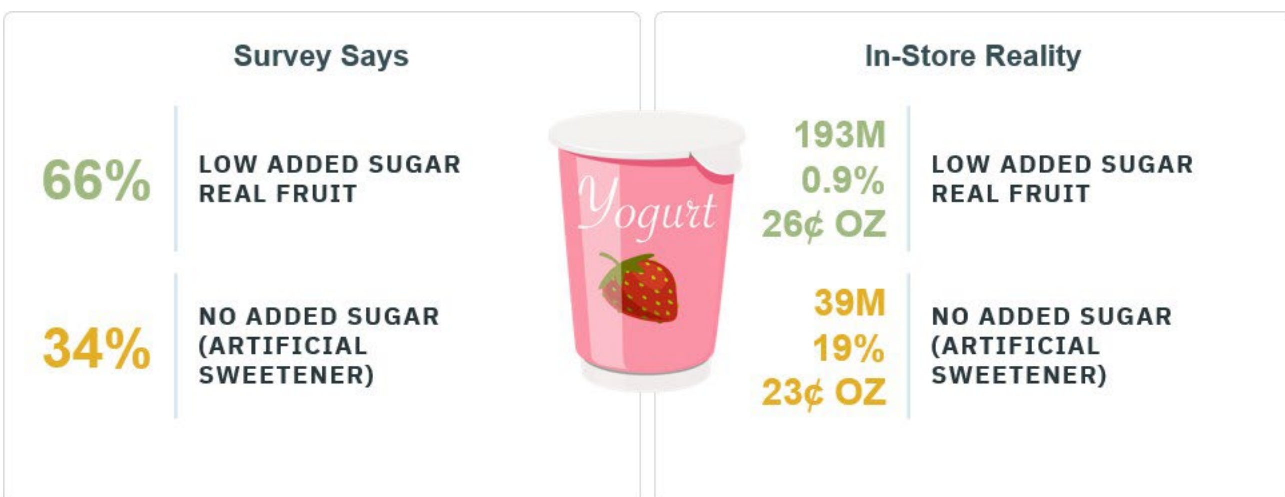


- Cola also showcases the difference of a mature product in the space versus the emerging trend. We see noticeably higher and consistent distribution with no calorie artificial sweetener. Additionally, nearly 65% of the promotions focus on the stock-up deals – encouraging the purchase of two or more units at a time to pantry load. As the emerging product gains traction, you see the uptick in the distribution, and along with that promotional support.[8]



Datasembly
a SPINS company

- Yogurt now spins what we just saw with cola on its head. More shoppers would choose low added sugar with real fruit, versus no added sugar (artificial sweetener). As we look at sales in store, we see that while low added sugar real fruit is larger, no added sugar with artificial sweetener is growing at a faster rate.



Research across the series of products analyzed found that shoppers weren't always consistent. Their choices on various attributes varied by category. Moreover, a review of the products studied relayed that shoppers flipped their earlier perspective on including beneficial nutrients vs. avoiding negatives. You may recall that overall, about 60% of shoppers favored beneficial nutrients and 40% avoiding negatives. However, in providing feedback on the series of specific products, the preferences for avoiding negatives outweighed beneficial nutrients by about 60% to 40%. Overall, shoppers relayed they want to make better choices, but their definitions of "healthy" vary. The tension between intent and practicality remains. Cost, convenience, and routine behaviors continue to shape purchasing decisions. Information will be key to helping shoppers make choices.

Shopper Insight

““We try to focus on filling our body with good things like protein…We avoid snacks or meals that are high-calorie but low in nutrition.”

- Female, AR, 6 Person HH

Tortilla Chips[7]		
Which Would You Choose?	**Survey Responses**	**In-Store Reality**
Organic, No Artificial Colors, Flavor, Or Preservatives	71%	337M -3%
Added Protein	29%	220M +18%

Pizza[7]		
Which Would You Choose?	**Survey Responses**	**In-Store Reality**
No Artificial Colors, Flavors, Or Preservatives (No Nitrates/Nitrites)	64%	1.2B -7%
Cauliflower Crust Added Fiber	36%	191M -15%

Conclusion

Change begins with good intentions, but translating those intentions into action is far more complex. Today's shoppers genuinely want to make better choices, yet their personal definitions of "healthy" are anything but uniform. More shoppers are scrutinizing ingredient lists and nutrition panels, seeking products that deliver added benefits aligned with their personal health goals. At the same time, long-standing concerns around sweeteners, food dyes and other ingredients continue to shape perceptions of what is truly "better-for-me". Despite growing health aspirations, the tension between intent and practicality remains. Cost, convenience, and routine behaviors continue to shape purchasing decisions. In the end, the pursuit of healthier living is an ongoing balancing act between what shoppers want to do and what daily life allows - shaping a marketplace that continues to evolve in both intention and action.

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