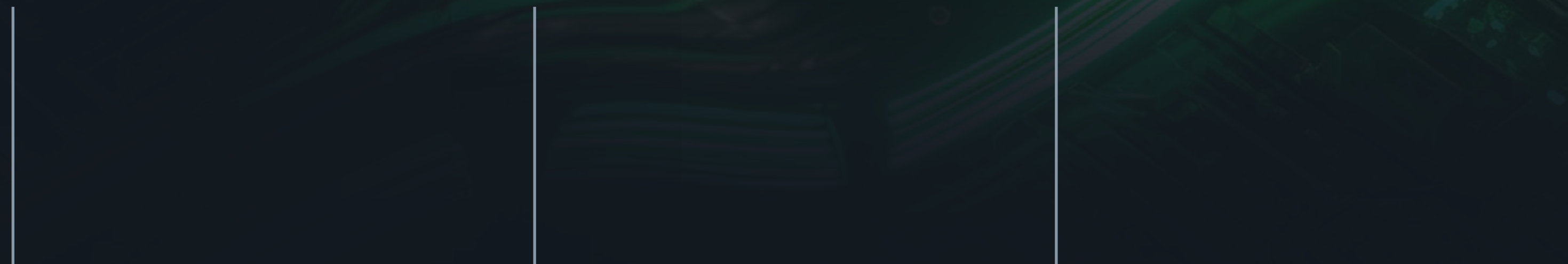


OCTOBER 2025

The Food Institute Report

Innovative Trends for 2026





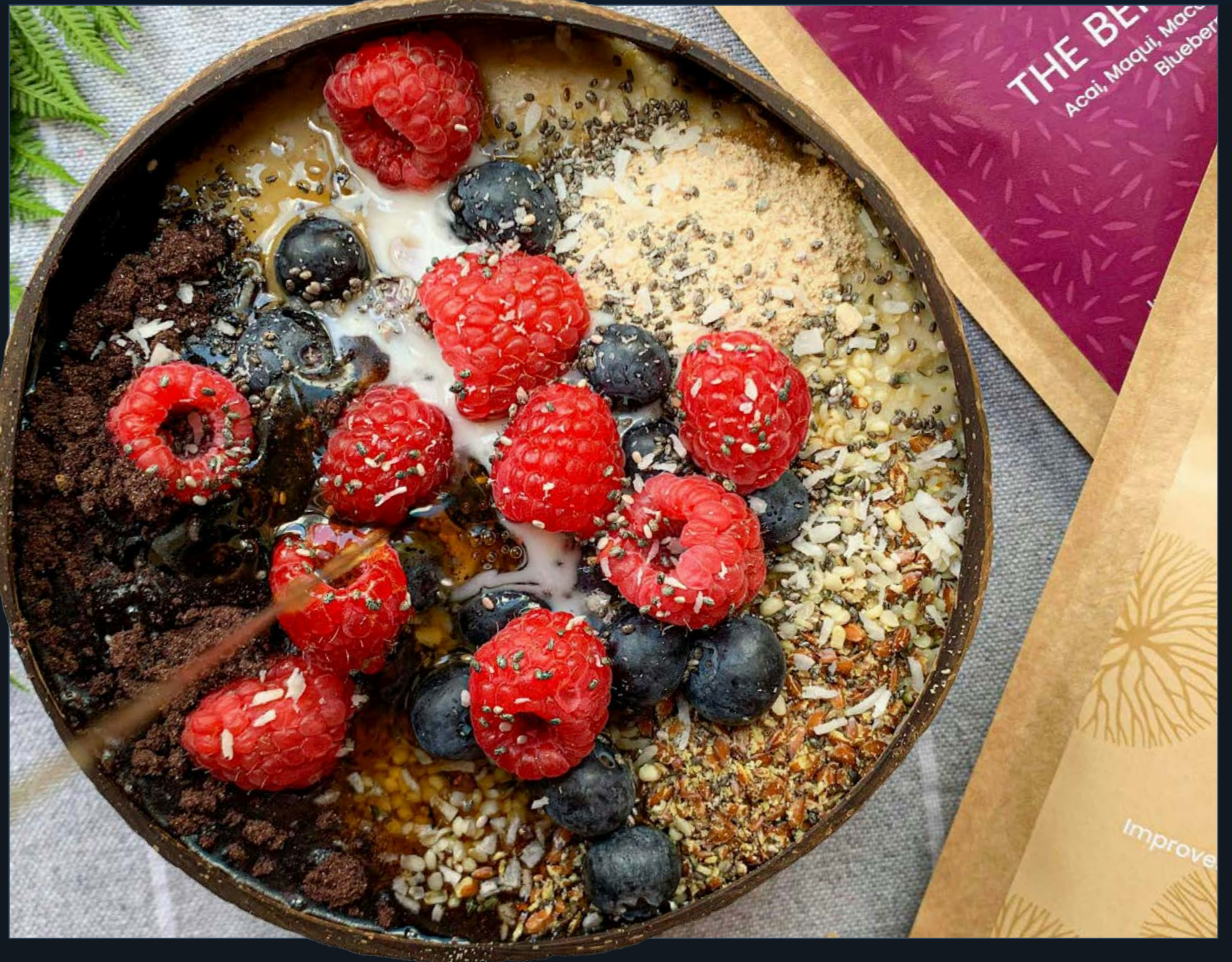
Cleaner Than Clean

BY GEORGE HAJJAR

Since the pandemic, the market has gradually shifted to empower consumers to consider the health and wellness implications of their food choices, with a “food as medicine” approach that has compelled many to consider ingredient labels.

The Biden administration began banning previously approved FDA-approved additives, such as Red Dye No. 3, and now, the Trump Administration has launched a “Make America Healthy Again” (MAHA) movement that has continued to scrutinize artificial additives.

Irrespective of political affiliations, consumers are asking for the food industry to operate with their best interests in mind, and food companies are responding, with leaders such as Conagra, J.M. Smucker Co., and Walmart’s Private Label portfolios, pledging to voluntarily remove these ingredients.



"We'll continue to see the marketplace looking for an alternative to ultra processed snacks,"

– DAVID ALLRED, CO-FOUNDER AND CEO, SLÄCKA

"With the sheer breadth of what has happened in the food and beverage industry this year, 2026 is poised to become what could be the year of the ingredient," William Grand, co-founder and CEO of NutriFusion told *The Food Institute*, adding that ingredients will be at the center of the better-for-you movement.

Food manufacturers will look to healthy components that amplify nutrition profiles, and, when appropriate, help consumers hit macros such as fiber and protein in order to satiate the loyal consumer base and draw in the modern health-conscious shopper, said Grand.

At Groceryshop 2025, Whole Foods chief merchandising and marketing officer Sonya Gafsi Oblisk noted that there are two dynamics affecting the market: the absence of negatives and the presence of positives. Consumers are shifting away from

Legacy CPG Brands Aim to Remove FD&C Color Additive Use



Source: FDA

questionable additives and preservatives while also seeking out on-trend, functional ingredients.

She explained that within this dichotomy, there is an overarching movement towards less processed foods being a source for nutrient density.

Kyle Harder, CEO of Elephant Amaro, noted how this trend extends beyond the pure ingredient label to create a wraparound experience grounded in the physical world. He offered a perspective from the alcohol world that has implications across the F&B industry.

“Shoppers want spirits from real ingredients produced in places they can travel to see, touch, and feel, and produced by real people – small independent operations – as opposed to corporations,” said Harder.

This trend also has implications in the next wave of plant-based products in 2026. Plant-based 1.0 burnt many curious shoppers by failing to deliver clean label options as well as other factors such as taste and price. Now, however, plant-based 2.0 has ushered in a new era of consumption that emphasizes whole food ingredients with minimal processing and center-of-plate options that platform vegetables.

“2026 will be less about imitating meat and more about having a clean label, minimally processed products with different protein sources like legumes, mushrooms, and chickpeas,” said Eran Mizrahi, founder and CEO of Source86. ●



Source: NIQ, BASES Quick Question Omnibus Survey, May 2025, n=1,000



Food Labels: A Key Touchpoint for U.S. Consumers

83%

read food labels before making a purchase decision.

64%

pay more attention to labels now than five years ago.

What Adults Look at First When Reading Food Labels



Source: NSF



Sustainability is Also Top-of-Mind for U.S. Consumers

67%

consider sustainability factors important in food purchasing decisions.

39%

feel current food labels adequately address sustainability.

69%

would like to see ethical sourcing information on product labels.



GLP-1: From Culture Shock to Culture Shift

BY GEORGE HAJJAR

There's an interesting thing happening in the **grocery aisle**: assortments are changing to meet the needs of the maturing GLP-1 consumer, but these assortments have a larger mass appeal.

"We're seeing... protein and 'whole food' based ingredients—less processed foods being a source for nutrient density—which combine to align with a GLP-1 diet," Sonya Gafsi Oblisk, chief marketing and merchandising officer at Whole Foods said in a show floor conversation about grocery trends at Groceryshop 2025 in Las Vegas, Sept. 28-Oct. 1.

These macro-nutrient rich and lower calorie-count offerings synergize with the GLP-1 diet but also meet the needs of a shifting consumer that continues to prioritize their personal health and wellbeing.

"Many people are actively seeking healthier yet satisfying alternatives to snacks," Släka's David Allred told *FI*.

Consumers Focus on Weight Loss and Health

36%

have tried to lose weight 3x in the last 3 years

40%

are on a diet to lose weight

42%

have looked to weight loss to improve long-term health

Source: Glanbia Nutritionals



As a result, CPGs will invest more in product reformulations that add on-trend nutrients such as protein, fiber, and digestive aids such as probiotics.

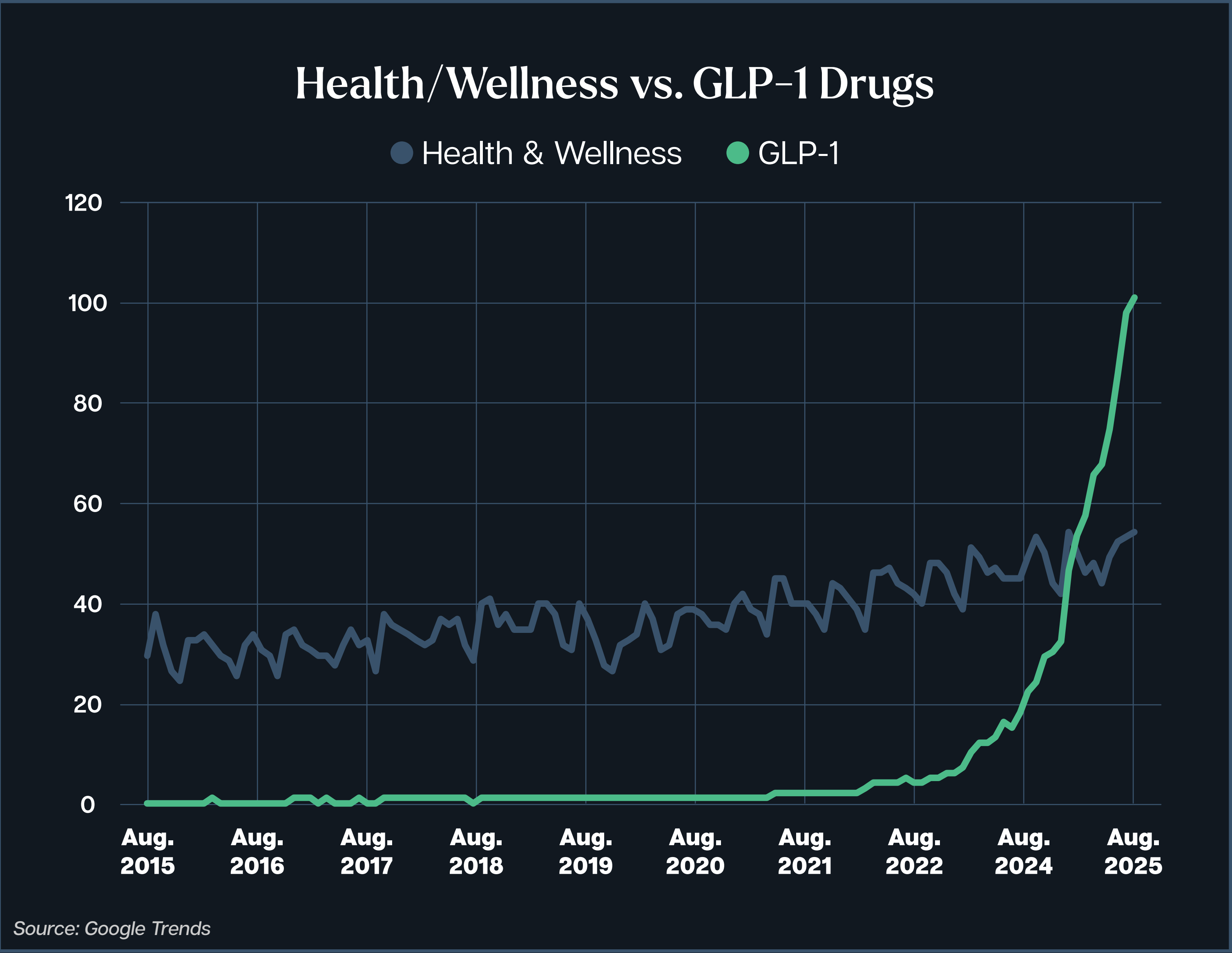
Allred, explained that snacks that target satiety provides a pharmaceutical-free way to control one's appetite, simulating the effects of GLP-1s. In the next year, both tactics are likely to take a larger share of stomach.

In fact, as much as 69% of consumers are interested in offerings that stimulate GLP-1 hormones in a natural way, according to research cited in a recent [FI webinar](#) on the topic.

Foodservice is also capitalizing on this trend with innovations that pack more protein into similarly-sized portions. Peet's Coffee and Starbucks, for example, are among a growing number of café chains offering protein-fortified coffee options. Additionally, Smoothie King recently debuted a menu tailored specifically for GLP-1 users.

To this end, Vitamix culinary director Derek Clayton recommended operators to also offer à la carte customization options, sharable dishes, and a mix of protein and whole food center-of-plate options to make the value proposition feature “fewer empty calories and more meaningful nutrition.”

Nevertheless, these changes don't mean indulgent categories are doomed. Consumers are complex and are still snacking on their sweets and confectionery. For example, data from NIQ Omnisales+ found that, within



"For consumers [GLP-1] drugs, every bite counts, and offering little ways to still indulge in a treat but without overeating, small portions are becoming more and more popular,"

– THIERRY SCHMITZ, GENERAL MANAGER, VANDEMOORTELE USA

TikTok Shop, a popular retail platform for younger generations, the "candy, gum, & mints" category is the third top-selling category, behind health & performance and beverages.

Eran Mizrahi, founder and CEO, Source86 summed up the next phase in the environment with the idea that GLP-1 treatment popularity will create stronger demand for portioned-controlled and better-quality products. Calls which manufacturers have already started to address.

"Think smaller packs, reformulated recipes, and food that feels more 'worth it' when people choose to indulge and have a snack or a sweet treat," said Mizrahi. ●

TikTok Shop Sales

\$7.6
billion



\$546
million

Total Store

Food

Source: NIQ

Snacks Are Among the Top Selling Categories On TikTok Shop



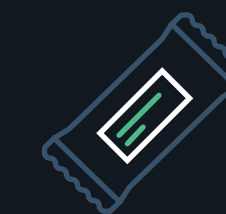
Health & Performance
\$117M | +51%



Beverages
\$100M | +206%



Candy, Gum, & Mints
\$99M | +132%



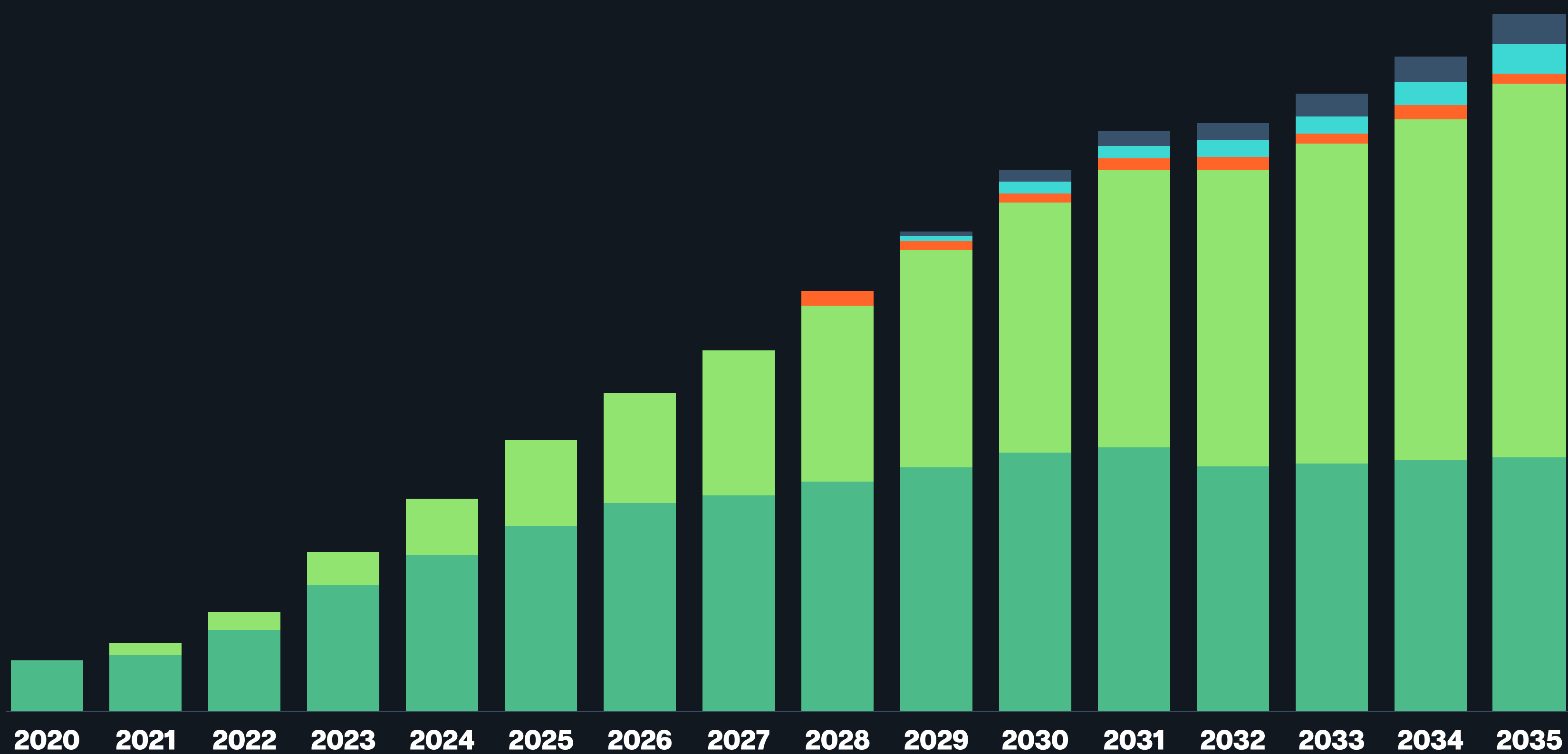
Nutrition & Cereal Bars
\$42M | +795%



Salty Snacks
\$30M | +104%

GLP-1 Market by Target Indications, 2024-2035 (USD Billion)

- Type 2 Diabetes
- Obesity
- Sleep Apnea
- Non-alcoholic Steatohepatitis
- Alzheimer's Disease



Source: *Research and Markets*

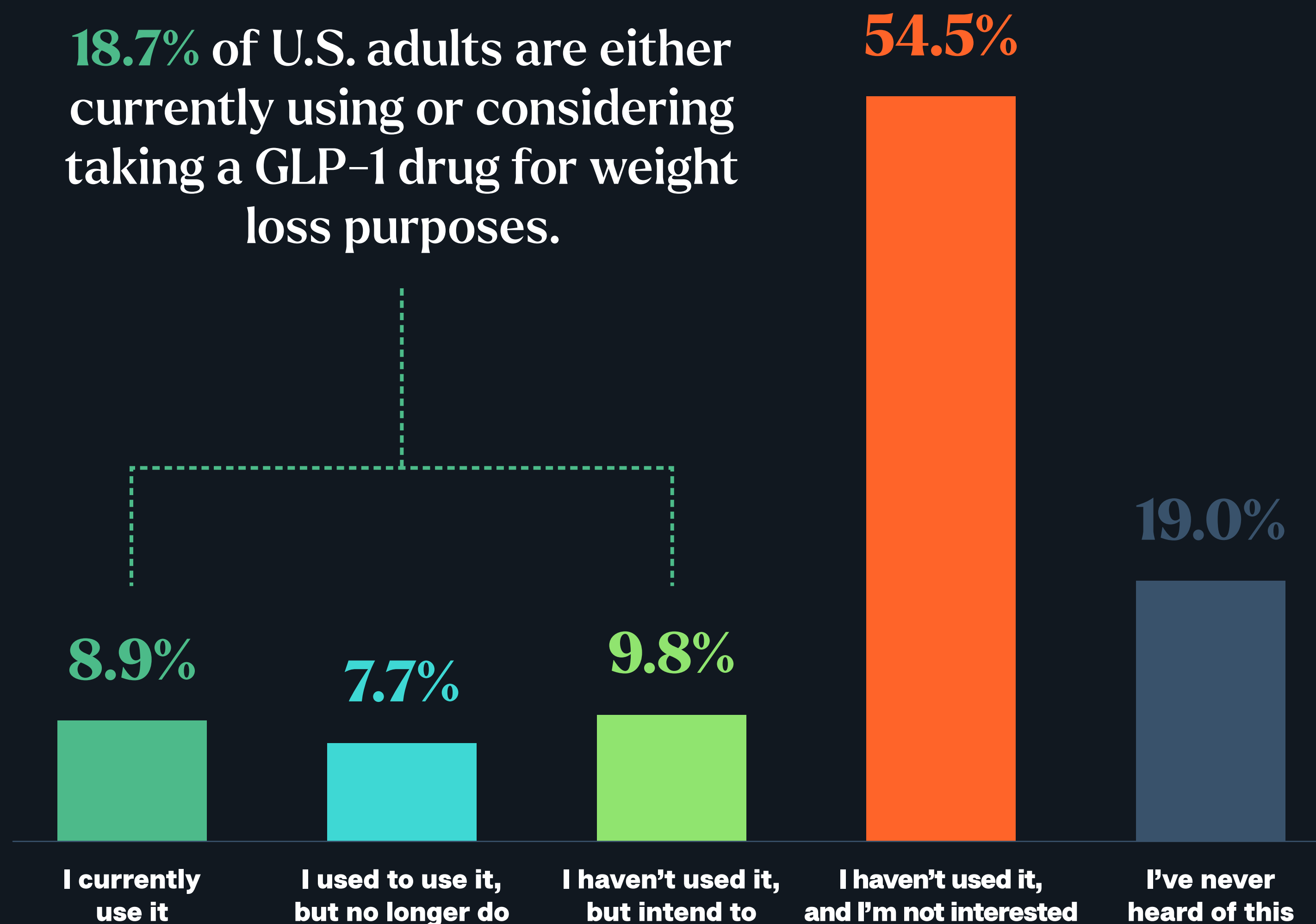


\$49.3
billion value in 2024

11.1%
CAGR 2025-2035

\$157.5
billion value in 2035

18.7% of U.S. adults are either currently using or considering taking a GLP-1 drug for weight loss purposes.



Source: *CivicScience, EY Parthenon*



GLP-1 drug adoption is growing quickly and could put up to a **\$12 billion** dent in the market growth of snack foods.

3%
potential loss in sales across salty, sweet, and confectionary snack categories due to GLP-1 drug adoption



Geopolitical Strife Dictates Food Decisions

BY GEORGE HAJJAR

"Global trade feels very fluid at the moment, offering little certainty. For food and beverage, that uncertainty is real: tariffs, climate shocks, and shifting policy can change cost structures overnight," David Gray, CEO of FedUp Foods, warned *FI*.












Tariffs are real, and for the time being, they're not going anywhere. Gradually, manufacturers and retailers are going to have to continue adjusting to these new realities. Food and beverage retailers are particularly vulnerable, with thinner relative margins than other consumer goods industry subgroups.

The scope of these tariffs impact everything from ingredients, to packaging materials, to specialty imports.

For Mike Perry, founder of Klatch Coffee, coffee imports



Outside the U.S., brands perceived as American are losing trust.

	Perceived as American	Purchase Impact	Trust Impact
 Global Average	52%	-22	-21
 Brazil	35%	-20	-20
 Canada	64%	-22	-21
 China	51%	-22	-19
 France	60%	-22	-18
 Germany	50%	-15	-20
 India	42%	-17	-10
 Japan	51%	-15	-22
 Mexico	53%	-15	-22
 Great Britain	49%	-26	-22
 United States	60%	+6	+9

Source: Ipsos Fresh Research, presented at Groceryshop 2025, September 2025

are its biggest concern, with Brazil coffee exports currently facing a 50% tariff rate. President Donald Trump has since indicated a willingness to exempt certain crops if a series of criteria are met, but these changes have yet to come to the import.

Perry noted how this will impact the landscape in the next year.

“In 2026, roasters like Klatch Coffee will continue exploring alternative coffee-producing countries as potential alternatives - a key challenge is ensuring those changes doesn't create a change in quality,” he said.

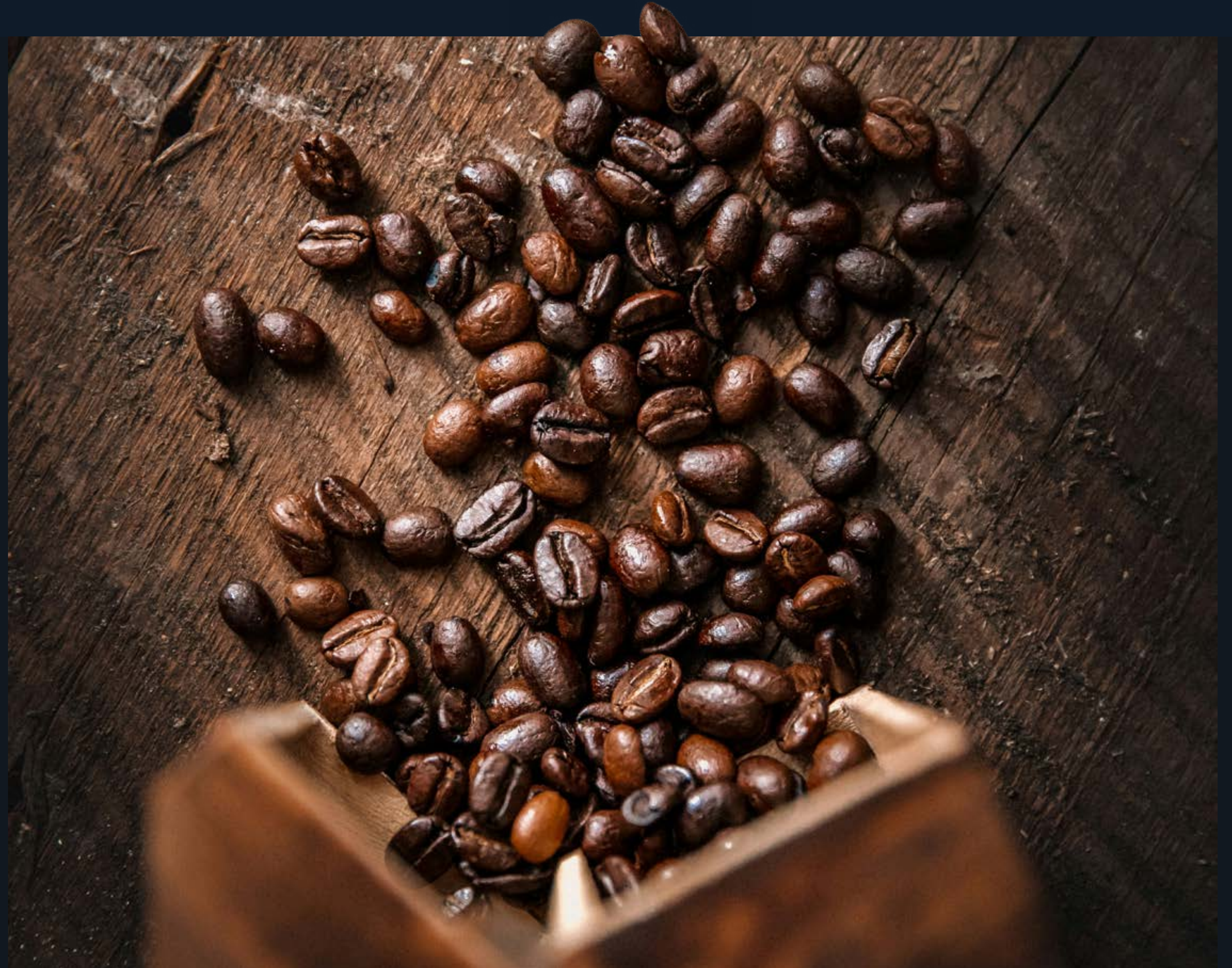
Similar pivots are likely to come to other companies that rely on specific imports that the U.S. doesn't typically produce or does not produce at the proper scale.

Other pivots we are likely to see related to tariffs include businesses attempting to evade specific classifications or terms to bear the brunt of a full tariff. Amrita Bhasin, CEO of Sotira, explained that substituting or modifying materials with the end to change import claims are likely to be more common in 2026.

“I expect the arbitrage opportunities around this to be significant especially for large U.S. food manufacturers and distributors,” she said.

Besides tariffs, regions' responses to environmental issues will continue to shake up the industry.

At the time of writing, the European Union has delayed once again its high-profile anti-deforestation law, European Union Deforestation Regulation, which would



"Global trade feels very fluid at the moment, offering little certainty,"

– DAVID GRAY, CEO,
FEDUP FOODS

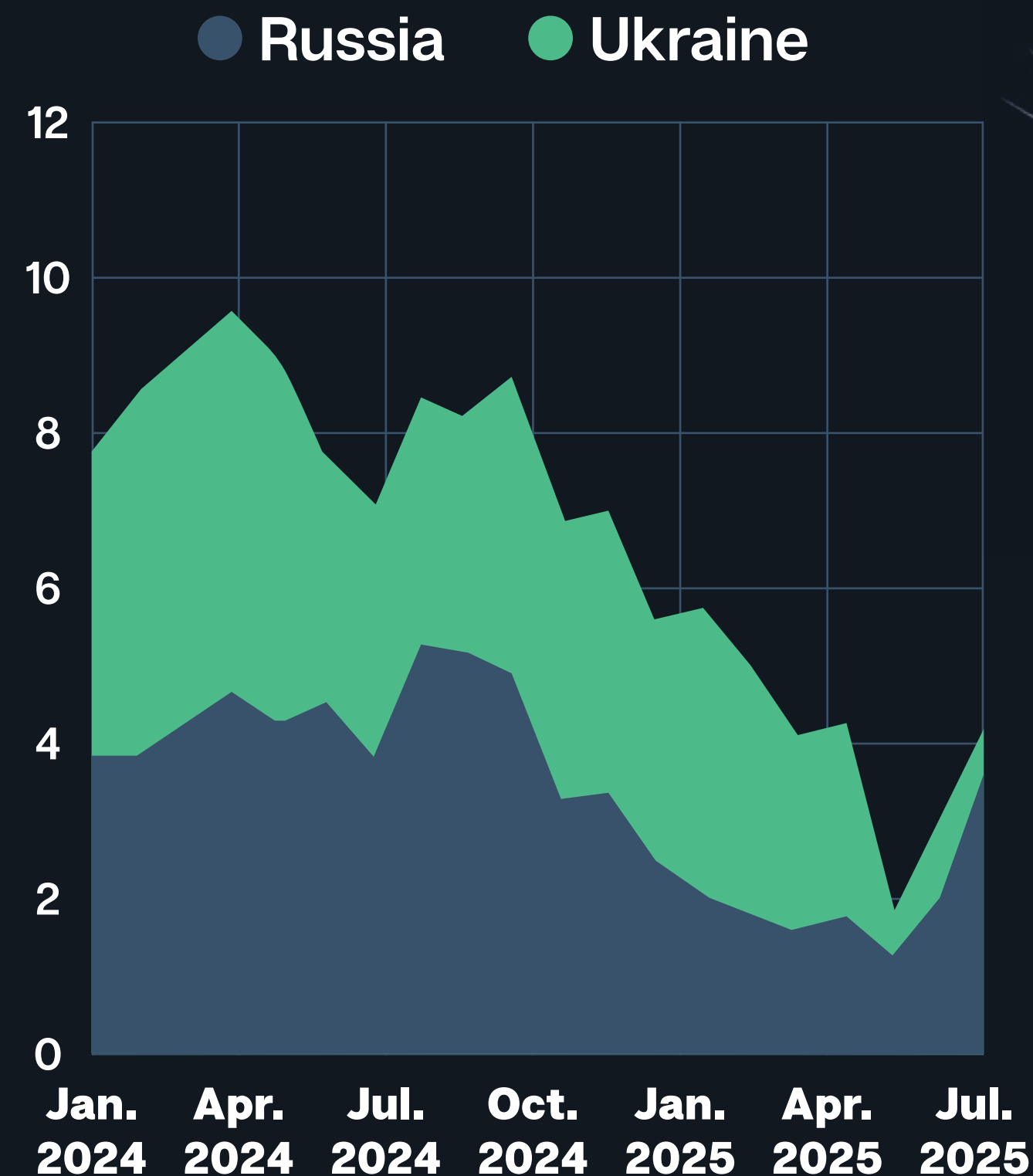
require businesses importing to and sourcing within the area to prove that certain commodities do not contribute to forest degradation. Additionally, inclement weather events continue to pressure key monocultures such as rice and wheat.

Compounding these factors is the ongoing war in Ukraine that threatens grain shipments out of both Ukraine and Russia. Once known as the "bread basket of the world," the onset of the war led to acute hunger issues in various regions.

Gray noted that he was protecting his private label beverage brand against these uncertainties through crop contracting diversification across multiple regions and investing in long-term supplier and retail partners.

"In 2026, I believe the companies that thrive... will make smart, values-aligned moves in real time, with teams and supply chains built to flex," said Gray. "The damage is too great for businesses to postpone strategies to protect against geopolitical turmoil. ●"

Russian and Ukrainian Grain Shipments, Million Tonnes



Source: [BIMCO](#)

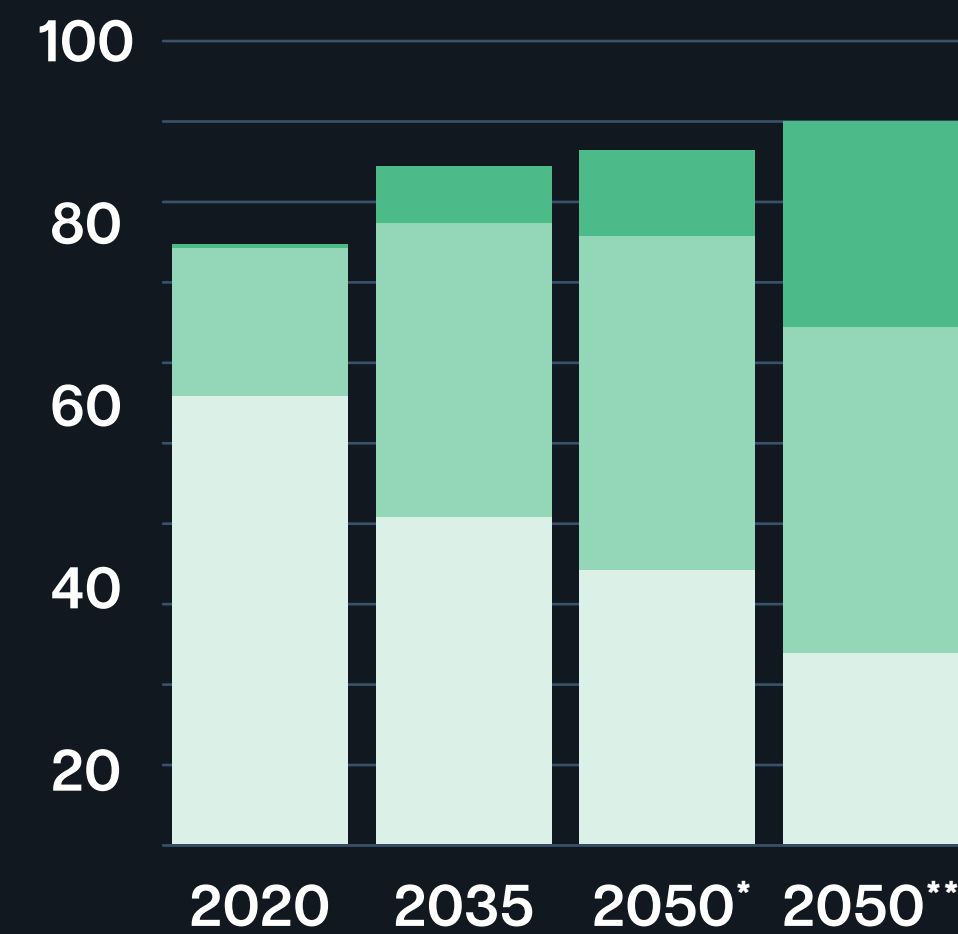


Rice



Heat Stress

% of rice production capacity exposed to heat stress risk

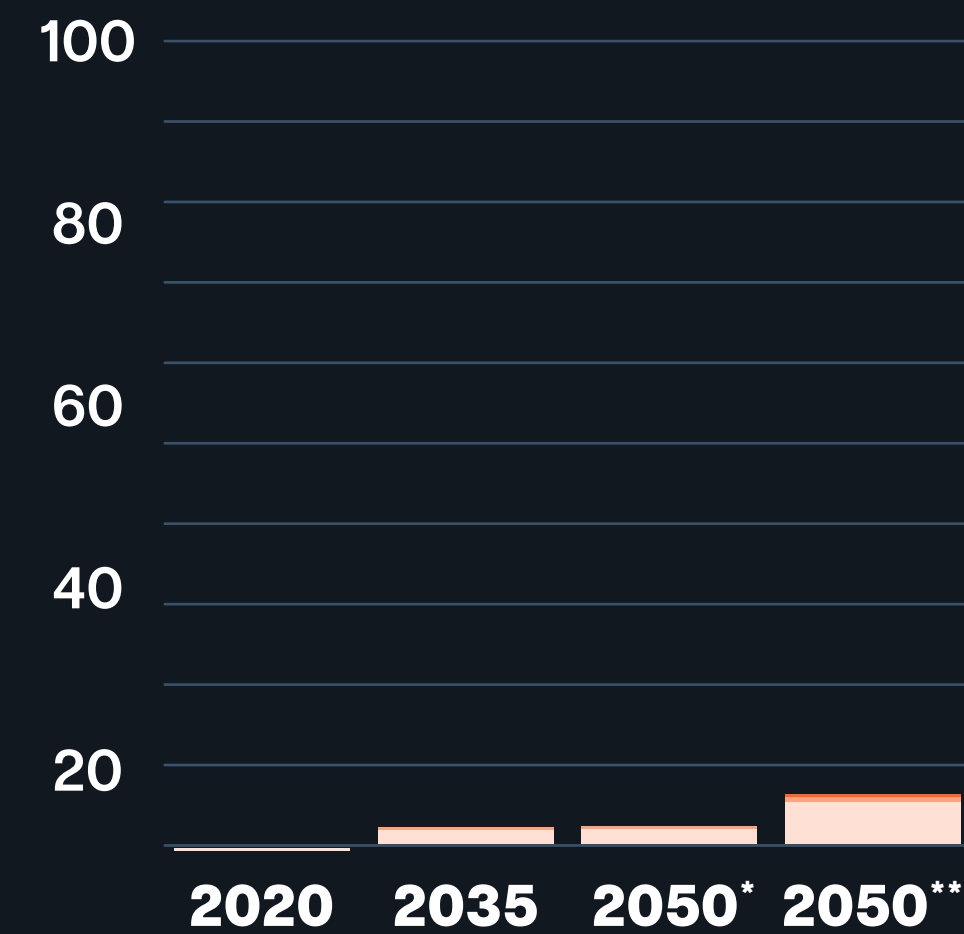


- Significant risk
- High risk
- Extreme risk

* Low emissions scenario
** High emissions scenario

Drought

% of rice production capacity exposed to heat stress risk



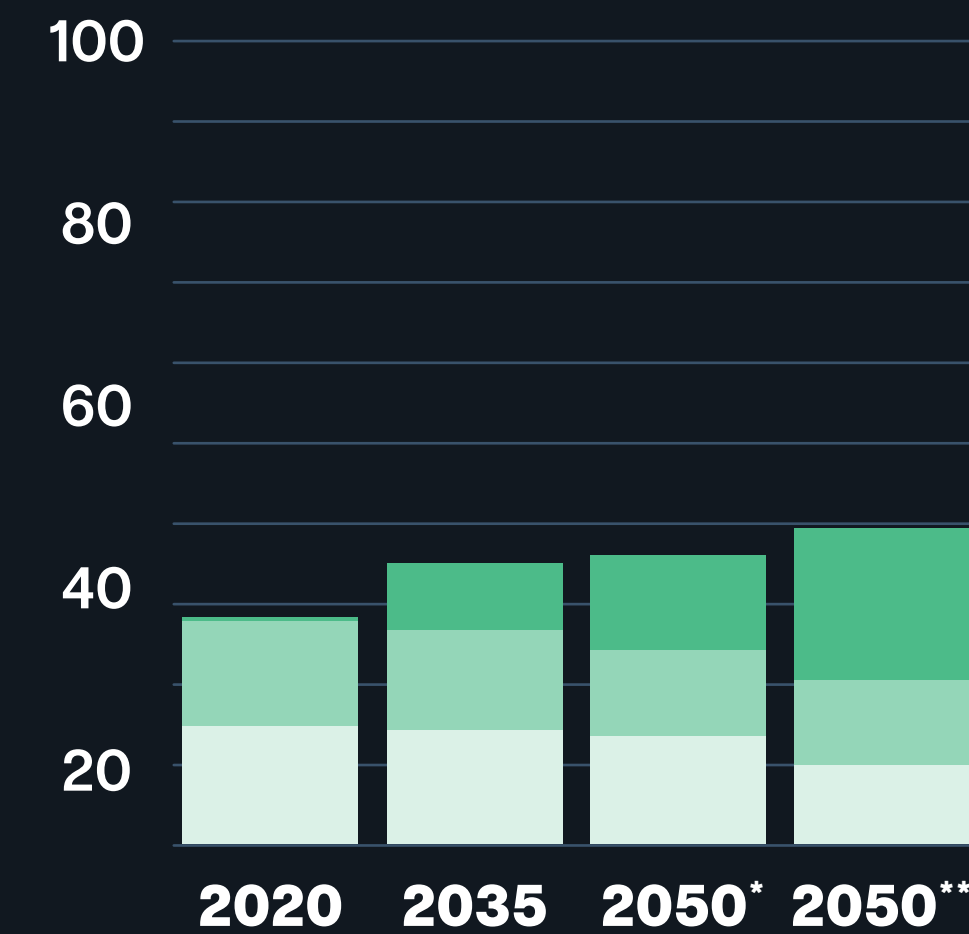
- Significant risk
- High risk
- Extreme risk

Wheat



Heat Stress

% of wheat production capacity exposed to heat stress risk

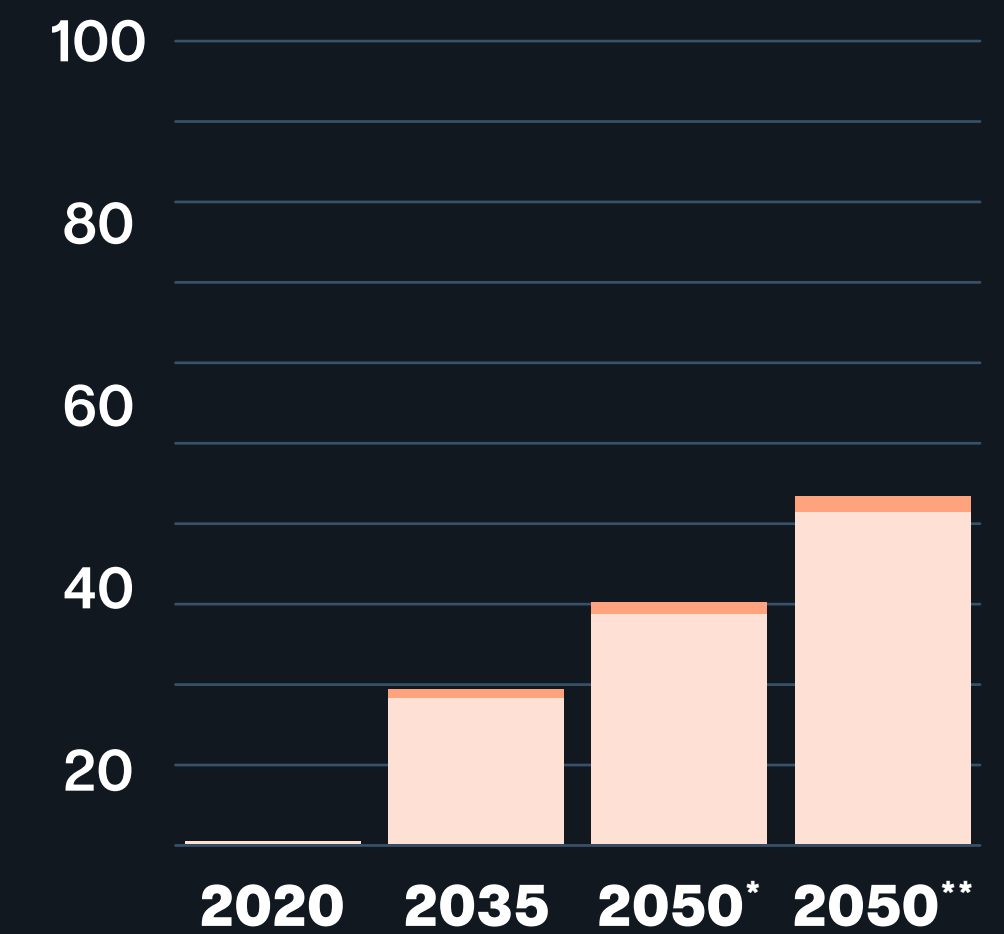


- Significant risk
- High risk
- Extreme risk

* Low emissions scenario
** High emissions scenario

Drought

% of wheat production capacity exposed to heat stress risk



- Significant risk
- High risk
- Extreme risk

Source: PwC



You Can't Ignore The Value-Obsessed Shopper

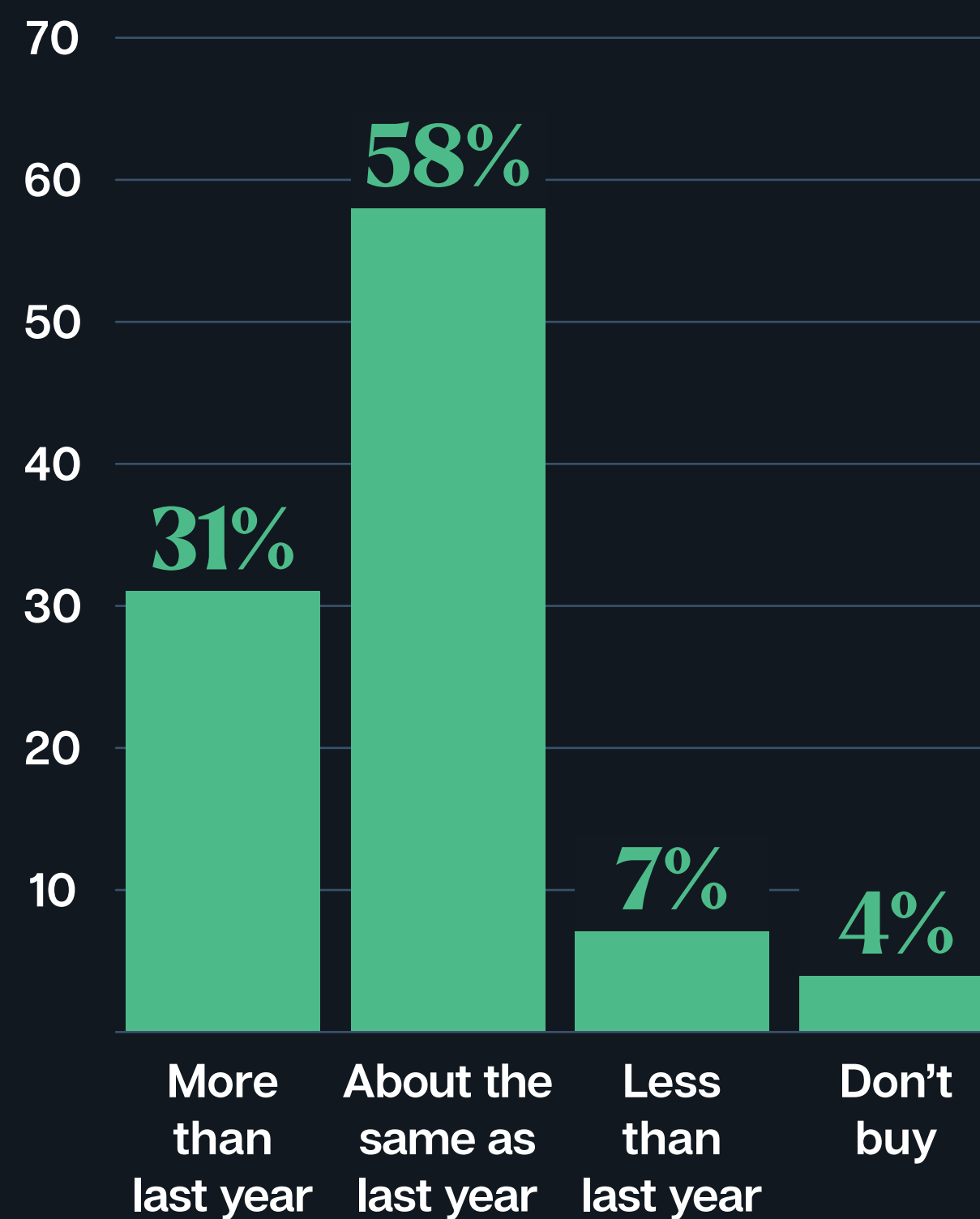
BY GEORGE HAJJAR

More often the state of the economy is shifting consumers to a value-oriented model, one that prioritizes cheaper national brands, private label, and products that offer a compelling proposition related to quality or other factors such as social/environmental impact or special diet need.

The difference now, is that everyone is engaging in these behaviors, not just the lower- or middle-income consumers as in earlier years.

"If you go into an Aldi today, you'll see quite a few Mercedes," quipped Danny Edsall, principal and global

Consumers Are Buying Private Label Groceries More Often



Source: Ipsos Consumer Tracker. Fielded August 26-August 27, 2025 Among 1085 U.S. Adults. Shared at Groceryshop 2025.



Americans Say Prices Are Higher On Many Grocery Items

78%
Your total grocery bill

72%
Meat

65%
Fresh fruit and vegetables

61%
Dairy

grocery leader for Deloitte during a conversation about the new consumer need state at Groceryshop 2025.

Aldi’s private label portfolio and consistent lower-priced model have made it an attractive channel for the shopper on its journey, plus it features an assortment of innovative items that can further take market share away from other players.

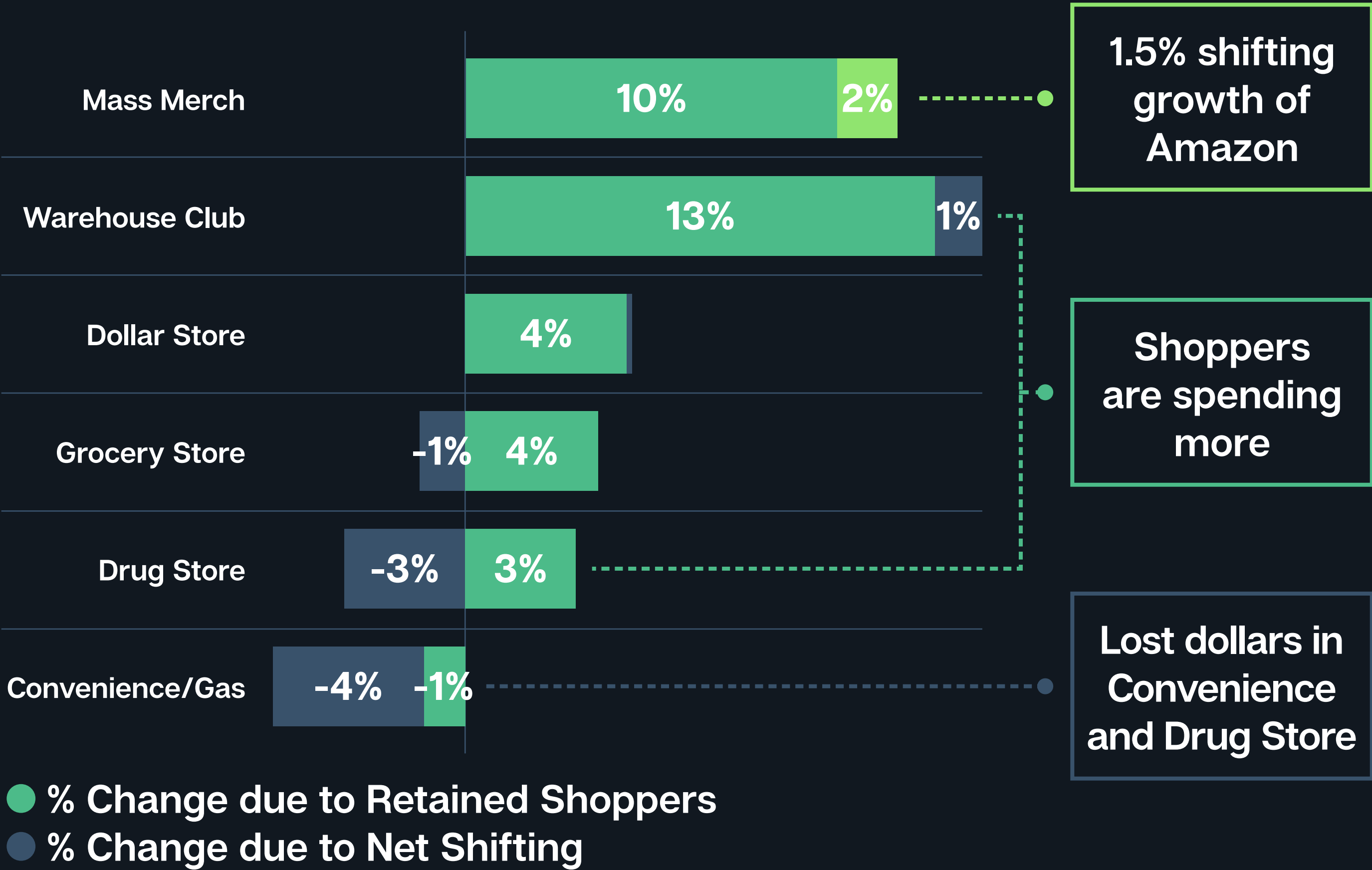
David Gray, CEO at FedUp Foods noted that, in 2026, private label will continue to evolve into the innovation space. As a result, retailers are investing in their own brands while also turning to partners to launch products that hit target need states, especially around clean label, macronutrient needs, and third-party credentials.

Also facilitating this growth is artificial intelligence tools that can effectively simulate market environments, test, and iterate innovations in flavor, packaging, and dissemination. HungerRush CEO Bill Mitchell noted that technology will be the standout differentiator for operators engaging with price-conscious and service-sensitive consumers, as it has the potential to enable them to balance efficiency and customer experience.

Concurrently, the definition of value has changed to a more holistic term that can be the key for grocers and CPGs to unlock growth for the value-focused consumer without sacrificing already razor-thin margins.

Edsall’s solution: considering the price, product, freshness, convenience, and experience as necessary touchpoints in the consumer journey.

Share of Wallet is Shifting: Retailers Compete for a Slice of the Pie



Source: NIQ

“Getting the mix right is the alchemy of value. If you get that right, you turn lead into gold,” he said.

Another solution retailers can consider involves improving the grocery shopping experience with loyalty programs.

In conversation with Edsall, Ryan Draude, head of loyalty and digital at Giant Food, noted that shoppers are “promiscuous,” citing the fact that channel switching (between traditional, mass, discount, etc.) is becoming more common. As a result, retailers need to think about the incremental purchase, rather than converting these shoppers to “fully committed” leads. His key?: “We try to elevate a customer to an emotional level of loyalty” by tying their needs into values shown on the loyalty app. Some tactics include discounts on healthy foods and the ability to earn points when shopping with membership.

Many of these techniques extend to foodservice, where value is equally considered; however, the problem is more difficult in the channel as a result of the historic gap between food-away-from-home and food-at-home inflation.

One of the latest operators exploring new promotions for these shoppers include IHOP, which debuted its first-ever value on Sept. 15. In 2026, foodservice will continue to invest in these strategies to ensure same-store visits remain consistent or even grow both in-store and through delivery apps. ●

Value Seeking Appears To Be On An Upward Yet Volatile Trend

U.S. value-seeking prevalence

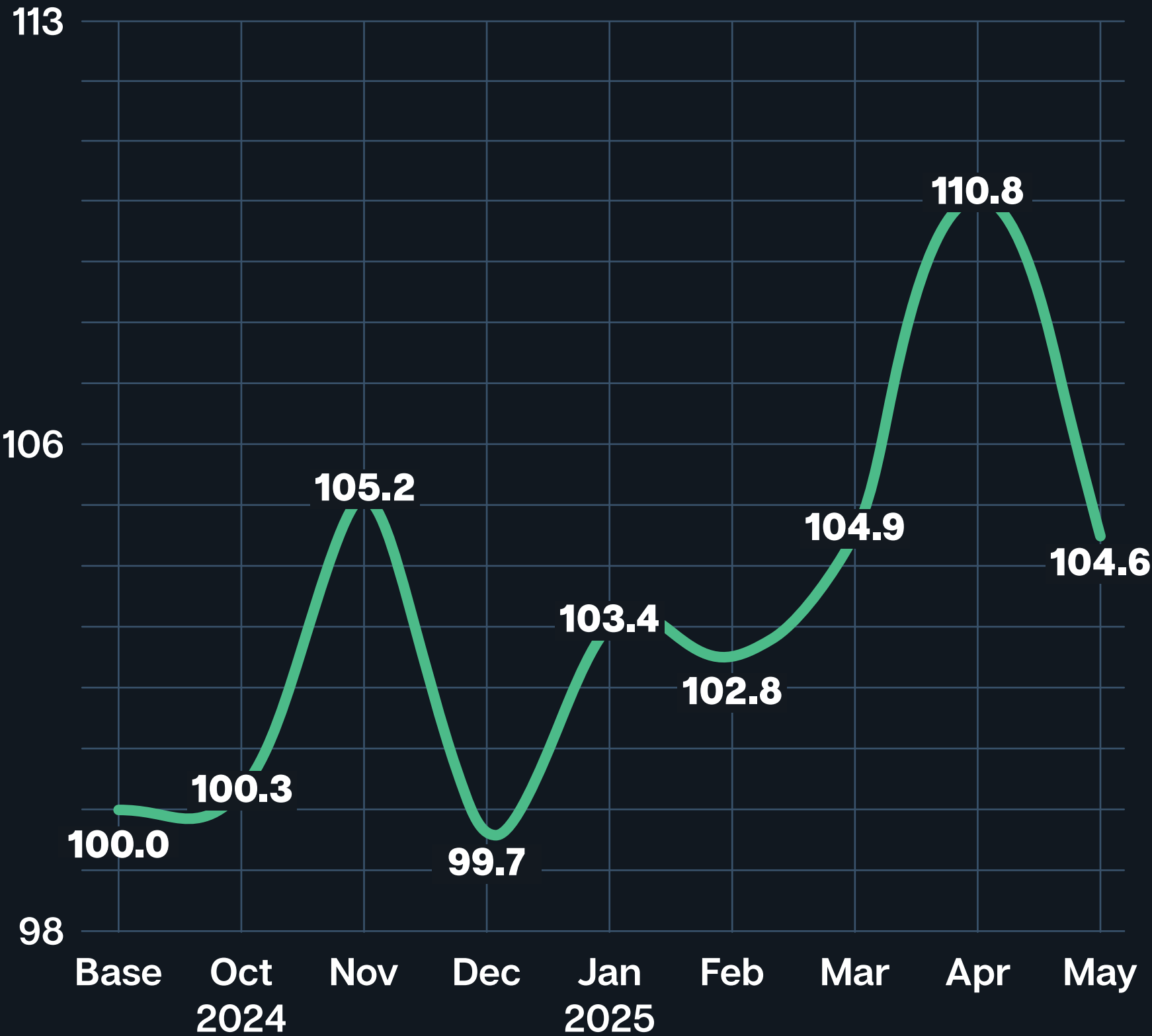


4 in 10
U.S. consumers
are value seekers



Value seekers make more cost-conscious choices, deal-driven purchases, and convenience sacrifices.

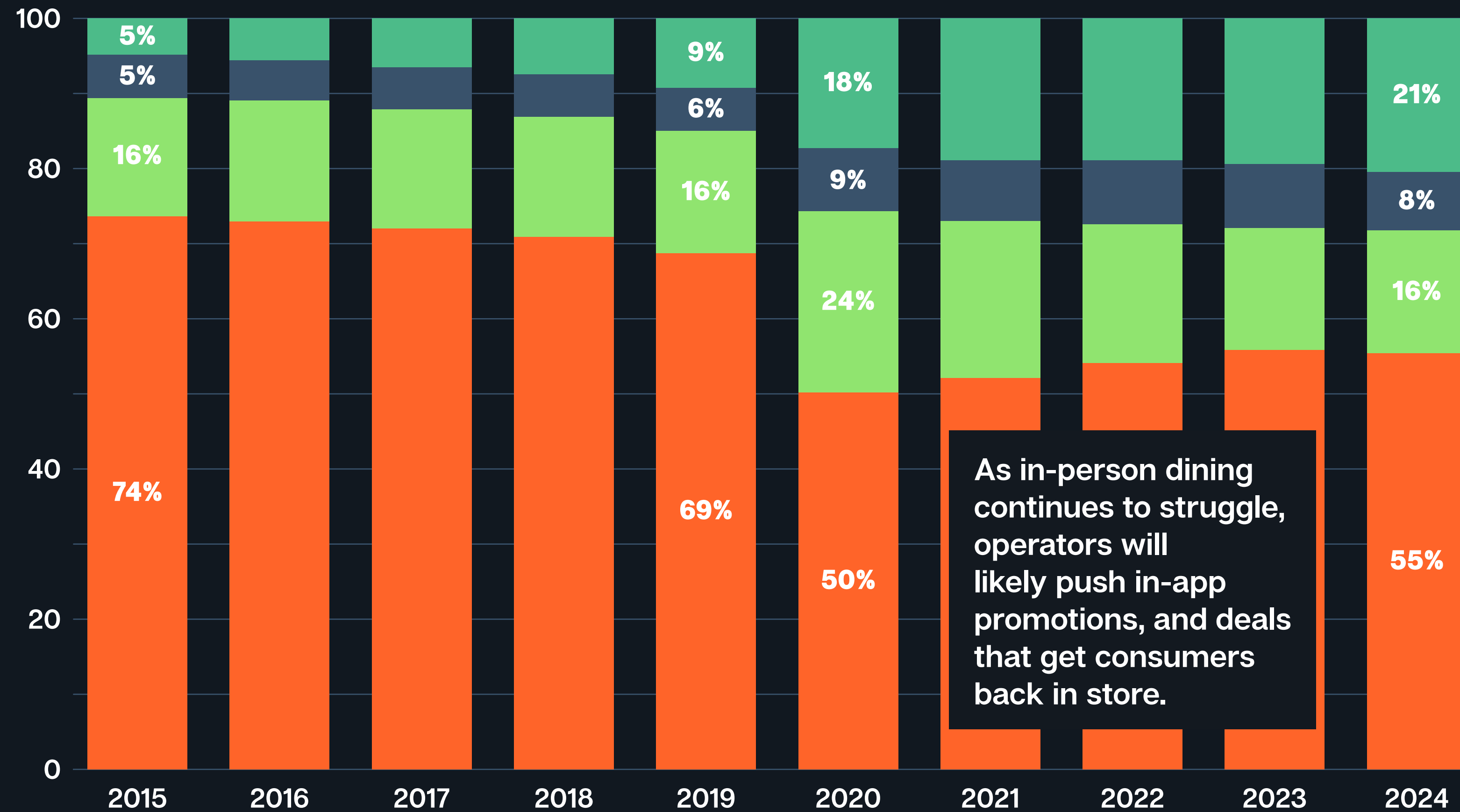
U.S. consumer value-seeking index



Source: [Deloitte](#)

Global Spend On Foodservice Categories

PERCENT OF TOTAL



As in-person dining continues to struggle, operators will likely push in-app promotions, and deals that get consumers back in store.

CAGR

2019-2024

19%

● Delivery

7%

● Drive-through

1%

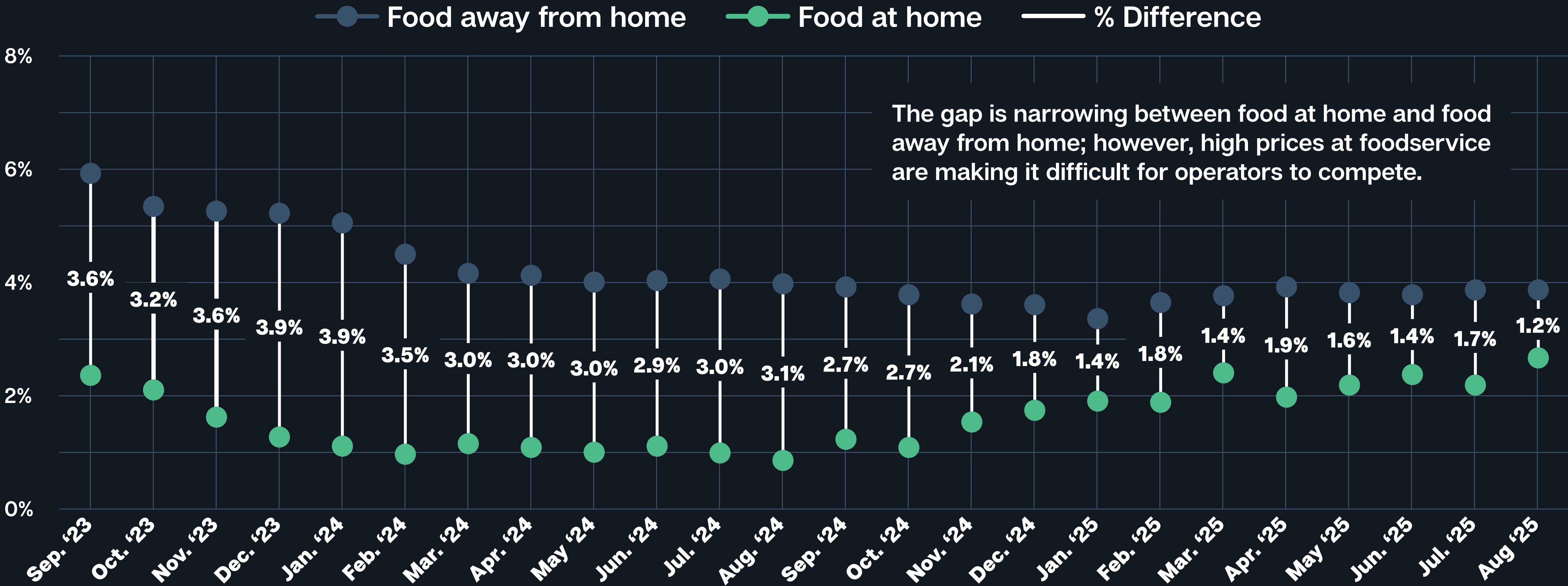
● Takeaway

-3%

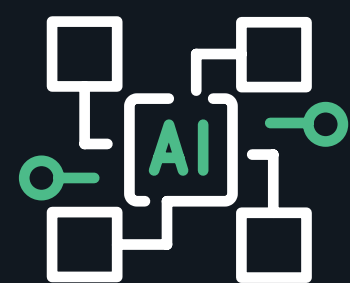
● In-person Dining

Consumer Price Index Year-Over-Year Gap

FOOD AWAY FROM HOME VS FOOD AT HOME



Source: The Food Institute Analysis of Bureau of Labor Statistics Data



AI—An Operators Best Friend

BY GEORGE HAJJAR

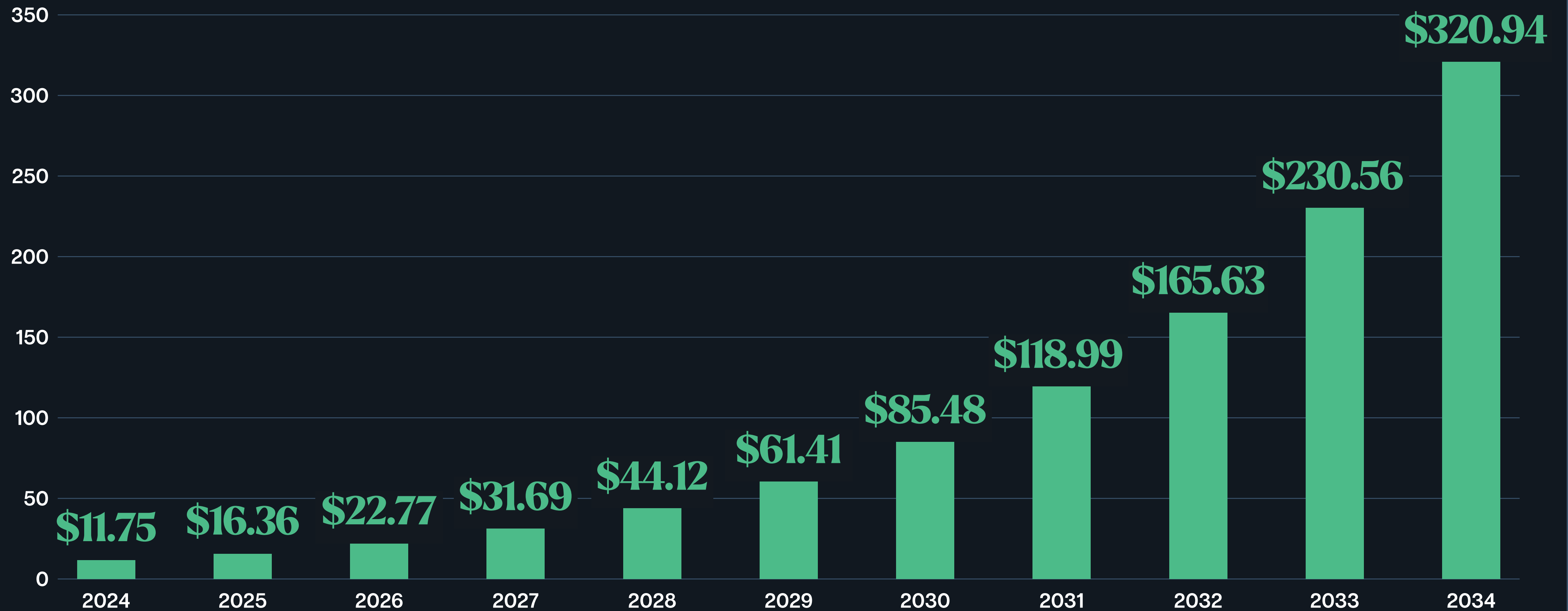
In the new food and beverage environment, innovations to artificial intelligence will give brands able to adapt the upper hand in 2026.

Some of these changes border on dystopian. Tarun Chandrasekhar, chief product officer at Syndigo, for example, told *FI* that AI will decide what people will eat, referencing the potential that GenAI tools holds in facilitating food decisions.



AI in Food & Beverage

MARKET SHARE 2024-2034 USD BILLION



Source: Precedence Research

“By 2026, generative AI will act as the digital shelf itself, steering what lands in a consumer’s basket,” he said.

He warned businesses to ensure websites and product pages are AI-ready, urging businesses to invest in generative engine optimization (GEO), which experts are calling the successor to search engine optimization (SEO).

On shelf, Chandrasekhar noted that electronic shelf label (ESL) technology will undergo an AI transformation that will allow retailers to change pricing strategies and get better insight into real time product visibility.

Note that lawmakers, such as U.S. Senator Elizabeth Warren, has raised [concerns](#) that ESLs may hurt the end consumer by giving grocers the ability to raise prices based on “transitory events” such as time of day and weather.

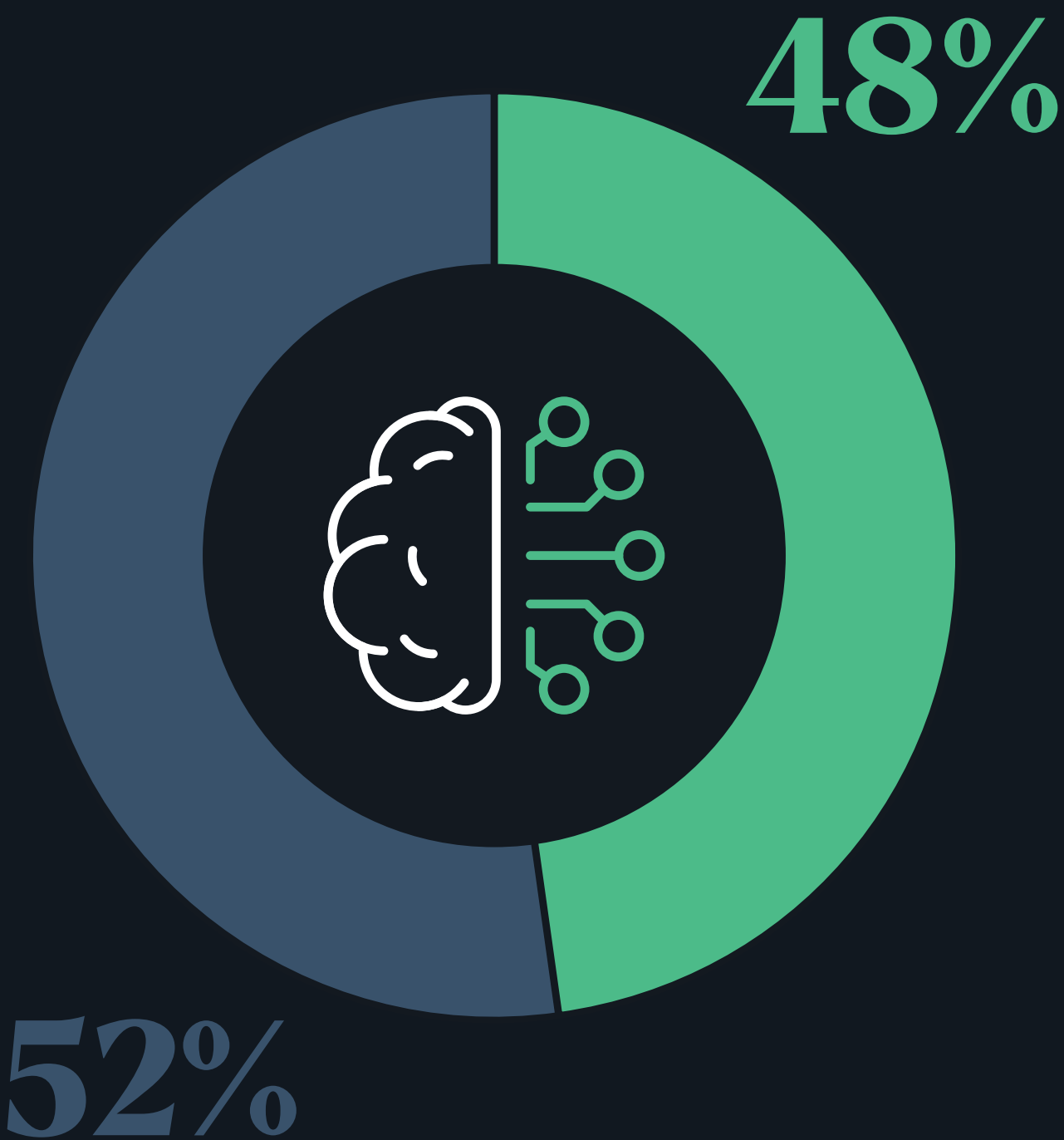
CPGs and brands will also make better use of AI capabilities for creative purposes. Colgate Palmolive chief data & analytics officer Diana Schildhouse, for example, noted that the company has built an AI engine to create products and test marketing initiatives. She spoke about emergent technologies at Groceryshop 2025 in Las Vegas.

Additionally, she noted that digital twins that simulate real market environments have become a powerful tool to prove a concept before putting it into people’s hands.

Joshua Miller, founder and principal consultant at

AI in Food & Beverage 2024 MARKET SHARE

- Hardware and Services
- Software



Source: Mordor Intelligence, Innova Market Insights

AI Powers the Future of Food and Beverage

720%
year-over-year growth in
food and beverage products
featuring AI-related claims.

40%
of global consumers believe
that AI holds significant potential
for innovation in food and
beverage products.

36%
of global consumers express
interest in using AI assistants
for food creation.

Remarkable Academic Foods, noted that already AI integration has come to many customer-facing areas with varying success.

In June, Walmart rolled out its agentic GenAI assistant named Sparky to help shoppers find items, understand reviews, and offer insights into how best to plan an occasion; however, the tool was met with varying levels of approval. Additionally, Wendy’s rolled out FreshAI drive thru ordering capabilities in May capable of speaking in Spanish and English.

Both tools represent a cultural shift to managing the customer experience journey with AI-enabled technologies.

Miller noted that, in 2026, he’s seeing that the focus will shift to back-end operations, such as scheduling, ordering, inventory management, training, menu planning, and waste management. He noted that this will create a domino effect of efficiencies that will eventually be passed down to frontline staff.

Bill Mitchel, CEO of HungerRush explained that next year’s foodservice innovations will allow operators to connect with customers at crucial touchpoints to make the consumer feel valued without having to invoke a lift in labor costs.

“When technology takes the friction out of the guest experience, it creates the space for superior service and genuine connection—and that’s what turns a good meal into a lasting relationship,” said Mitchel.

Generative AI traffic has grown substantially, rising **4,700%** in July 2025, Year-Over-Year.



Top Shopping Tasks Consumers Are Using



Source: [Adobe For Business](#)

Why AI Is the New Grocery Gatekeeper

BY KELLY BEATON

The AI revolution is reshaping how consumers shop. That's especially true in retail, as illustrated by a new [study](#) conducted by Acosta Group.

The research, which surveyed 1,074 shoppers, illustrates that AI has quickly moved from novelty to routine. Acosta Group found that 70% of shoppers have used at least one AI tool or feature to assist with shopping, with ChatGPT leading in usage. Consumers are using the technology to save money and time, and to learn about products.

“Generative AI tools are becoming the new gatekeepers of the shopper journey,” said John Carroll, president of connected commerce at Acosta Group. “Retailers and brands have to rethink and evolve how they show up in AI-powered environments, build trust with consumers, and prepare for a future where voice assistants and autonomous agents drive purchase decisions.”

One especially eye-opening finding from Acosta's research: 53% of Gen Z AI-users find generative AI more trustworthy than traditional sources.

“Our research confirms that AI is transforming the way consumers shop, and consumers are embracing AI in grocery shopping faster than in any other category,” said Kathy Risch, SVP of shopper insights and thought leadership at Acosta Group.



Grocery leads in AI-assisted shopping, with 36% of shoppers having used an AI tool to help with tasks like researching and buying; 28% of respondents have used AI to shop for health and wellness products, 27% for electronics.

How Food Brands Can Climb the AI Ladder

Retailers must carefully strategize to work their way to the top of searches on platforms like ChatGPT.

“Space is limited with AI shopping tools,” Carroll noted. “Shoppers are seeing only the top two to three options in their searches based on context and trust.

“Brands need to understand the new retailer algorithms and revise their marketing strategies.”

Despite extensive innovation from retailer-specific assistants such as Amazon’s Rufus, fewer than 15% of shoppers have used such tools to date, highlighting the need for retailers to bridge awareness gaps.

Even as AI gains traction, trust remains a barrier for some consumers. Approximately 60% of shoppers cite concerns over privacy related to using the rapidly evolving technology.

One [study](#) from earlier this year, conducted by SEO strategist and marketing expert Joe Youngblood, found that 26.3% of American adults now choose ChatGPT over Google searches (23.1%) when shopping online.

“AI is quickly stepping into the role of digital personal shopper,” Youngblood said. “Consumers are asking AI

for recommendations ... and many find it easier than sifting through Google’s ads.”

Youngblood’s survey also found that 75% of Americans have used AI in the past six months. ChatGPT leads overall AI usage at 46.1%, followed by Google Gemini (22.8%) and Meta AI on Facebook (19.3%).

Optimizing to Drive Conversion

These days, brands and retailers must optimize digital content across all platforms for AI-driven discovery, Carroll said.

More advice for gaining visibility in the realm of AI chatbots:

- Shift from keyword to conversation, using real language to optimize content
- Audit AI recommendations – prompt ChatGPT, Gemini, or another tool to monitor your brand presence
- Strengthen brand and retailer collaboration – share AI demand signals to refine joint forecasts

AI is ushering in a brave new world for retailers. But experts like Carroll see endless possibilities for the technology.

“In the near future, AI agents will be making at least some of our purchase decisions,” Carroll said. “The retail and brand winners will be those who build trust, show up in AI-powered environments, and make it easy for shoppers to say ‘yes.’” ●



36%
of shoppers have used AI tools for grocery tasks like researching and buying, making grocery the leader in AI-assisted shopping.

Source: [Acosta Group](#)

Member Profile

BMO Food, Consumer and Agribusiness Group

Whether you're a producer, processor, retailer, or distributor, every company throughout the food continuum needs a financial partner that understands the factors that impact their business.

From emerging consumer trends and industry consolidation to commodity fluctuations and economic cyclicalities, BMO's Food, Consumer, and Agribusiness Group understands the issues affecting your company and is dedicated to serving the entire food industry – from farm to consumer.

Brigham Young University

We believe a world yearning for hope and joy needs the graduates of Brigham Young University—disciples of Jesus Christ who are driven by love for God and His children and who are prepared to serve and lead. This preparation demands a unique university model: at BYU, belief enhances inquiry, study amplifies faith, and revelation leads to rich understanding; at BYU, helping students develop their full divine potential is central to both our teaching and our scholarship. As the flagship higher education institution of The Church of Jesus Christ of Latter-day Saints, BYU strives to be among the exceptional universities in the world and an essential university for the world.

CMC Design Build Inc.

Since 1989, CMC Design Build Inc. has been a trusted leader in engineering and construction, specializing in the design and development of food and beverage processing, cold storage, and distribution facilities. From site selection to planning, permitting, and final construction, CMC provides a single-source solution streamlining every phase of the project. We define value as the strategic balance of cost, quality, and timeline delivering results that position our clients for long-term success. This approach has earned us the trust of industry leaders like Amazon, Coca-Cola, Blount Fine Foods, KeHE, Gordon's Fine Foods and HP Hood.

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