



HATCH

FOOD & BEV REPORT 2025

STILL BRINGING HOME THE BACON?

THE IMPACT OF UPFS AND THE CLEAN-EATING TREND ON F&B BRANDS



INTRODUCTION

Consumer eating habits are changing faster than ever before. Our understanding of nutrition is evolving – more of us are focusing less on calorie counting, and instead on what’s actually in our foods.

Fuelled by influencers such as Tonic Health, terms like “ultra processed foods” (UPFs) are making their way into public consciousness, as consumers pay more attention to the ingredients list on the back of their food.

In fact, recent research shows that 19m shoppers have already abandoned UPFs, with a further 9m shoppers planning to do so.

So, what does this discussion around UPFs mean for food brands exactly? In this report, we’ll explore how and why this trend has gained momentum, with insight from experts and brands within the sector to find out if and how this trend is set to shake up the industry – and crucially, how brands need to respond to stay ahead.

HOW WE GOT HERE

The clean eating trend is not a new one; there have been many pivotal moments over recent decades that have put eating habits into the spotlight amongst consumers.

The early 2000s saw shows such as "SuperSize Me" and "Supersize vs Superskinny" hit our TV screens, showing extreme diets. However, it's fair to say the focus of consumers back then was much more around calorie-counting, than nutritional value.

This really began to change in 2013, as a result of the infamous horsemeat scandal – which created a large sense of wariness amongst consumers, as we were forced to face the reality of not always knowing exactly what's in processed food.

This was followed by the big palm oil debate, which really gained momentum around 2018. As environmentalists argued on the impact that palm oil farming has on the planet, consumers paid much closer attention to the ingredients list on the back of their products – and were shocked to see just how many of them included palm oil.

Only a couple of years later came the Covid-19 pandemic, which saw consumers paying close attention to their eating habits in a bid to improve their overall health. In fact, this impact was so great that research shows 45% of Brits self-reported a decrease in HFSS meals intake, compared with pre-pandemic levels. Further research showed a

33% increase in the consumption of fresh fruit and a 31% increase in the consumption of fresh vegetables in the UK in 2020.

Together, these cultural moments have steadily reshaped consumer priorities, shifting the focus away from simple calorie-

counting, to a much broader concern around food provenance, nutritional value, and environmental impact.

The result is a more informed and ingredient-savvy shopper, questioning not just how much they eat, but what they're really putting into their bodies.



WHAT'S DRIVING CHANGE NOW?

There are a number of factors currently driving forwards the consumer trend towards healthier eating.

Firstly, there have been numerous studies which published over recent months on the health impact of UPFs, which have gained traction in mainstream news. For example, in April 2025, a study published in the American Journal of Preventative Medicine found a clear link between consumption of UPFs and early death, and was covered widely in the likes of BBC, The Guardian, and Sky News.

Just a few weeks before, another article ran in The Guardian with the headline "Ultra-processed babies: are toddler snacks one of the great food scandals of our time?". This article highlighted how by the age of two to five, the average UK toddler is getting 61% of their energy from ultra-processed foods – higher than the US!

Alongside this constant drumbeat of news articles, is the impact of the government's HFSS legislation. The first phase came into effect in 2022 and has had a notable effect on consumer shopping behaviour by banning HFSS products from prominent store locations. Kantar has reported that this has had a "gradual yet discernible change in consumer behaviour towards healthier options", as the tide shifts towards healthier non-HFSS items. As phase 2 of HFSS is set to come into effect in only a few months' time, its impact is only sure to increase on consumer behaviours.

Another factor influencing consumer behaviour is the growth of health influencers such as Tonic Health, which combined with the factors above, seems to be having a push-pull effect with regards to healthier eating. Sunna van Kampen, the influencer behind the Tonic Health account, shares multiple posts each day on the products he finds in UK supermarkets, analysing their ingredients lists and discussing the nutritional value of each. The videos he shares with his 750k followers include advice on everything from which smoothies have the most sugar, to how to spot "fake" olive oils.

All these aspects combined mean consumers are being exposed to a steady stream of information that's challenging old habits and encouraging new behaviours. People are more alert than ever to the risks hiding in plain sight on supermarket shelves and for brands, this marks a pivotal moment which places focus not just on reformulation but on clarity, credibility and above all, consumer trust.



DO CONSUMERS REALLY UNDERSTAND THE TERM

"UPF"?

All this discussion of UPFs, both on social media as well as in the news, is undoubtedly driving greater awareness over how products are made. Yet despite this, there still seems to exist some confusion amongst consumers around what exactly constitutes a UPF, given that so many products undergo some form of processing during their manufacturing.

In fact, recent research reveals that over three quarters (78%) of Brits are aware of UPFs, yet only 57% said they know what they are.

It's something that Sophie Wright, head of food at Cherrypick, the meal planning and shopping app, is seeing. She explains: "Most of our users have heard the term "UPF", but understanding is still shallow or inconsistent. People often associate it only with "junk food" or E-numbers, without realising that many everyday items - like protein bars or certain cereals - also fall into this category."

ULTRA-PROCESSED FOOD



"We believe there is a broad misunderstanding of UPFs. The term often gets a negative connotation because it groups together a wide variety of foods, some of which are indeed unhealthy, while others, like plant-based meat alternatives, are designed to be nutritious and beneficial.

"This misunderstanding has likely arisen from generalised media narratives and a lack of distinction between different types of UPFs."

DAN AVERY, APPLICATION MANAGER
PLANT-BASED FOOD BRAND, THIS

PROCESSING VS INGREDIENTS – WHICH MATTERS MORE?



On top of the debate around what actually is a UPF, there is further confusion around the debate of which is more important: a product's ingredients or its processing.

Rhys Williams, international sales and marketing manager at chickpea snack brand, Hippeas, explains: "I don't think the majority of consumers have a clear understanding of what UPFs actually are, yet they display a strong feeling towards eliminating UPFs from their diet. I think the first place consumers look is the ingredients list."

Will Ainslie, Community and Content Manager at gut happy snacking brand, Boundless, tells a similar story: "The term 'UPF' is definitely gaining traction, but most consumers are still working out what it really means. Some people assume it's just about additives or artificial ingredients, others think anything in a bag is ultra-processed. Right now, ingredients still lead. People look for things they recognise on the back of pack – they want natural, simple ingredients and fibre is having a real moment."

What's clear is that consumers are paying closer attention than ever, and doing so with a growing sense of wariness. While they may not fully understand the technical definition of ultra-processing, they're increasingly scrutinising what goes into their food and how it's made.

So, how are brands responding to this heightened consumer scrutiny, and navigating the minefield that is UPFs?



HEAR IT FROM THE EXPERTS

"Example point being M&S cereals with five ingredients getting a load of traction and hype without much attention to the actual processing to produce a 'hoop'. For a consumer, looking at the ingredients decks is easy, can be done in store and is easy to understand. It's not often you see processing methods communicated on pack!"

RHYS WILLIAMS
INTERNATIONAL SALES AND MARKETING MANAGER

organic chickpea puffs
HIPPEAS



HOW IS THE TREND IMPACTING THE F&B INDUSTRY?

In June this year, soup brand Campbell's released data that showed the number of people cooking at home has hit the highest level since the Covid-19 pandemic – a trend which coincides with heightened debate around UPFs.

Further YouGov data shows:

23% of UK residents now cook from scratch most days. Within this, pasta sauces are most common, with nearly half saying they make them from scratch, followed by home baking while pizza ranks third, with 26% regularly making dough and sauce from scratch.

It's something that Sophie Wright at Cherrypick is recognising too: "It's definitely starting to influence habits, especially among health-conscious shoppers. Cherrypick users, for example, cut their UPF consumption by 26% on average. And the percentage of UPFs in their grocery baskets is 28.7%, about half the UK national average of 57%.

"These shifts suggest that when consumers are given the tools to understand and identify UPFs, they respond in meaningful, sustainable ways. They don't just react to headlines; they take action by cooking from scratch on a daily basis, allowing for treats and quick alternatives when time is not on their side."

It's easy to see why this has come about; cooking from scratch is one of the very few ways for consumers to take back control of knowing exactly what goes into their food. Therefore, this rise in home cooking is likely to be more than just a passing trend - it's a response to the growing distrust around what's in our food.

For brands, this marks a clear opportunity to bolster not only sales, but long-term trust, either through NPD, considered brand partnerships, or simply creating useful, inspiring content for shoppers.

NPD & TECHNOLOGY INNOVATIONS



As consumers demand cleaner, additive-free products, brands are already responding with innovative NPD which will tick both the health and taste boxes for consumers.

One example is new dairy brand, SuperNutrio, a new, high-protein, high-calcium milk, but made with only 100% cow's milk. The product is the result of a unique technology innovation; rather than adding whey into the milk to increase the protein value (and by default, a number of other additives which are then needed to mask its flavour), the brand has developed a patent-pending technology in which it filters two litres of cow's milk into one.

The result is a one-ingredient, zero-additives milk, yet providing up to double the nutritional value. The product certainly seems to have been received well, with high profile listings in the likes of Sainsbury's, Asda and Tesco, and organic endorsement from health influencer Tonic Health.

Another example of NPD is from THIS, with the launch of its new meat-alternative range of 'Super Superfoods', which features plenty of wholefoods on its ingredients list. Explaining the reasoning behind the launch, Dan Avery explains: "We acknowledge the demand for less processed options using more natural and recognisable ingredients. These products are made up of wholefoods, such as shiitake mushrooms and a variety of seeds, and deliver on consumer demand for products high in protein and fibre."

As consumer expectations of brands continue to increase, it's no longer enough to simply remove the "bad" stuff; brands are expected to actively prove the value of what is included. Those leading the way are rethinking not just ingredients, but the entire production process.

NEW NON-UPF CERTIFICATION?



As consumers try to navigate the minefield that is UPFs, brands that succeed will be ones that are able to showcase their non-UPF products quickly and clearly to shoppers.

This year, we've seen the launch of the first ever competition to champion food and drinks which are free from artificial ingredients and ultra-processing.

The NatureMade Food & Drink Awards aim to set a new benchmark in the industry, with its founder Pip Martin explaining that the awards are designed to "not only celebrate brands that prioritise natural ingredients and sustainability but also help drive meaningful conversations around the future of food and drink production".

With recognised awards and certifications such as the Great Taste Awards and the MTick, perhaps it's only a matter of time before we begin to see non-UPF foods featuring a new certification on their packaging.

While the clean eating trend poses many opportunities for brands, it also poses serious risks.

Food additives are a subject that frequently crop up in any discussion around UPFs, given that UPFs are often defined by their high proportion of additives and processed ingredients. As consumers become savvy to this link, they are paying greater attention to any additives used in the production of their foods – a trend which, at the end of 2024, saw Arla face huge backlash around its trial of a methane-suppressing cow feed additive called Bovaer.

The brand embarked upon the trial in a bid to reduce the environmental impact of its cattle farming, claiming the additive reduces cow methane emissions by between 30-45%. However, consumers took to social media to raise concerns about the health implications for humans consuming dairy products produced by these cows.



The basis of the concerns focused on a report by the Food Safety Agency in 2023, which claimed Bovaer is corrosive to the eyes, a skin irritant, and potentially harmful by inhalation to humans handling it. And while experts emphasised that Bovaer is broken down in a cow's stomach, and therefore no traces of the additive would be found in milk or other produce, consumer scepticism remained, and soon there were videos of people pouring their Arla milk down the sink, amid calls for a boycott.

Interestingly, Arla reported in February of this year that the long-term financial fallout had been "marginal", however the crisis remains a lesson for all FMCG marketers on the risk that misinformation can pose to a brand's reputation, especially when it comes to the topic of UPFs and additives. With the buzzwords being a hot topic both online and in the press, combined with a general lack of consumer understanding of what it actually means, the potential for damaging misinformation is huge.



HOW DO BRANDS NEED TO RESPOND?

Sophie Wright from Cherrypick puts it plainly: "We think the conversation around UPFs is just getting started. As public understanding deepens and more research emerges, there will be growing demand for products that are not just "clean label," but genuinely less processed. This could drive big changes in how food is developed, labelled, and marketed."

Brands now face a clear opportunity, and those who meet this moment with transparency, education and innovation will be best placed to build trust, loyalty and long-term growth.



GENUINE INNOVATION

As the UPF debate continues, it's becoming clear that surface-level tweaks, such as removing a single additive or swapping one ingredient for another, won't suffice. What's emerging instead is a new wave of genuine innovation: products that don't just remove the "bad," but rethink how food is made from the ground up.

This isn't about compromise. In fact, the most exciting developments are coming from brands that are finding smarter ways to deliver both health and taste, without relying on shortcuts or synthetic fixes. We're seeing investment in new technologies that concentrate nutrition without the need for additives, and product development pipelines that prioritise wholefood-led formulations.

It requires a shift in mindset from brands, from 'cleaning up' existing products to completely reimagining them.

A NEED FOR STORYTELLING

With consumers being more attune to UPFs and seeking greater information, the stories behind products are becoming just as important as the products themselves.

Will Ainslie from Boundless explains: "The average person isn't rewriting their shopping list just yet, but they're definitely pausing more and reading labels. For us, it means consumers are more interested in the "why" behind the snack - why is it better? What's actually in it? From a marketing perspective, ultimately we are a snack and anything made into something, has to go through a process, so we're not shouting about being "non-UPF," but we're showing our cards: clean natural ingredients, honest processes, and benefits that matter.

"We're not jumping on the fear bandwagon. Instead, we focus on education through good storytelling. What's gut health? Why does fibre matter? What does "activated" even mean? We talk about what we do, not just what we don't. And we let our community do a lot of the talking - they're great at sharing the real-life wins."

As the noise around ingredients and processing continues to grow, storytelling will surely establish itself as a vital tool for companies to foster brand love and loyalty amongst consumers, so that shoppers trust that their products will always be aligned with their needs and wants. Whether this story is told through compelling social content or through targeted PR, the key will be in showing, not just telling, what the brand stands for.

On social media, this could mean anything from behind-the-scenes footage of sourcing and manufacturing to user-generated content that reinforces transparency. Through PR, brands can leverage thought leadership opportunities and founder interviews to humanise the brand's values and position itself as a leader in the UPF conversation. Ultimately, brands that succeed are ones that ensure both channels work together to consistently reinforce a credible, values-led brand story that consumers can relate to and rally behind.



PROVIDING EDUCATION TO CONSUMERS

In the midst of anxiety and confusion around UPFs, consumers are hungry for guidance. While awareness is growing, understanding is lagging behind, and brands have a key role to play in closing that gap.

Dan Avery from THIS explains: "It's crucial to educate consumers on the differences and highlight the potential health benefits of well-formulated, responsibly produced ultra-processed foods. There are several situations where UPFs, including our plant-based meat alternatives, can be a welcomed and beneficial option.

"Not all UPFs are created equal. High sugar, fat and/or sodium foods with little to no protein or fibre, such as sugar-sweetened beverages, ice cream or confectionery, are not healthy food choices and should not be consumed regularly, regardless of the number or types of ingredients used to produce them. Many plant-based meat alternatives are designed to be a healthier option, focusing on nutritional balance; high in protein, low in saturated fat, and high in fibre.

"Education and transparency about the ingredients and nutritional value of our products are key to addressing these criticisms."

Sophie Wright from Cherrypick agrees, saying: "As a brand, we believe the response should be

calm, clear education. No scare tactics - just tools to help people make smarter, more informed decisions."

"At Cherrypick, we see a lot of curiosity, but also confusion. That's why we focus on education, breaking down what UPFs actually are in a practical, non-judgmental way. Once people understand the link between ultra-processing and long-term health, they're more motivated to make better choices."

It's clear that the opportunity for brands here lies not in stoking fear, but in providing calm, credible education that empowers consumers with the knowledge to make better choices, rather than simply pushing a product. From partnering with health-conscious, authentic influencers to educate on your behalf to digestible, engaging explainer content across social media platforms, there are numerous ways brands can tackle the issue of education.

On Instagram and TikTok, this might look like short-form videos that demystify ingredient labels or spotlight the nutritional benefits of certain products, while YouTube can host longer-form deep dives and Q&As with brand founders or dietitians. From a PR perspective, this messaging and education can be amplified through expert commentary in trusted media outlets, to establish credibility amongst consumers amidst the noise.





CONCLUSION

While there is still plenty of confusion over what actually constitutes an UPF, it's undeniable that the debate is nonetheless changing the way people shop, cook and eat. What began as a conversation among health experts has moved into headlines, social media feeds, and now supermarket trolleys.

For brands, this isn't just about removing additives or jumping on the latest health claim, it's about rebuilding trust. Shoppers are paying closer attention to ingredients lists, to brand values, and to the stories behind what the products. They want food that's not only good for them, but that feels good to buy.

For brands, the path forward is one of transparency, meaningful innovation, and education that empowers rather than overwhelms.



HATCH

Whet your appetite? Find out how our *SUPERCHARGED
STORYTELLING* approach can benefit your brand.

Get in touch with us at hello@hatch.group