FoodNavigator

Future Food:

How the UPF debate is reshaping consumer behaviour

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Lumina Intelligence

Presented at

fft future food-tech London | September 24-25, 2025

About the report

Future Foods: how the UPF debate is reshaping consumer behaviour is a definitive, data-led exploration of changing consumer attitudes towards health, diet, ultra-processed foods, and emerging food technologies.

Exploring the intersection of health, sustainability, and innovation, this report investigates how shifting consumer priorities are influencing product demand, brand trust, and market opportunity. The report delves into evolving definitions of healthy eating, growing scrutiny of ultra-processed foods, and the factors driving or deterring adoption of new food technologies. From functional nutrition and ingredient transparency to environmental impact and ethical considerations, this research uncovers the trends and attitudes shaping tomorrow's food industry.

This report is a collaboration between **Food Navigator** and **Lumina Intelligence**, covering 9,500 consumers across 13 countries, including the UK, USA, China, Japan, South Korea, France, Germany, Italy, Spain, Australia, India, Malaysia, and Singapore.

The report's internationally representative insights were first shared at Future Food-Tech, on 24-25 September 2025.

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Sample slides

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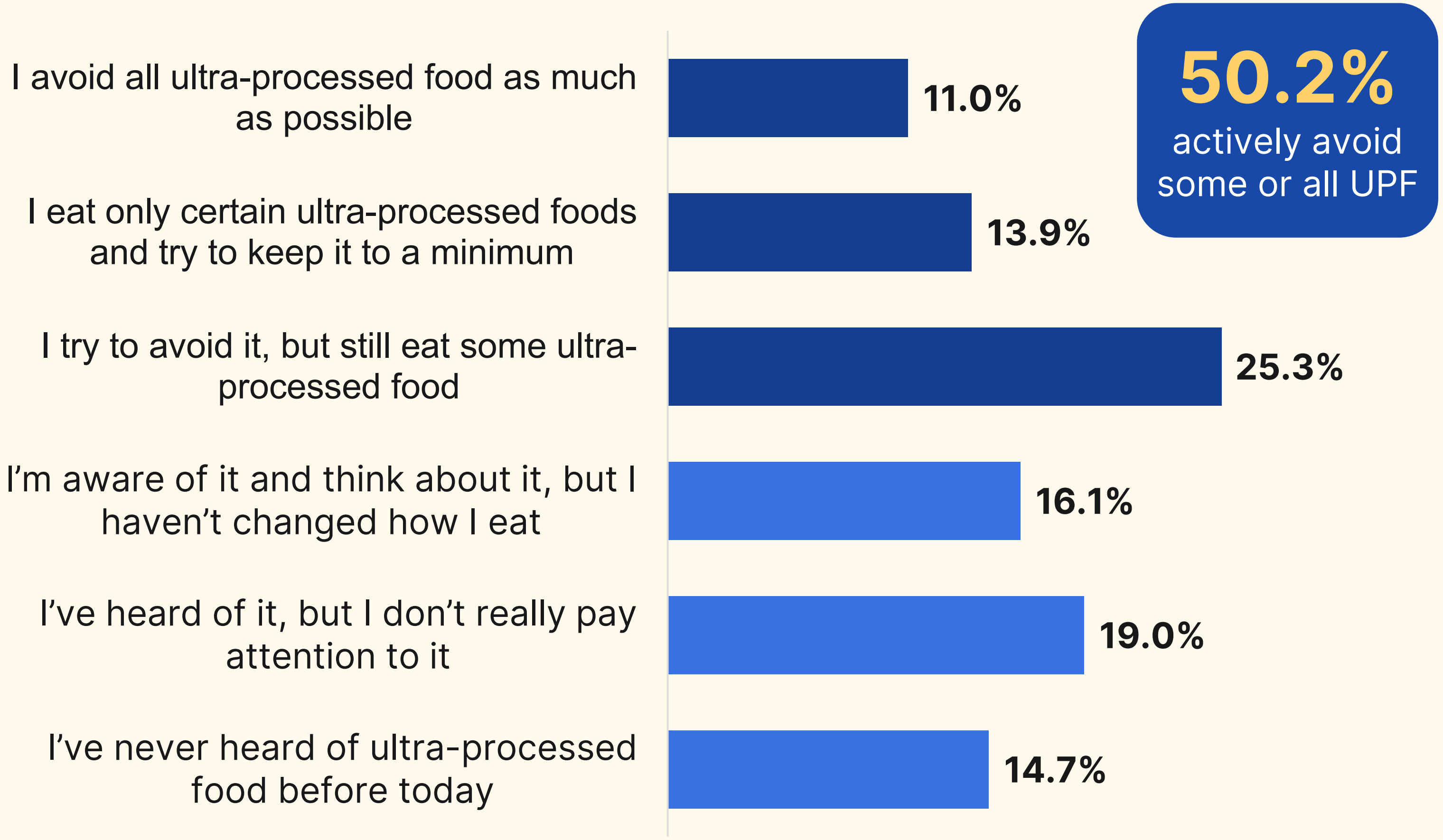
Half of global consumers try to avoid some if not all UPF

One in ten global consumers avoid all ultra processed foods, as much as possible, with a further four in ten actively avoiding at least some. This indicates the scale of the backlash against UPF and how it is becoming a household term. In fact, only 15% of consumers globally had never heard of it.

Which of the following best describes your attitude towards ultra-processed food?



Source: Lumina Intelligence & Food Navigator, Future Food Global Study September 2025

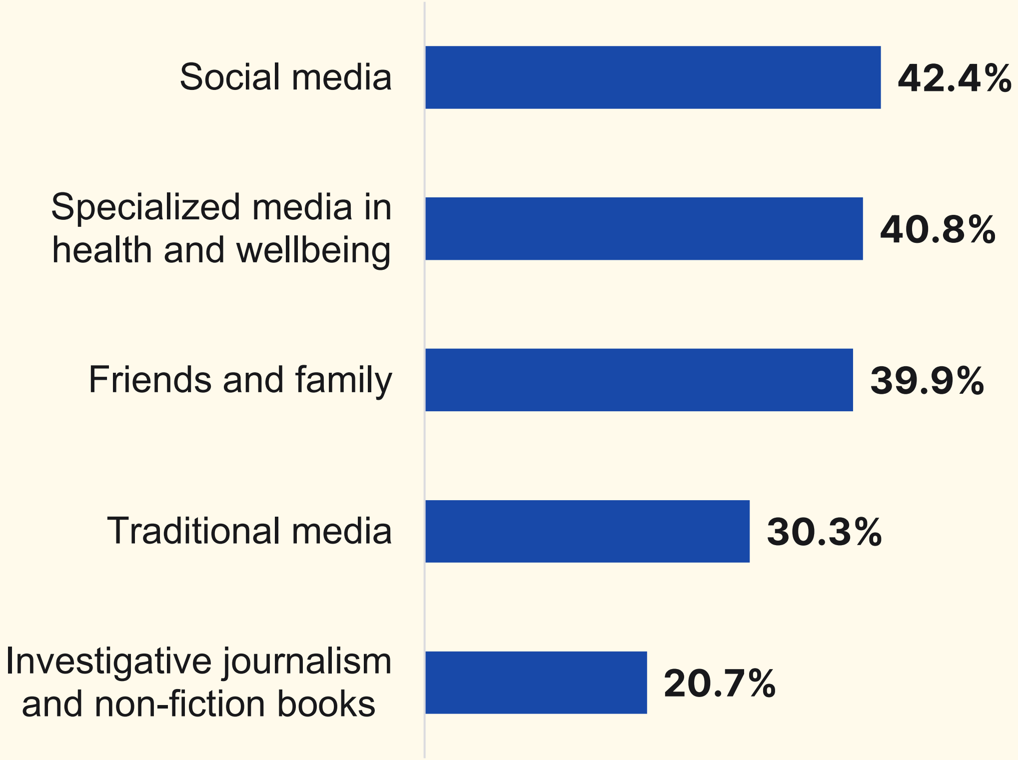
Distaste for UPF is growing fast

Over half of consumers say they now have a less favourable view on UPF than they used to, indicating the growing distaste for highly processed products and the longer-term threat to them. 43% of consumers say they have changed their views in the past year, highlighting the speed at which perceptions and behaviours are changing. Social media has been the top catalyst for change, closely followed by specialised media and friends and family.

What has influenced your change of views on UPFs?

53%
say that now, they have a less favourable view on UPF than they used to

43%
say their views on UPF have changed **in the past year**



Source: Lumina Intelligence & Food Navigator, Future Food Global Study September 2025

European countries have low interest in meat alternatives

Of the consumers who said they were unaware or aware but had not consumed meat alternatives, over half say they would not consume, and this is driven by Euoprean countries: Italy, France and Germany. Meat Alternative brands should de-prioritised these markets, due to low intent and difficulty converting consumers. Comparatively, there is greater intent in Asian markets, especially Malaysia, China and Singapore.

Top countries by intent

57%
Unaware of meat alts OR aware but have never consumed

28% don't know / not sure	**54%** probably or definitely would **not** consume	**18%** probably or definitely **would** consume

Source: Lumina Intelligence & Food Navigator, Future Food Global Study September 2025

Key Areas of Insight

Diet attitudes & health goals

Top health priorities driving consumer choices. From supporting mood and mental health to healthy ageing

People's perceptions of healthy dieting and everyday eating habits

Interest in functional ingredients including probiotics, plant-based protein, adaptogens, and collagen

Ultra-processed foods

Awareness, perceptions, and avoidance behaviours

Ingredients, labels, and claims that influence purchase decisions

When are consumers more likely to eat ultra-processed foods and how attitudes have shifted over the past year

Emerging food technologies

Awareness, perceptions, and avoidance behaviours

Ingredients, labels, and claims that influence purchase decisions

When are consumers more likely to eat ultra-processed foods and how attitudes have shifted over the past year

Consumer insight

How much more consumers are willing to pay for products labelled as minimally or not processed

The trade-offs people are prepared to make to avoid ultra-processed foods: from shorter shelf-life and higher prices to less convenience or taste

How attitudes towards value, quality, and health shape purchasing behaviour across markets.

Report details

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