

March 17, 2025

“Food is entering a credibility cycle with real financial consequences. Companies that invest now in transparency, defensible data, and claim discipline will shape relevance as scrutiny accelerates through the decade. Those decisions will determine who leads the market—and who ends up responding to standards set by someone else. This is risk management that also happens to be the next growth strategy.”



Chris Costagli
Vice President,
Thought Leadership
F&B Insights Lead,
NielsenIQ

Did you know...

- Households with children, especially those with children aged 0-12 are **1.3x more likely** to say they are extremely concerned about the use of glyphosate¹
- Parents with Gen Alpha children are **1.4x more likely** to say they would pay a premium for foods and beverages that make a “microplastic-free” claim¹
- GLP-1 using shoppers are **1.8x more likely** to be using third party scan apps regularly when shopping for FMCG products^{2*}
- Boomers are **2.0x more likely** to compare product health scores on third party scan apps before making a purchase decision^{2*}



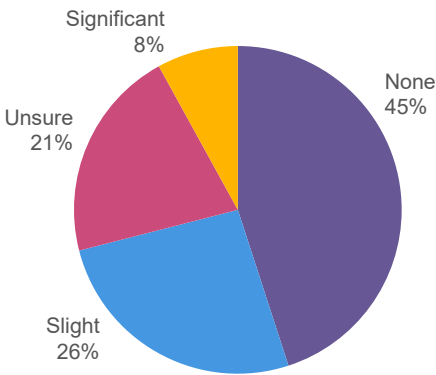
The credibility economy hits the shelf

Implications for the Food & Beverage Industry

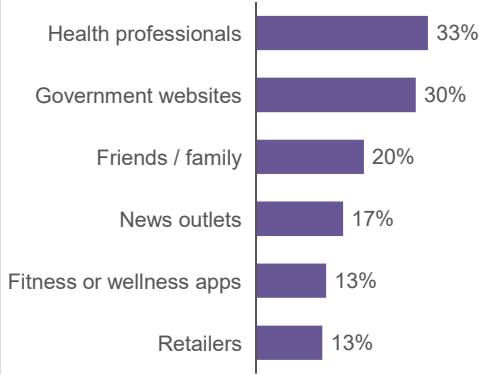
Curate shelves around guidance-aligned solutions, not just claims

Dietary guidelines are re-entering consumer decision-making, especially among younger shoppers who are more willing to change behavior when guidance evolves. When government and health professionals remain the most trusted sources, the opportunity isn't to debate guidelines but to simplify them. Brands positioned to operationalize trust stand to capture disproportionate share as consumers look for certainty in a noisy food system.

PLANNED DIET CHANGES BASED ON NEW DIETARY GUIDELINES²



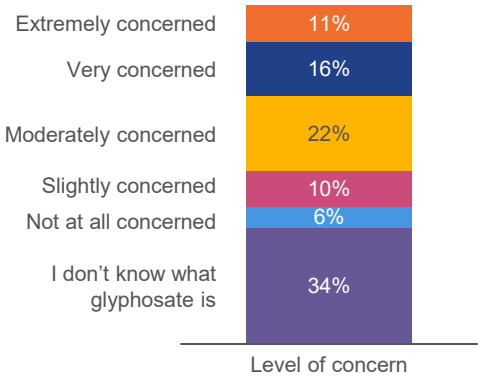
WHERE SHOPPERS ARE SEEKING NEW DIETARY GUIDELINE INFORMATION²



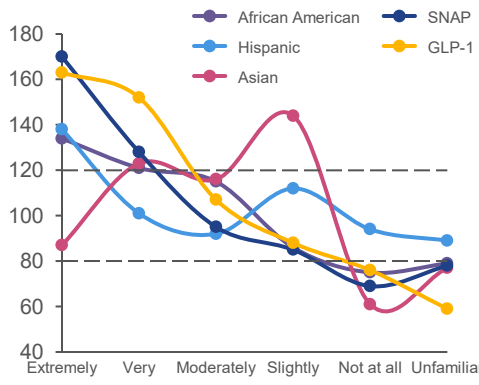
Departments without answers lose credibility

Glyphosate concern is transitioning from perception issue to portfolio risk. Risk cuts across everyday categories, not niche products. Yet “free from glyphosate” claims remain narrowly concentrated, leaving entire departments exposed. Categories without a response strategy may face disproportionate pressure as consumer scrutiny widens. Scaling reassurance will be less about marketing and more about operational readiness.

CONCERN ABOUT GLYPHOSATE USAGE IN FOOD & BEVERAGE¹



LEVEL OF CONCERN, BY DEMOGRAPHIC COHORT¹
INDEXED TO TOTAL RESPONDENTS



Industry Analysis Sources: ¹NIQ, BASES Quick Question Omnibus Survey, n=2,024, March 2026; ²NIQ, BASES Quick Question Omnibus Survey, n=1,000, May 2025 Vs. n=2,006, January 2026
Notes: *Scanning Apps include those like Yuka, Olive, etc.
Author: Chris Costagli, Vice President, Thought Leadership, Food & Beverage Insights Lead

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Perspectives

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The takeaway...

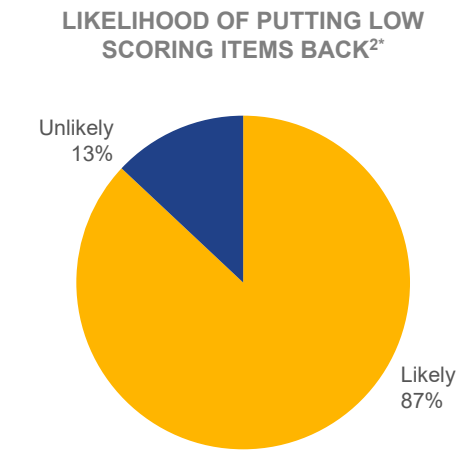
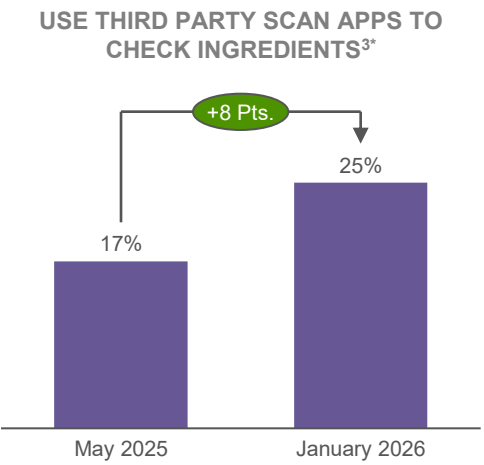
- Trust moves from a brand attribute to an operating requirement built through data, verification, and execution across the entire shopper journey.
- Retail environments—physical and digital—become the place where guidance, concern, and validation converge to shape outcomes in real time.
- Concerns that influence behavior without dominating decisions reshape share long before the industry recognizes the shift.

Your next move...

- Design the shelf to translate guidance, concern, and verification into simple choices. Retailers that provide clarity will capture loyalty, basket confidence, and repeat trips.
- Develop defensible evidence on high-scrutiny topics—glyphosate, microplastics, processing—before awareness forces the issue. Early preparation preserves optionality; late reaction limits what brands can do.
- Operate as if every SKU will be challenged by a third party, a headline, or a scoring system. Build internal standards that exceed what consumers ask for today, not what regulation requires tomorrow.

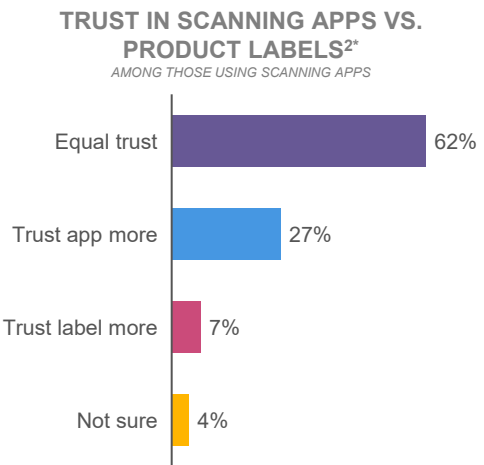
Optimize for machine-read credibility

Scanning apps are reshaping the path to purchase by inserting a third party between brand and shopper. They are an emerging gatekeeper with disproportionate influence among high-value shoppers. This behavior foreshadows a future where algorithmic approval influences sales velocity. Brands optimized for labels but invisible to apps face structural disadvantage. This shift redefines who controls credibility at shelf.



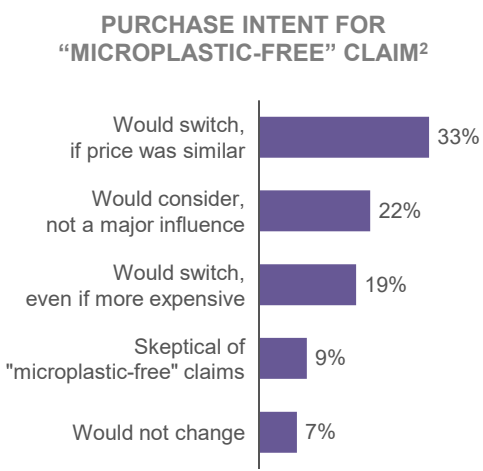
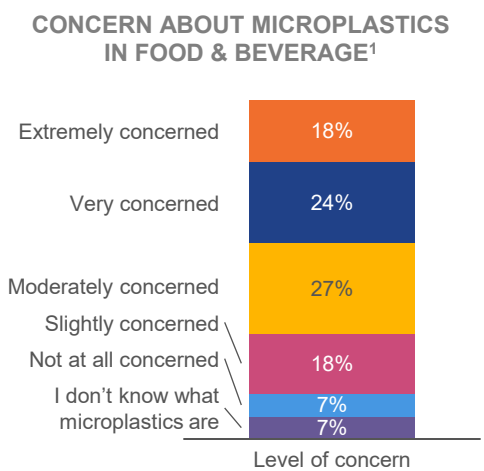
Brand trust is fractured

Only a minority use apps to avoid additives; most use them to verify facts. That distinction matters. The problem isn't ingredients—it's belief. The primary reason shoppers use scanning apps is to verify nutrition, revealing cracks beneath the surface of label trust. Trust fragmentation introduces volatility into brand performance that traditional metrics miss. Investors should watch who stabilizes credibility across segments.



Signals precede shifts

Microplastic concern influences the majority of concerned shoppers, even if few name it as their top driver. Parents are willing to pay, boomers are skeptical, and the market sits in early tension. Microplastics represent a future-dated risk with asymmetric upside for credible leaders. Microplastics mirror sustainability dynamics: influence without dominance. The path forward will reward restraint, verification, and education rather than claims.



Looking for more?

Food is entering a credibility cycle with real financial implications. Authority, transparency, and technology are converging to reshape how shoppers decide what belongs in their basket. The winners between now and 2030 will not be those with the loudest claims, but those with the clearest proof. Retailers will increasingly act as trust brokers, while manufacturers will be judged on how well their products withstand scrutiny beyond the label. This shift will quietly reallocate share, margin, and relevance across the industry.