NIQ Perspectives

Food & Beverage

April 27, 2026

"More than one third of shoppers are actively trying to increase fiber intake, and fiber-stated products continue to outperform the broader Food and Beverage industry. Growing attention to digestive health and colorectal cancer is intensifying scrutiny around fiber's role in daily diets. Whether that momentum holds will be determined by how effectively fiber becomes embedded into routine consumption."

Chris Costagli

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

Did you know…

- Gen Z consumers are **1.5x more likely** to be intentionally having more protein each day due to influencers and content creators recommending increased daily fiber consumption.[4]
- GLP-1 households are **1.4x more likely** to be actively trying to increase daily fiber intake than non-GLP-1 using households.[4]
- Younger consumers value third party certifications about fiber content on packaging, Gen Z is **1.5x more likely** to be seeking those on package, Millennials are **1.3x more likely**.[4]

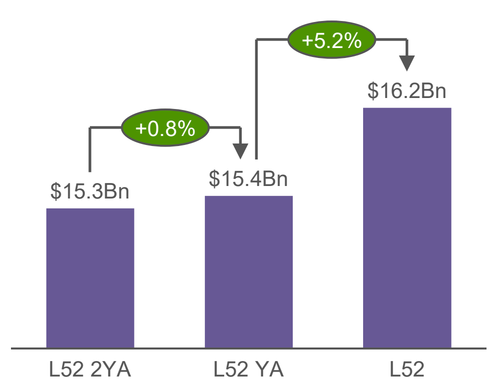
Fiber, the next scalable growth engine?

Implications for the Food & Beverage Industry

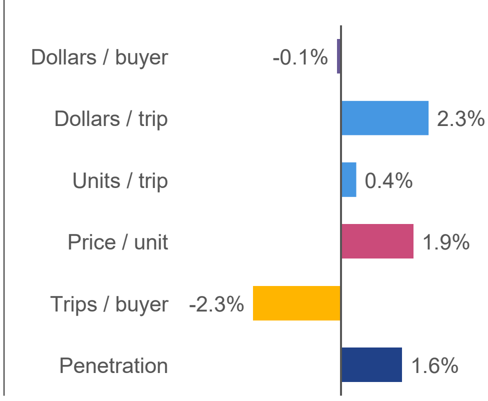
Awareness is high, frequency is the opportunity

More than one third of shoppers report actively trying to eat more fiber, reinforcing the scale of demand. Fiber has moved beyond niche positioning and now delivers sustained growth. What has not yet materialized is everyday usage, as fiber still enters baskets through deliberate health decisions. That disconnect is capping frequency and keeping fiber from earning a permanent role in everyday consumption.

STATED FIBER CLAIM SALES PERFORMANCE WITHIN F&B[1]



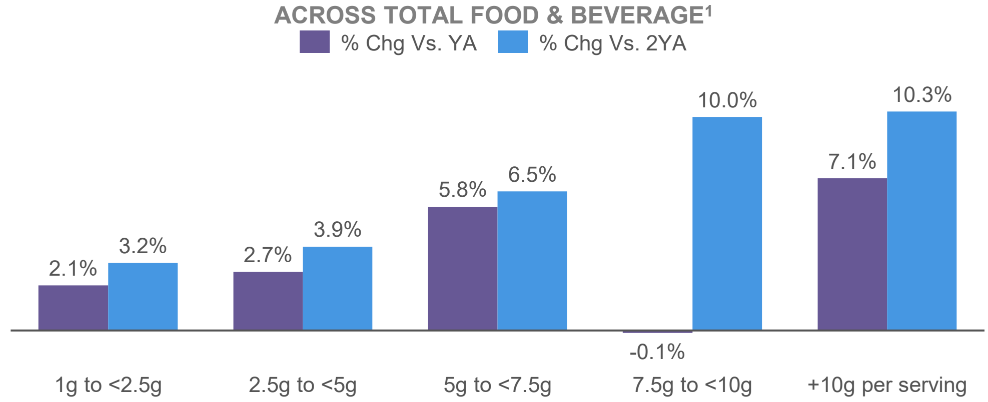
STATED FIBER CLAIM TRENDS WITHIN F&B[2]



Fiber presence is not enough

Most fiber sales still sit in low fiber tiers, with nearly all volume coming from products under five grams per serving. That part of the business delivers scale but limited momentum. Growth is increasingly concentrated in higher fiber products that offer a more substantial benefit per serving. Consumers are responding when fiber feels meaningful rather than marginal. Brands clinging to low intensity fiber are anchoring themselves to maturity.

DOLLAR PERFORMANCE BASED ON GRAMS OF FIBER PER SERVING ACROSS TOTAL FOOD & BEVERAGE[1]



Industry Analysis Sources: [1]NIQ, Retail Measurement Services, Total Full View, L52 w/e 03/21/2026; [2]NIQ, Expanded Omnishopper Panel On Demand, Total Store, Total US, L52 w/e 03/21/2026; [3]NIQ, BASES Quick Question Omnibus Survey, n=2,024, March 2026; [4]NIQ, BASES Quick Question Omnibus Survey, n=2,029, February 2026

Author: Chris Costagli, Vice President, Thought Leadership, Food & Beverage Insights Lead; Maria Camila Garnica, Full Industry Analyst

NielsenIQ

© 2026 Nielsen Consumer LLC. All Rights Reserved.

NIQ
Perspectives
Food & Beverage

The takeaway…

- Fiber is growing fast because consumers care, but it will stall if the industry continues building products faster than it is building habits.
- Most fiber strategies are quietly defending maturity under the guise of innovation, while the real growth is sitting in fewer products that actually change how often people eat them.
- Fiber is turning into a trust filter, and brands that fail to deliver real digestive comfort will lose credibility even as the category grows. it solves everyday physical friction and fits seamlessly into routine occasions, not when it's positioned as abstract wellness.

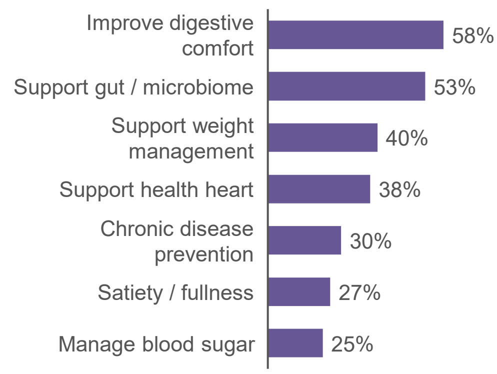
Your next move…

- Embed fiber into core, everyday trips so it shows up by default, not as a special-purpose choice.
- Reduce low-impact fiber clutter and prioritize fewer products that actually drive repeat consumption.
- Formulate fiber for daily repeatability, not maximum grams, protecting taste, texture, and tolerance.
- Shift fiber messaging toward felt digestive comfort that consumers recognize without explanation.

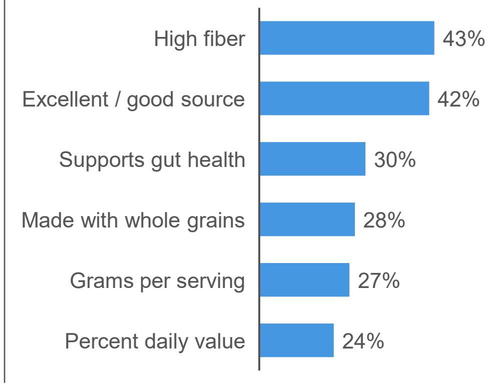
Fiber is becoming a reassurance signal

Consumers are turning to fiber less for abstract wellness and more for how it makes them feel day to day. Digestive comfort, fullness, and balance are becoming central drivers of choice for the roughly 50% of consumers who are actively trying to add more fiber to their daily diets. Fiber is evolving into an ingredient that reassures consumers they are taking care of their bodies in practical, repeatable ways.

LEADING MOTIVATORS FOR ACTIVELY INCREASING FIBER INTAKE[4]



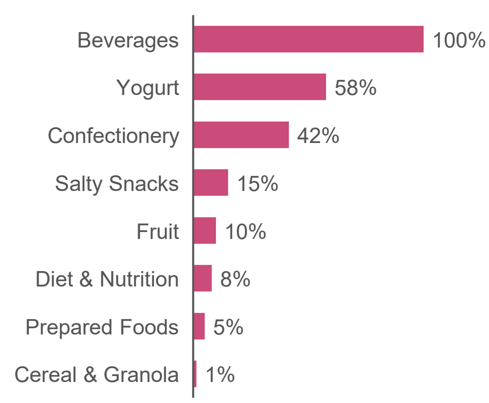
LEADING INDICATORS THAT PRODUCTS ARE GOOD FOR DIGESTIVE HEALTH[4]

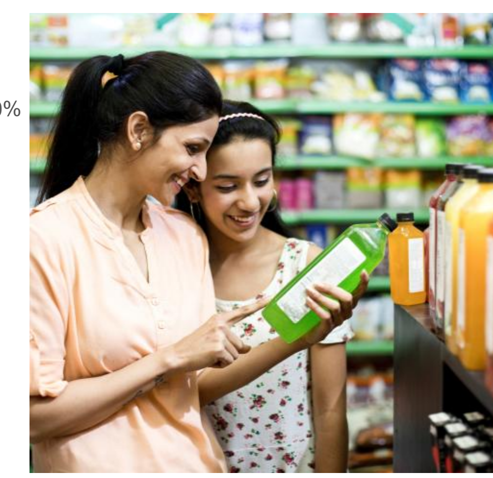


Fiber wins where health meets convenience

Growth data shows fiber performs best in categories associated with digestion, permissibility, and ease of use. Beverages & yogurt drive a disproportionate share of fiber growth by making intake feel simple and effective. Confectionery performance reinforces that fiber can succeed in unexpected places when execution is right. Expanding fiber into high-frequency categories will matter more than forcing it into nutritionally adjacent ones.

STATED FIBER CLAIM DOLLAR GROWTH VS YA[1]

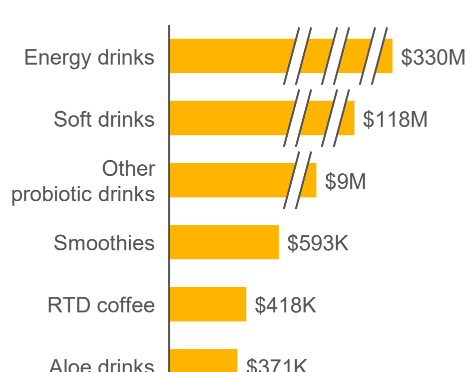




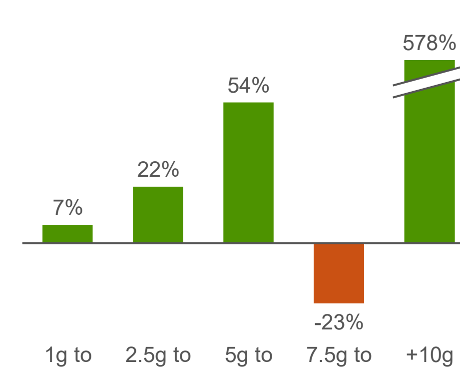
Fiber must be occasion calibrated

As consumers layer functional needs, fiber must be calibrated by use case rather than applied uniformly. High velocity categories benefit most from low to moderate fiber levels that enhance credibility without compromising performance. This approach allows brands to participate across more occasions throughout the day. Precision in formulation becomes a growth advantage.

STATED FIBER CLAIM DOLLAR GROWTH IN BEVERAGES[1]



DISTRIBUTION OF BEVERAGES WITHIN FIBER PER SERVING RANGES[1]



Looking for more?

Fiber has passed the experimentation phase and entered the execution phase. Sales momentum is sustained, yet consumption patterns remain underdeveloped. That imbalance creates long-term upside for brands that convert intent into routine. Success will favor brands that calibrate fiber by occasion, deliver clear digestive outcomes, and protect taste and tolerance.

NielsenIQ

© 2026 Nielsen Consumer LLC. All Rights Reserved.

Industry Analysis Sources: [1]NIQ, Retail Measurement Services, Total Full View, L52 w/e 03/21/2026; [2]NIQ, Expanded Omnishopper Panel On Demand, Total Store, Total US, L52 w/e 03/21/2026; [3]NIQ, BASES Quick Question Omnibus Survey, n=2,024, March 2026; [4]NIQ, BASES Quick Question Omnibus Survey, n=2,029, February 2026

Author: Chris Costagli, Vice President, Thought Leadership, Food & Beverage Insights Lead; Maria Camila Garnica, Full Industry Analyst