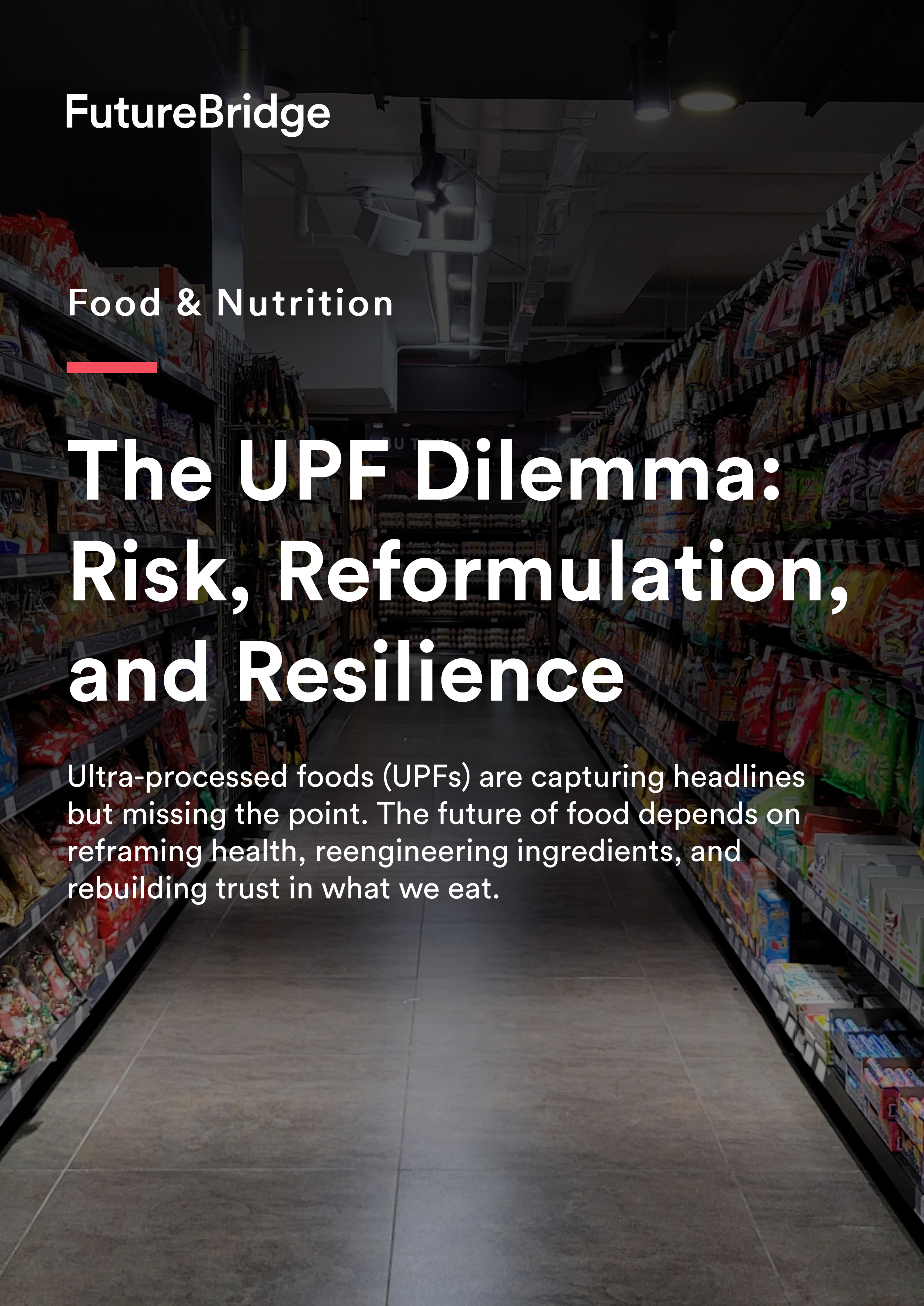

FutureBridge

Food & Nutrition

The UPF Dilemma: Risk, Reformulation, and Resilience

Ultra-processed foods (UPFs) are capturing headlines but missing the point. The future of food depends on reframing health, reengineering ingredients, and rebuilding trust in what we eat.

70%

of 300,000+ branded food products available in grocery stores are ultra-processed, according to The MAHA Report 2025

Redirecting consumer preferences away from UPFs is mountainous

Ultra-processed foods are facing growing scrutiny yet remain central to global diets. While health risks are increasingly evident, consumer demand for UPFs remains strong, forcing food manufacturers to navigate a complex balance of reformulation, regulation, and market relevance.

KEY FINDINGS

- **UPFs remain ubiquitous**: Convenience, taste, and affordability keep UPFs central to modern diets
- **Intent-action gap**: Consumers recognize health risks but rarely shift behavior – taste, price, and time-efficiency still drive decisions
- **Regulatory pressure rising**: Governments are pushing for taxes, labeling, and reformulation – signaling stricter oversight ahead
- **Reformulation challenges**: Clean-label innovations and better-for-you indulgence is gaining ground, but taste, cost, and scalability remain barriers
- **Incumbents are rebalancing portfolios**: Leading players are reformulating, adding functional benefits, and shifting to cleaner, portion-controlled options
- **Startups are redefining the category**: New entrants use advanced processing to deliver protein-rich, low-carb, clean-label alternatives

ACTION REQUIRED

1. **Reframe the UPF narrative, don't just defend processing**: Position innovation as purposeful, unlocking safety, accessibility, sustainability, and health
2. **Align pricing with perceived value**: Link cleaner formulations and functional benefits to a premium yet justified price tag
3. **Elevate nutritional value while maintaining sensorial**: Rethink format, satiety, and sensory cues to meet guilt-free indulgence demand

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1. Introduction

UPFs dominate several high-growth categories – from bakery and snacks to ready meals – driven by convenience, affordability, and shelf stability. However, their nutrient-poor profiles and reliance on high processing technologies have been linked to obesity, cardiovascular issues, metabolic disorders... and addiction.

This report explores how brands can proactively navigate rising pressure by embracing cleaner innovation, greater transparency, and responsible indulgence.

Ultra-processed foods: High in calories, low in nutrients

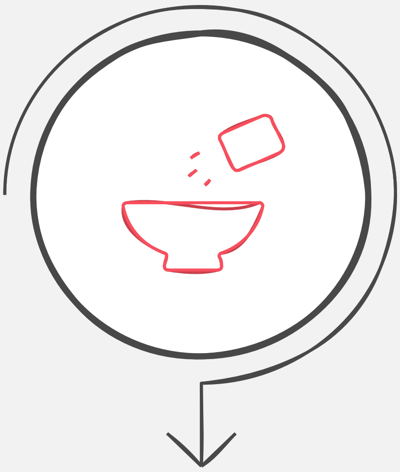
Ultra-processed foods (UPFs), defined by the NOVA system, are industrial products made mainly from refined or synthetic ingredients, with little to no whole foods. These foods are often energy-dense, nutrient-poor, and engineered for taste, convenience, and shelf life.

Unlike minimally processed foods, UPFs rely on a wide range of additives that serve functional roles in texture, shelf-life, flavor, and appearance. These ingredients, while legally approved, contribute to the perception of UPFs as being overly synthetic or “unnatural”.

Key ingredients behind ultra-processed foods

HFSS

- Refined Sugar
- High Fructose Corn Syrup
- Artificial sweeteners
- Hydrogenated Oils
- Concentrates
- Fat Replacers
- Salts
- Other preservatives



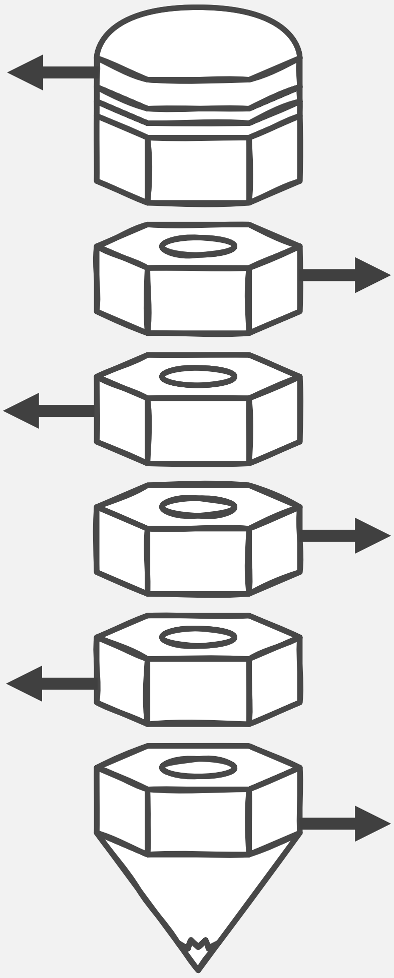
Synthetic additives

- Colorants (Red No. 3)
- Artificial Flavors (MSG)
- Emulsifiers (PEG compounds)
- Thickeners (Methylcellulose)
- Texturants (Soy protein isolate)
- Bulking Agents (Polyols)
- Binders (Alginate)
- Fortifiers (Synthetic vitamins)

Processing methods accelerate nutrient loss and quality decline

Beyond ingredients, the majority of methods that define UPFs – such as refining, high-heat processing, and hydrogenation – reduce the nutritional integrity of food. These methods strip fiber, degrade micronutrients, and increase glycemic load – contributing to overconsumption and metabolic disorders.

Mainstream production methods that make UPFs



Refining
Removes bran and germ – reducing nutrients, fibers, and minerals

High-Heat Processing
Intense heat degrades vitamins and forms trans fats

Reconstitution and Industrial Blending
Breaks whole ingredients, adds sugars, fats, and additives

Preservation
Uses excessive salt, sugar, or fat for preservation

Excessive Additive Inclusion
Masks lack of real ingredients and affects gut health

Hydrogenation
Converts oils into trans fats

Key UPF categories: Bakery, Sauces, Snacks, and Ready Meals

UPFs are deeply embedded in high-volume and high-growth food categories – baked goods, sauces and dips, ready meals, processed meats, and indulgent snacks.

Broad umbrella of UPFs

Breakfast & Grain-Based Foods
Breakfast cereals, bars, pasta, breads, baked goods, instant and packaged grain products

Ready Meals & Meal Replacements
RTE meals, convenience foods, nutritional formulas, processed and reconstituted meats

Beverages & Liquid Calories
Sweetened soft drinks, yogurts, protein shakes, flavored milk, plant-based milk

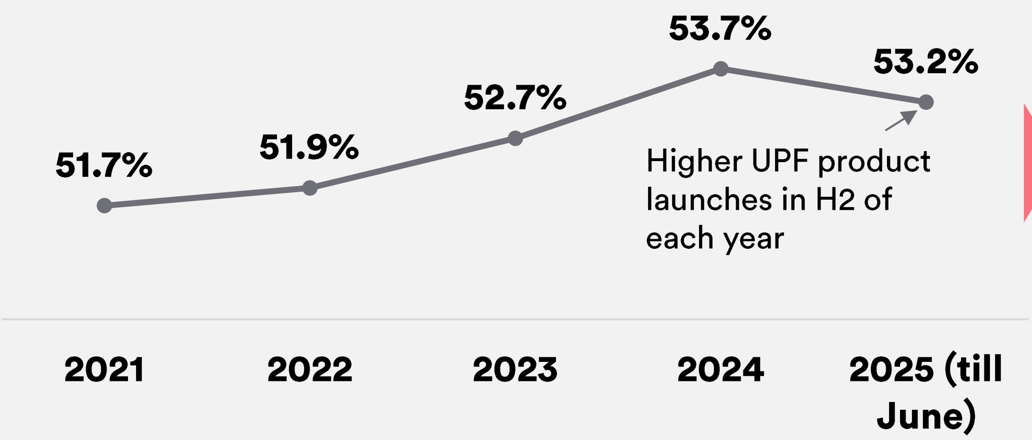
Indulgent Treats & Snacks
Sweet and savory snacks, confectionery, artificially sweetened products, processed spreads, butters, dairy-based UPFs

Add-ons & Enhancers
Sauces, dressings, condiments, cheese spreads, dips, egg replacers

Despite scrutiny, the global UPF market continues to expand

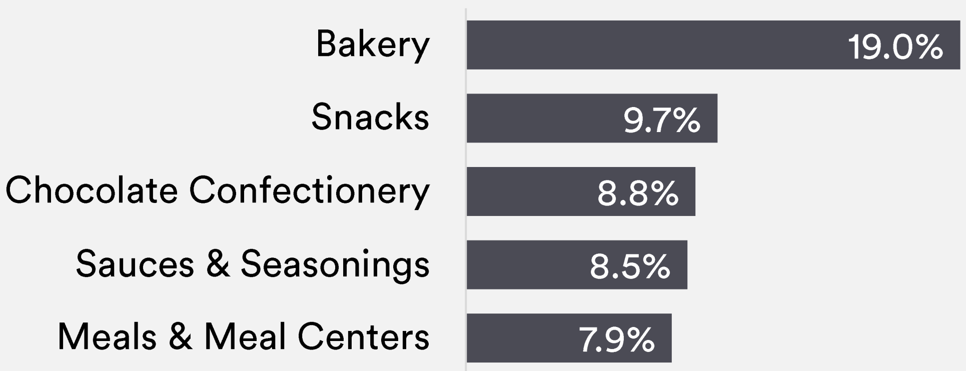
The global UPF market is expected to post ~9% CAGR over 2025–2029 to reach >USD 800 billion by 2029.
Over the last five years, bakery, snacks, chocolate confectionery, sauces & seasonings, and meals witnessed the most product launches containing ingredients associated with UPFs.

Global: UPF* Product Launches as % Share of Total Launches (2021–June 2025)



Over half of all food and drink launches are UPFs, and is continuously growing Y-o-Y

Global: Top 5 Categories by UPF* Product Launches as % Share of Total Launches (2021–June 2025)



>80% of product launches in Bakery and Chocolate Confectionery contain UPF-linked ingredients

Interestingly, more than every 3 in 4 Sports & Energy Drinks (>85%) and Nutritional Drinks (>75%) have launches with UPF ingredients

* Includes products with artificial, synthetic ingredients, white sugar, fats & oils; these charts are indicative of UPF growth but not exhaustive
Source: Mintel | PR Newswire

Health concerns mount: Obesity, metabolic disorders, and beyond

Emerging research continues to strengthen the link between UPFs and public health risks – obesity, type 2 diabetes, cardiovascular conditions, and metabolic syndromes. The concerns are aggravated by hidden additives, ambiguous labels, and a lack of consumer awareness.

1. Nutritional Imbalance

UPFs are often high in fat, sugar, and salt, but low in essential nutrients and fiber

2. Overconsumption risk

UPFs are engineered for hyper-palatability, leading to increased calorie intake and reduced satiety

3. Health Risks

UPF intake is linked to obesity, diabetes, cardiovascular issues, and other chronic non-communicable diseases in studies

4. Hidden Additives

UPFs contain preservatives, colorants, and emulsifiers which are not always disclosed by manufacturers or well understood by consumers

5. Misleading Labels

Marketing terms like “natural” or “healthy” mask high processing and poor nutrition

What If...

...UPFs are taxed as high as tobacco or alcohol

...regulators mandate front-of-pack labelling with warnings on UPFs?

...fortification is mandated across categories as a public health intervention?

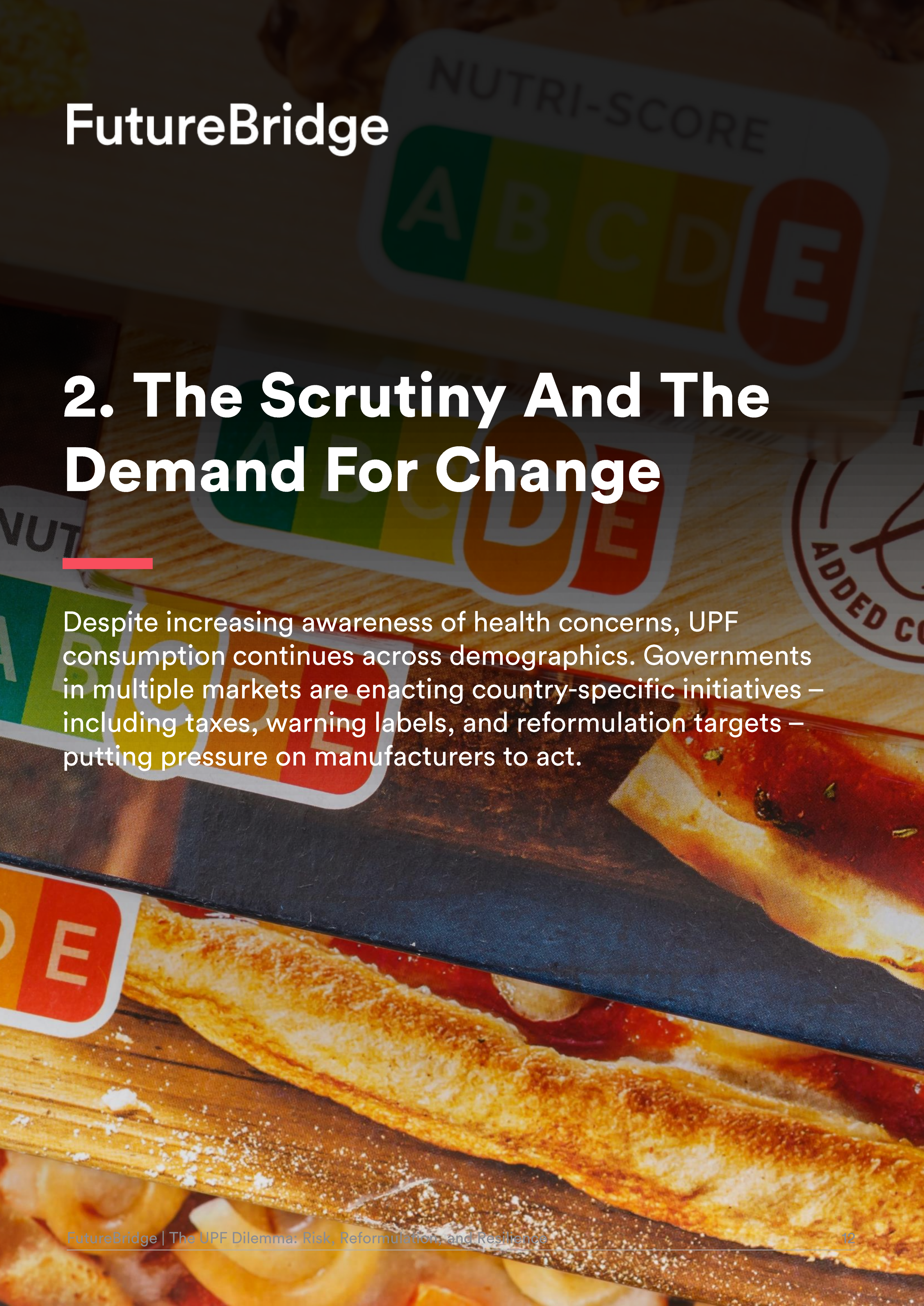
The rise of food science, urban living, and modern retail has fueled UPF growth – but the same trends are now giving rise to new expectations.

Brands must preemptively adapt, before policies, competition, or public backlash force them to.

Systemic transformation will be needed to address UPF dominance

Tackling the dominance of ultra-processed foods requires a coordinated effort across the entire food ecosystem. This means rethinking production, distribution, pricing, policy, and consumer education while balancing food security, affordability, and shelf-life needs.

In this report, we explore specifically how manufacturers can lead this agenda and play a pivotal role in transforming the food system.



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2. The Scrutiny And The Demand For Change

Despite increasing awareness of health concerns, UPF consumption continues across demographics. Governments in multiple markets are enacting country-specific initiatives – including taxes, warning labels, and reformulation targets – putting pressure on manufacturers to act.

Informed but Indulgent: Consumers still choose UPFs

Despite awareness of risks, consumers continue choosing UPFs for taste, convenience, and affordability. This paradox is a golden opportunity for food brands to decode diverse consumer motivations to unlock demand for 'better-for-you' UPF alternatives.

57%

of US adults believe UPFs are harmful

>50%

of the calories consumed at home by US adults come from UPFs

30+

health conditions linked to high UPF consumption

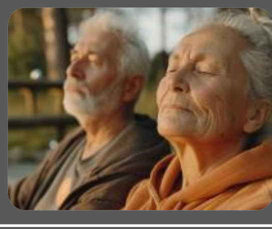
48%

increase in the likelihood of developing type 2 diabetes in high-UPF consumers

Source: BMJ | DMJ | JHU | Statista

UPF consumption cuts across demographics

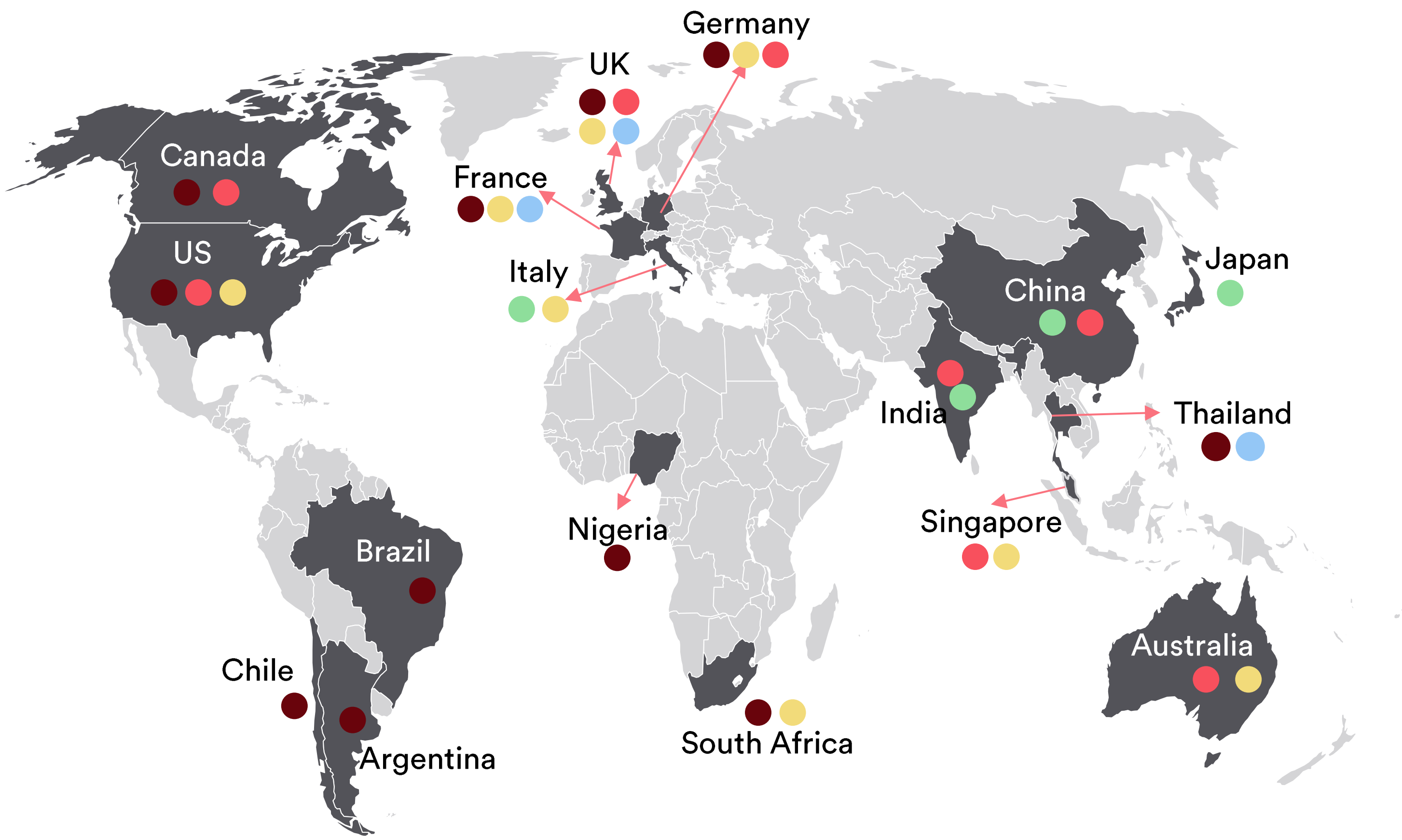
Ultra-processed foods are embedded in daily diets, driven by convenience, shelf life, affordability, and indulgent taste. The consumer base is highly diverse – ranging from convenience-first shoppers to those balancing health goals with cost and enjoyment. Understanding these varying motivations is key to shaping targeted innovation and communication strategies.

	THE EXPERIMENTAL GEN Z	THE TIME CRUNCHED MILLENNIALS	THE VALUE FOCUSED GEN X
			
Age / Profile	18–25 early career, students, trend-driven	26–40 dual-income, young families	41–55 budget-conscious
Living Setup	Students or singles, shared living	Young parents or working couples	Established, family-oriented households
Key Stat	62% snack as meal replacements (Euromonitor)	54% prioritize convenience due to time constraints (Hartman Group)	61% prefer affordable, familiar brands (IGD)
Behaviors / Drivers	Exploratory, follows social media trends, "food as experience"	Fast, functional, balances health with ease	Practical, brand-loyal, driven by savings
UPF Mindset	Craves bold flavors, 'Instagrammable' appeal	Looks for efficient, grab-and-go, semi-healthy options	Seeks trusted staples, large packs, value-for-money
What They Need	Novel formats, fusion snacks, limited editions	Fortified snacks, ready meals, healthy spins on classics	Bulk formats, budget-friendly options, recognizable brand cues

Governments are responding- Labeling & reformulation initiatives

Governments are beginning to act with sugar taxes, nutrient profiling, advertising curbs, and early-stage UPF labeling proposals. However, there's no clear consensus on defining or regulating UPFs. The gap between voluntary industry standards and impending policy shifts represents both a risk and a window for leadership.

Country-wise Initiatives for UPFs



- Front of Pack Visual Ingredient Labeling
- Voluntary scores & reformulation
- Traditional/educational focus
- Ingredient reduction/nutri-score labeling
- Economic disincentives (tax)

Major food companies are feeling the effects of UPF fears

Major packaged food companies are starting to feel investor wariness toward portfolios dominated by UPFs. Many “Big Food” stocks have lagged in the market, coinciding with rising health consciousness and cost pressures.

Company	Approx. 1-Year Change	Share Price (Jul 31, 2025)	UPF Exposure / Strategy
Coca-Cola	+1%	$68.04	Carbonated soft drinks portfolio (UPF category)
Hershey	-7%	$186.1	Confectionery and snacks (High sugar/UPFs)
Kraft Heinz	-22%	$27.5	Core processed grocery (Significant exposure to UPFs)
Mondelez	-5%	$64.7	Snack-confectionery portfolio (Heavy in UPFs)
Nestlé	-20%	CHF 71.1	Diversified (coffee, pet food, nutrition brands)
PepsiCo	-21%	$138	Diversified beverages & snacks (High UPF-reliant)
Unilever	-6%	£4,511	Broadly diversified into hygiene and nutrition; reducing food focus

Beyond share prices, if western diets shift even modestly away from UPFs there could be a sizeable impact on the future growth trajectory for major food industry leaders. Profit margins are also at risk: reformulating products with healthier ingredients can raise costs by 10%–20%, and inflation-wary consumers may resist higher prices – driving consumers to look for ‘new’ brands, rather than staying loyal to old favorites. Clearly, the UPF narrative is already moving from niche nutritionist worry to boardroom risk.

Unfavorable volume/mix seen across major food giants

> In snacks, 2024 has been a slowdown...more awareness from consumers to the food and the drinks that they consume. Consumers are looking for improved favorites with lower sodium and lower fat and no artificial additives...more functionality and protein in their snacks. That's why the acquisitions of Siete and Sabra feed our strategy as they give us better-for-you snacks and portion-control.
>
> **Ramon Laguarta (PepsiCo – CEO)**

> Mondelēz posted 2.5 percentage point Y-o-Y decline in volume/mix in H1 2025 largely from chocolates and gum & candy segments – implying consumers rising focus on well-being, including reducing sodium and added sugar consumption or using weight-loss drugs to reduce consumption overall or change consumption patterns.
>
> **Mondelēz Q2 2025 Earning Release**

> Kraft Heinz saw 2.9% Y-o-Y decline in sales in 2024, driven by unfavorable volume/mix (-4.2 pp) from cold cuts, coffee, Lunchables, frozen snacks, and powdered beverages.
>
> **Kraft Heinz 2024 Annual Report**

Industry pushing toward cleaner reformulation but with concerns

Ultra-processed foods thrive on taste, convenience, and emotional comfort. As health awareness rises, industries must reformulate for cleaner labels, enable portion control, and transparently communicate to balance indulgence with wellness, sustaining loyalty while meeting evolving consumer expectations.

Key Drivers

Health and Wellness Focus

Growing demand for 'natural', 'clean-label', 'plant-based', and minimally processed products

Regulatory Policies

Governments implementing sugar taxes, stricter labeling, and marketing restrictions

Market Competition

Emerging brands leveraging "better-for-you" positioning to capture market share

Rise of FoodTech

Advances in alternative proteins, precision fermentation, and natural preservation

Key Restraints

Maintaining Taste & Loyalty

Reformulated products often struggle with taste, texture, and shelf-life – risking consumer dissatisfaction and loyalty loss

Reformulation & Cost Complexity

Replacing functional additives without losing sensorial is technically difficult and often costly

Supply Chain and Manufacturing Constraints

Natural ingredient alternatives are limited, expensive, and hard to scale – complicating sourcing, formulation, and manufacturing strategies

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3. How Is The Industry Responding?

This section examines how incumbents and disruptors / startups are responding to UPF disruption by removing red-flag ingredients, reformulating products with plant-based, fortified, and minimally processed alternatives, and investing in 'cleaner' UPFs

Reformulate, fortify, and rebrand to tackle UPFs

UPFs must not be approached as a ‘reactive fix’ or treated as a short-term PR problem. The opportunity lies in prioritizing meaningful reformulation, portfolio diversification, reshaping the narrative, and transparency to safeguard trust, growth, and brand equity.

Approaches adopted by incumbents and disruptors to respond to UPFs

Reformulate with functional intent

Cut sugar, salt, & fat gradually. Use scalable, taste-preserving alternatives in a phased rollout that won’t shock supply chains or alienate loyal consumers

Fortify for functionality

Don’t just remove the bad, add the good. Boost satiety and health credentials with natural proteins, fiber, and micronutrients

Expand plant-based lines

Launch minimally processed, plant-forward SKUs with real, recognizable ingredients

Reposition portion-smart products

Resize bestsellers to cut calories without changing taste or format

Use transparent and simplified labels

Use front-of-pack labels, ingredient origin disclosures, and processing details to build consumer trust

Embrace minimal processing

Adopt technologies that preserve nutrients and align with the “less-is-more” and “clean” consumer mindset

Executives must challenge the illusion that clean-label automatically delivers nutritional integrity. Clean-label, once a strategic moat, can become a brand liability without real nutritional merit.

Established players are rebalancing portfolios for long-term resilience

As established players respond to growing backlash against ultra-processed foods, their strategies reflect both the scale and urgency of transformation. Reformulation for cleaner labels, taste-first health upgrades, and portfolio diversification toward more natural and functional options are becoming central pillars of innovation.

COMPANY	FOCUS CATEGORIES	STRATEGIC ACTION
Nestlé	Snacks, beverages, frozen meals, confectionery	Reformulating lower sugar & salt, investing in plant-based & fortified products, acquiring health-focused startups
PEPSICO	Salty snacks, ready-to-drink beverages, breakfast foods	Expanding "Better-for-You" portfolio (e.g., Baked Lay's, zero-sugar beverages), investing in functional snacks & gut health
Mondelēz International	Biscuits, confectionery, snack bars	Portion control packaging, mindful snacking initiatives, premiumization, acquiring niche healthy snacking brands
KraftHeinz	Condiments, frozen meals, processed cheese, sauces	Renovating classic brands to improve health perceptions, launching plant-based SKUs, with affordability & convenience
General Mills	Breakfast cereals, ready meals, baking mixes	Shifting toward organic & natural segments (Annie's, Cascadian Farm), diversifying into functional & gut-health
Unilever	Ice cream, sauces, ready meals, plant-based meats	Expanding plant-based lines (e.g., The Vegetarian Butcher), reducing calorie and fat, transparent labeling push

Minimalist and transparent product claim

A wholesome, organic tube-feeding children formula designed with dehydrated natural fruits and vegetables, with no artificial ingredients

Nestlé

Launch Year: 2024

Switzerland

Label Claim: “Certified organic”, “vegan”, “no allergens”, “no artificial colors, flavors or sweeteners”, “gluten-free”

Key Ingredients: Sweet potato, brown rice, pears, blueberries, kale, peaches, tomato, carrots

Product Type: Organic blends for Children formula

Indulgence with gut-health benefits

A bubbly, gut-friendly soda that delivers bold fruit flavor with the added benefit of prebiotics and only few grams of sugar

PepsiCo

PEPSICO

Launch Year: 2024

US

Label Claim: “Sugar-free”, “No artificial sweeteners”, “Natural flavors”

Key Ingredients: Carbonated water, fruit juice concentrate, natural flavor

Product Type: Flavored sparkling water fruit juice

Reimagining classics as perfectly portioned indulgences

Indulgent Alpine milk chocolate in mindful, single-serve minis to satisfy sweet tooth without overdoing it

Mondelēz

Mondelēz International

Launch Year: 2024

Label Claim: “Single-serve”, “No artificial colors”
Key Ingredients: Milk chocolate, cocoa butter, Alpine milk
Product Type: Portion-controlled, small-format Milka bars

US

Traditional meats reimagined with plant-powered AI blends

An iconic hot dog reimagined in a plant-based, protein-rich twist – with the same smoky flavor, blending tradition with AI-powered innovation from NotCo

Kraft Heinz

Launch Year: 2024

KraftHeinz

US

Label Claim: "Plant-based", "Savory & smoky taste", "AI-formulated"

Key Ingredients: Pea protein, plant oils, bamboo fiber, mushroom, pea protein and acerola cherry

Product Type: Plant-based hot dogs and sausages

Optimizing formulations with whole grains and added protein

A dessert-inspired cereal delivering whole grains and extra protein for a guilt-free, energizing breakfast boost

General Mills

General Mills

Launch Year: 2025

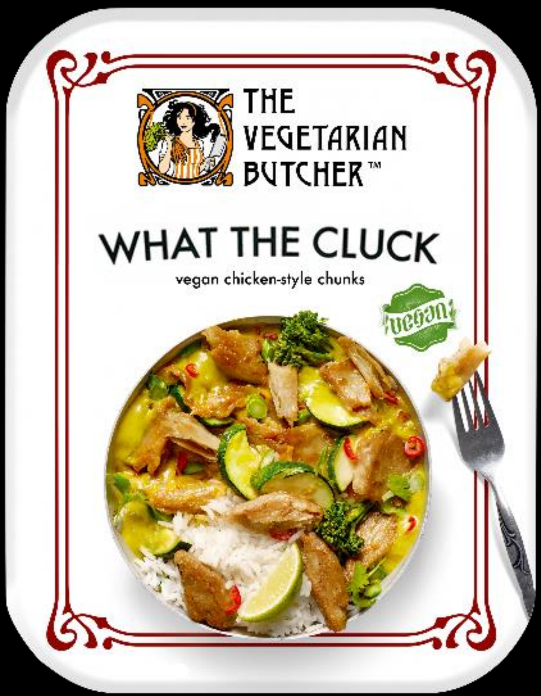
US

Label Claim: “8 g protein per serving”, “Whole grain”

Key Ingredients: Whole grain oats, whey protein, natural cookie flavor

Product Type: High-protein cereal with familiar cookie flavor

Mineral and vitamin fortification for plant proteins



Next-gen plant-based meats fortified with iron and B12, bringing authentic taste and better nutrition

Unilever

Unilever

Launch Year: 2025

UK

Label Claim: “Fortified with iron & B12”, “Chef-grade plant protein”, “Vegan”

Key Ingredients: Pea protein, soy, vegetable oils, spices

Product Type: Plant-based meat substitute

Nutritional and clean-label positioning claims

A wholesome, protein shake high in protein and fiber for digestive health – providing both satiety and nutritional benefits

Danone

DANONE
ONE PLANET. ONE HEALTH

Launch Year: 2025

France

Label Claim: “30g protein”, “no artificial colors and sweeteners”, “high fiber”

Key Ingredients: Milk proteins, inulin, vitamin A, vitamin D, stevia, sunflower lecithin, plant-oils

Product Type: Ready-to-Drink protein beverage

Next-gen nutrition product pioneers

Players are exploring protein structuring, natural ingredient inclusions, high-fiber based systems to deliver high-protein, low-carb, clean-label products. These companies emphasize nutrition density, functionality, and diet-friendly positioning.

Glanbia Nutritionals

Patent No: US2025/0134136A1

US

Key Innovation: Protein structuring using transglutaminase, an enzyme that crosslinks proteins, to form a gelatinized protein cake before extrusion of pea-based pasta

Label Claim: 55% protein, plant-based, gluten-free

Application: High-protein plant-based pasta

Godbawee Food Corporation

Patent No: KR20250029516A

South Korea

Key Innovation: Multi-step seaweed processing and transformation into noodles with low oil and complete dehydration techniques

Label Claim: Low-carb, low-calorie, gluten-free, rich in minerals & vitamins, immune support, diet-friendly

Application: Functional seaweed-based noodles

HIFOOD by CSM Ingredients

Patent No: US12225920B2

Italy

Key Innovation: Fiber-based aqueous composition design with dextrin and vegetable bran for cereals, baked goods, and more

Label Claim: Sugar-free, fat-free, high-fiber, low-calorie

Application: High-fiber breakfast cereal

Startups are challenging the norm with 'better' UPF alternatives

Startups are trying to transform ultra-processed categories by replacing empty carbs, sugar, and additives with protein, fiber, and plant-based ingredients. Rather than avoiding processing, they use it to create functional, health-focused products, turning UPFs into convenient, nutritious options.

SURREAL

UK

Key Innovation: Offers high-protein, low-carb, zero-sugar breakfast cereal that cater to adult nutritional needs

Label Claim: High-protein, low-carb, zero-sugar

Application: High-protein breakfast cereal

ZERO CARB company

Netherlands

Key Innovation: Develops zero-carb, gluten-free bakery products with advanced baking techniques

Label Claim: Low-carb, gluten-free, high-protein, low-sugar

Application: Functional bakery products

COSMIX

India

Key Innovation: High-protein powder with natural flavors to curb satiety, along with digestive herb blends and no unnecessary fillers

Label Claim: No-nonsense plant protein, no sugar, no artificial flavors

Application: Protein supplements

Investor interest is fueling innovation and market disruption

Better-for-you and functional food startups are garnering investor attention, highlighting strong consumer demand for sustainable, healthy, and innovative food solutions.

Startup Name	Description	Total Funding ($ Mn)
Athletic Brewing	Non-alcoholic craft beer	303.7
BlueNalu	Cellular aquaculture company offering seafood	118.3
Daiz	Plant-based meat via proprietary 'Ochiai Germination Method'	93.1
Planet A Foods	Cocoa-free chocolate	73.4
Lucky Energy	Functional energy drinks	38.0
Eden Brew	Animal-free and precision-fermented milk and dairy products	22.3
Immi	Low net carb and high protein instant ramen	16.8
IQ Bar	Protein bars and IQMIX hydration mixes	10.4
Rev Energy Gum	Sugar-free energy gum	8.6
Seven Sundays	Naturally sweetened and nutrient-dense breakfast cereals	8.0

Emerging trends in UPFs

UPF consumers are evolving from pure indulgence and convenience toward more balanced, transparent, and mindful processed choices.

1 Convenience With Conscience

Consumers want quick and easy solutions, but now also look for cleaner labels, natural ingredients, and less "chemical" perception in processed foods

2 Moderation Over Excess

Rising focus on moderation and portion control is pushing brands to offer smaller pack sizes, balanced macros, and reduced sugar or fat even in indulgent UPF formats

3 Radical Transparency

Shoppers are demanding ingredient transparency and ethical processing stories, transforming UPFs into simpler formulations and responsible sourcing narratives

New rules of processing: From scale to strategic value

Traditional processing prioritized cost, shelf life, and uniformity. Today, however, success hinges on preserving nutrients, enabling clean labels, and delivering standout sensory experiences. As consumers increasingly demand authenticity and sustainability, next-generation technologies have become essential for brands to stay relevant and competitive.

Yesterday's Priorities	Tomorrow's Imperatives
Cost reduction	Nutrient preservation and density
Shelf-life extension	Clean-label ingredient functionality
Mass uniformity	Differentiated sensory experiences
Standardized quality	Energy efficiency
Maximizing production	Customization and personalization
Scalability	Responsiveness to consumer sentiments

Techniques that preserve nutritional integrity

Emerging non-thermal methods like ultrasonication and pulsed electric field reduce pathogens while preserving nutritional and sensory quality. Infrared drying, though thermal, offers precision and efficiency when used alone or in combination with methods like hot air, vacuum, or microwave drying.

Ultrasonication

Dairy alternatives | Juices | Sauces | Chocolates

How it works: High-frequency sound waves generate cavitation bubbles that disrupt particles, emulsify ingredients, and inactivate microbes with minimal heat exposure

Impact: Lower thermal damage, reduced need for additives, smoother consistency, better flavor, and nutrient preservation

Outcome: Clean-label, energy-efficient, better shelf life, and mouthfeel

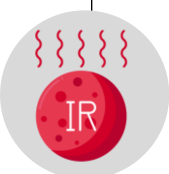
Pulse Electric Field

Plant-based drinks | Fermented drinks | Meat

How it works: Applies short bursts of high-voltage electric pulses to inactivate microbes and enzymes without significant heat

Impact: Preserves color, flavor, and nutrients better than thermal methods; reduces energy and processing load

Outcome: Extends shelf life without preservatives, fresher taste profile, improved product quality and sustainability



Infrared Drying

Bakery | Snacks | Cereals | Meat | Bars | Chips

How it works: Uses electromagnetic radiation to heat products directly and uniformly, reducing drying time and preventing surface hardening

Impact: Faster throughput, lower energy consumption, improved texture and color retention, reduced overprocessing

Outcome: Crispier textures, vibrant appearance, better nutrient preservation, and fewer burnt or bitter notes

4. Time to Rethink, Reformulate, and Lead: What's Next?

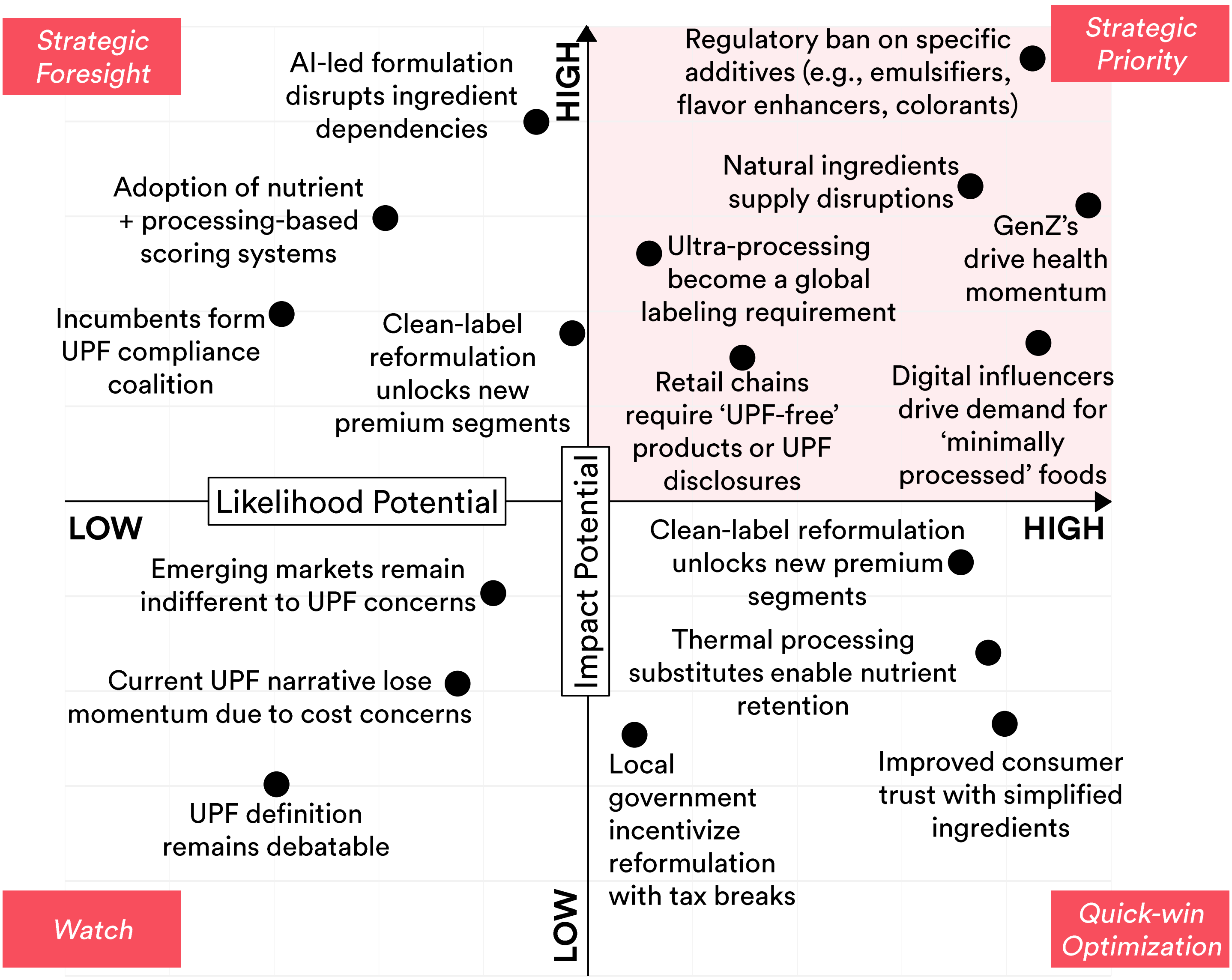
Ultra-processed foods are redefining taste, convenience, and indulgence expectations worldwide. Now is the time for food companies to evolve. Rethink formulation, messaging, and offerings to balance pleasure with rising health and transparency demands.

FutureBridge empowers clients with regulatory foresight, innovation scouting, and strategic partnerships – delivering future-ready, clean-label solutions that resonate with consumers and align with business goals.

What's next: Act on the critical, track the emerging

Strategic Priority zone demand proactive planning, cross-functional response and accelerated response, while Strategic Foresight zone provides scenarios with emerging signals for companies to invest in monitoring and scenario modeling.

The Four Zones of Strategic Action



Impact Potential – Indicates potential consequence on product performance, brand equity, regulatory compliance, or profitability

Likelihood Potential – Indicates how probable is the scenario based on current regulatory signals, market dynamics, or technological maturity

Reformulate with purpose

To thrive in the evolving UPF landscape, food and ingredient companies must move beyond compliance and lead with transparent, and functional innovation. FutureBridge empowers clients across four key areas to deliver foresight, reformulation agility, and strategic positioning to transform UPFs into trusted, purposeful offerings.

1. Ingredient Integrity

Consumers want simplicity but also function. Labels must be short, familiar, and fortified.

FutureBridge maps risky ingredients, and scout clean-label alternatives and fortification levers.

2. Collaborative Innovation

Collaborate with startups, research labs, and tech platforms to accelerate processing and ingredient breakthroughs.

FutureBridge spots disruptive partners and partnership models to unlock next-gen solutions.

3. Regulatory and Reformulation Agility

Navigate rising scrutiny on additives and processing methods. Create agile pipelines to rapidly respond to ingredient bans, retailer standards, or consumer shifts.

We track global regulatory shifts, map compliance risks, and accelerate reformulation with foresight.

4. Stealth Reduction vs. Non-UPF Strategies

Tackle UPF dominance through multiple approaches: gradual nutrient and labelling improvements, to non-UPF product ranges (e.g., delivered via private label).

We pinpoint high-value reformulation and replacement opportunities and map clear pathways to scale them effectively.

We believe UPFs can be reimagined, not just reduced. But it requires marrying reformulation science with brand reinvention and regulatory foresight.

One market, many playbooks: What brands must do differently

UPFs play out differently by categories – snacks, confectionery, meals, drinks. Premium brands must rework indulgence without losing edge, private labels juggle cost and health, while startups disrupt with functionality. Winning demands category-aware, brand-specific strategies.

Brand Type	Strategic Imperatives	Priority Actions
Premium Brands	Redefine indulgence through clean innovation	• Use natural boosters for taste and texture • Highlight minimal processing and functional benefits • Own the wellness narrative (gut, brain, energy)
Mass Market Brands	Normalize health without killing volume	• Reformulate gradually without compromising taste • Launch portion-smart packs • Emphasize “value-for-health” in pricing and marketing • Align with ESG/nutrition pledges to protect brand equity
Private Label	Balance value with perceived health	• Cut sugar, salt, and additives smartly using low-cost swaps • Adopt simple front-of-pack scores • Expand affordable “better-for-you” lines
Startups and Disruptors	Redesign UPFs from scratch	• Rethink UPFs with protein and fiber-first positioning • Shift narrative from “junk” to “smart” processing • Use novel processes (e.g., structured proteins) as a differentiator • Build investor alignment through functional and ESG-led stories

Function-led action plans to drive the evolution of UPFs

Clear action steps across business functions to lead the transformation of UPFs

Function	Growth Play 2025–30	Capability Needed
R&D	Accelerate clean-label ingredient discovery, reduce additive complexity, and boost nutrient density (e.g., fiber, protein)	Advanced formulation platforms, rapid prototyping labs, ingredient traceability systems
Processing & Manufacturing	Simplify processing workflows, scale minimal and hybrid techniques (e.g., fermentation, cold-press) Transition to smaller, modular batch runs for reformulated or “next-gen” UPFs	Flexible, low-thermal, and gentle-processing technologies. Agile multi-product lines, real-time changeover systems, upgraded food safety analytics
Packaging	Use transparent design (clear packs, clean labels); spotlight portion control and sustainability	Recyclable/mono-materials, smart traceability tech, portion-control enabled formats
Brand & marketing	Reframe UPFs from "processed" to "purpose-driven“; highlight functionality, ingredient integrity, and nutrition	New storytelling frameworks, digital-first influencer strategy, robust claim substantiation
Procurement	Secure clean-label-aligned ingredient pipelines; build resilience against volatility in novel input supplies	Supplier diversification, long-term sourcing partnerships, quality and spec management tools
Regulatory Affairs	Anticipate evolving UPF definitions and labeling mandates across regions	Horizon scanning tools, global regulatory scenario planning, agile compliance teams

Our Food & Nutrition Team

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Prakhar joined FutureBridge in January 2024, bringing over 13 years of research, strategic consulting and techno-commercial experience spanning the consumer product goods sector.

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Continue the conversation

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FutureBridge is a techno-commercial consulting and advisory company. We track and advise on the future of industries from a 1-to-25-year perspective.

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