

FutureBridge



NEWSLETTER **APRIL** EDITION 2026

Kottmeyer's Almanac *on* **DOWNSTREAM AG**

The Boardroom Brief: What Global Downstream
Food & Agribusiness C-Suite Needs to Know



EXECUTIVE SUMMARY: THE 11 STRUCTURAL THEMES OF APRIL 2026

Theme 1: Tariff Shock Hits Consumer Prices; Liberation Day at Year 1

April 2, 2026 marks one year since Liberation Day imposed the highest U.S. tariff regime since the Smoot-Hawley Act of 1930, and the downstream consumer food system is now absorbing the full pass-through. Grocery prices on imported-input categories (olive oil, canned tomatoes, pasta, chocolate, coffee, wine, and seafood) have risen 8–14% since April 2025. Packaging inputs including aluminum, steel cans, and glass carry embedded tariff costs manufacturers can no longer absorb. Consumer grocery price anxiety has returned to 2022 peak levels. In Europe, EU retaliatory tariffs are materially disadvantaging U.S. food and beverage brands across premium retail and hospitality channels. The margin compression Big Food absorbed through 2025 is now landing on retail shelves simultaneously with GLP-1 demand compression and private label acceleration, a triple-front pressure event that will sort CPG winners from losers before the end of Q2.

Theme 2: Q1 2026 Earnings Season: Volume Recovery Stalls or Accelerates?

The verdict on two years of CPG reinvestment strategies is arriving in real time. Nestlé posted its first positive organic growth quarter after four consecutive declines. Danone's GLP-1-aligned dairy and nutrition segments are growing at 3–6%. Campbell's Rao's brand is up 22%. But Kraft Heinz missed its own volume guidance despite \$600M of reinvestment. The earnings season is revealing a single structural truth: brands that maintained V-score investment through the pricing cycle are recovering; brands that allowed V-score erosion to optimize short-term margin are not recovering regardless of reinvestment level. This is not a reinvestment story; it is a behavioral demand architecture story. The bifurcation is widening, not closing.

Theme 3: Hard Discount's Second Act + The Private Label Supercycle

Store brand unit share crossed 21.3% of all U.S. food and grocery sales, the highest in recorded history and above the 20% structural tipping point PLMA identifies. The \$2.9B PE acquisition of TreeHouse Foods closed. In Europe, Aldi UK and Lidl UK together hold 18.2% of total grocery spending, the mature market state U.S. grocery is a decade behind reaching, but is now accelerating toward on precisely the trajectory the UK playbook predicted.

Theme 4: MAHA Regulatory Acceleration

The Make America Healthy Again Commission is executing across four simultaneous workstreams: artificial food coloring bans, SNAP eligibility restriction proposals, school lunch nutrition standard revisions, and front-of-pack labeling rulemaking. Red Dye No. 3 implementation is in effect. California AB 2244 (ultraprocessed food warning labels) advanced out of committee in March 2026. The EU is running parallel reform through Nutri-Score algorithm revision and mandatory front-of-pack labeling. The two largest food regulatory frameworks in the world are converging on the same destination simultaneously.

Theme 5: GLP-1 Moves to Portfolio Surgery

GLP-1 medication users have reached 18 million active U.S. adults (5.4% of the adult population) growing at 350,000–400,000 new prescriptions per month. European penetration reached 2.8% of EU adults. Circana's Q1 2026 GLP-1 household panel shows basket size reductions of 14–18% per trip, conventional snack volumes down 19%, and sugary cereal volumes down 24% among GLP-1

users. WW International filed for Chapter 11, the first major GLP-1 casualty in consumer food-adjacent services.

Theme 6: QSR Under Structural Pressure

U.S. QSR same-store traffic was negative across most major chains in Q1 2026. McDonald's U.S. comparable traffic declined for the third consecutive quarter. GLP-1 behavioral compression, tariff-driven ingredient cost elevation, and the structural value war are compressing margins simultaneously. European QSR operators are 18–24 months behind U.S. GLP-1 traffic impact; but the leading indicators are arriving.

Theme 7: Age of Scale in Motion

The \$44.8B Unilever-McCormick combination reset the global flavor and condiment competitive map. Danone acquired Huel for €1B. DSM-Firmenich sold its Animal Nutrition division for €2.2B. Every major strategic move of Q1 2026 confirms the Age of Scale thesis: scale, IP ownership, and behavioral demand durability are the only three defensible competitive positions in modern food.

Theme 8: European Grocery, CPG & Retail Media

European grocery's structural transformation is accelerating: hard discount share at record highs, EUDR compliance deadlines at December 30, 2026, CBAM and CSRD cost stacks compounding, and retail media networks emerging as the new shelf access fee. Carrefour's own-brand portfolio reached 38% of European revenue. Tesco's Clubcard data platform is the most sophisticated retail media infrastructure in global grocery.

Theme 9: Cocoa & Coffee Input Cost Crisis

Arabica coffee futures held above \$2.90/lb through Q1 2026. Cocoa swung toward a projected 75,000-tonne surplus for 2024/25; but the processor economics were permanently damaged by two years of \$7,000+/tonne cocoa. Mondelēz faces simultaneous input cost crisis and GLP-1 demand compression in its core confectionery portfolio.

Theme 10: The Private Label Supercycle

Store brand's ascent to 21.3% unit share crossed the structural threshold that permanently changes CPG pricing power. The \$2.9B PE acquisition of TreeHouse Foods represents institutional capital making a structural bet on private label as a standalone asset class. National brands not actively engineering genuine behavioral demand differentiation are ceding shelf economics to retailers who manufacture at 60–70% of the national brand cost and close 80% of the quality gap.

Theme 11: Pet Food. The Category That Defies Consumer Stress

Pet food is the one CPG category demonstrating consistent volume growth and premium pricing power while human food categories contract. Blue Buffalo grew 3%. GLP-1 users are reducing their own food intake while simultaneously increasing spend on premium pet nutrition. The V-score architecture of premium pet food (built on veterinary authority, safety certification, and species-specific nutritional science) is the most resilient trust structure in the entire CPG universe.



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THEME 1:

Tariff Shock Hits Consumer Prices

Liberation Day at Year 1: When Trade Policy Becomes a Grocery Store Problem

1. Liberation Day +1 Year: U.S. Consumer Food Prices Now Absorbing the Full Tariff Stack us

Council on Foreign Relations | [Read Article 1](#) | [Read Article 2](#)

One year after the April 2, 2025 "Liberation Day" declaration, the U.S. food system is actively absorbing compounding tariff pressures. All 2025 tariff actions combined pushed food prices up 2.8%, with fresh produce up 4%. Economists estimate a 12-to-18-month consumer pass-through lag, placing peak pressure between April and October 2026. Yale Budget Lab projects the tariff scenario translates to a loss of \$1,130-\$1,340 per household annually if Section 122 tariffs are made permanent, or \$650-\$780 if they expire as scheduled. The commodity exposure is stark: U.S. soybean exports to China fell 78% through August 2025, corn exports collapsed by 99%, and Brazilian coffee imports now face a 50% U.S. tariff, shifting food security from a domestic pricing concern into a broader question of global supply stability.

SO WHAT: The tariff-to-shelf-price transmission is complete, and the critical commercial question is not "how much did prices rise?" but "which consumers are staying, and by which behavioral mechanism?" The P-gene in the PECA-V framework has been structurally compressed across imported-input categories. For branded CPG, this is simultaneously a V-risk event: when prices rise due to tariffs outside the brand's control, consumers experience it as a brand trust failure, not a policy-driven cost pass-through. Companies that explain the "why" through origin transparency, supply chain storytelling, and regulatory context will maintain V-scores better than those who raise prices silently and hope consumers don't notice.

NOW WHAT → FutureBridge: Consumomics™ PECA-V scoring across the 15 highest tariff-impact food categories will identify exactly which categories retain behavioral demand robust enough to sustain 8–14% price elevation and which are entering V-crack territory. Deliverable: a Tariff Impact Behavioral Demand Diagnostic : a category-level PECA-V scorecard telling CPG strategy teams which brands can hold price and which require promotional intervention or reformulation to maintain volume.

Contrarian FutureBridge POV: The consensus CPG response is to either absorb or pass through. The Consumomics insight is that tariff-driven price increases are a rare opportunity to engineer the V-score. Brands that use the tariff environment to tell a compelling origin, quality, and supply chain transparency story will emerge from the tariff cycle with higher V-scores than they entered with. The \$18 bottle of olive oil with a QR code linking to the Sicilian grove it came from is V-engineering at work. The \$18 bottle with no story is V-decay accelerated.

2. Grocery Price Anxiety Returns to 2022 Peak; Stress Concentrates in Specific Categories, Not General Inflation us

CFR / Morning Consult | [Read Article 1](#) | [Read Article 2](#)

A CFR-Morning Consult poll conducted in January 2026 among 2,203 respondents shows grocery and food costs ranking as Americans' top affordability concern across party lines, matching the intensity of 2022 inflation anxiety. The survey found that 73% of Americans are worried about being able to pay for groceries, and more than 65% said tariffs had made a range of everyday items less affordable. Purdue University agricultural economist Jayson Lusk observed that "consumer anxiety

is increasingly driven by food prices and tariffs, not inflation as a general economic concept," a shift from broad macro worry to category-specific price shocks. With olive oil, coffee, and canned goods registering the sharpest tariff-linked price increases, consumers are no longer blaming the economy at large. Instead, they are experiencing specific import-dependent staples as the direct site of financial pain, creating a volatile environment where brand loyalty is eroding in high-tariff aisles.

SO WHAT: "73% of consumers report price anxiety" is an aggregate headline that masks radically different behavioral responses across consumer phenotypes. The Budget Protector phenotype is switching to private label immediately and permanently. The Health Optimizer is reducing purchase frequency while maintaining the brand, a V-preservation response, not brand defection. These are fundamentally different commercial behaviors requiring fundamentally different responses. CPG companies applying a single promotional response to a 73% aggregate anxiety number are misallocating trade spend by as much as 40% relative to what behavioral demand data would prescribe.

NOW WHAT → **FutureBridge: Consumomics** Consumer Genome Atlas can produce a Phenotype-Level Tariff Response Map, scoring how each of the 10-12 most commercially significant consumer phenotypes is responding to price elevation in each affected category, and prescribing the specific E>C>A intervention required to prevent V-score erosion in each segment. Morning Consult tells you 73% are anxious; Consumomics tells you which 73% and what to do about each one.

3. Conagra Q3 FY2026: Managing 7% Inflation & Tariff Headwinds

US

Conagra Brands/ Insider Monkey Earnings | [Read Article 1](#) | [Read Article 2](#)

Conagra Brands' Q3 FY2026 results, released April 1, 2026, confirmed the company is navigating a 7% cost of goods sold inflation rate, comprising 4% core inflation and 3% from gross tariffs before mitigation. CEO Sean Connolly stated that tariff-related costs are expected to add more than \$200 million annually to the company's cost of goods sold, driven by a 50% tariff on imported tin plate steel and aluminum, a 30% rate on limited imports from China, and a 10% reciprocal rate on imports from other countries. CFO Dave Marberger noted the inflation picture has "pretty much played out" with core inflation and tariff mitigation broadly in line with the company's original framework. Connolly characterized the period as a pivot to a "volume-first" strategy, with organic net sales rising 2.4% in the quarter and the Refrigerated and Frozen segment up 3.6%. The company narrowed its full-year adjusted EPS guidance to approximately \$1.70, with management flagging that tariff mitigation wrap-around effects will create residual headwinds into FY2027.

SO WHAT: Conagra's ability to maintain an adjusted operating margin near the high end of its 11.0%-11.5% range, despite 7% inflation, establishes a scale-correlated benchmark for the industry. This implies a significant mitigation capacity estimated by analysts at over 40%, which smaller CPG companies cannot match. Smaller competitors without Conagra's procurement scale are facing unmitigated exposure, forcing more aggressive shelf-price hikes that risk damaging their P-gene score relative to larger, more resilient brands.

NOW WHAT → **FutureBridge: FutureBridge OSINT** can build a Tariff Exposure Competitive Intelligence Model, mapping competitors' packaging format, ingredient origin, and supplier diversification status to estimate gross tariff exposure and mitigation capacity relative to the client. Combined with Consumomics P-gene scoring, this creates a category-level competitive position

forecast under three tariff duration scenarios: resolution by Q4 2026, extension through 2027, and permanent tariff architecture.

4. EU Retaliatory Tariffs on U.S. Bourbon and Food Exports; European Shelf Prices Reprice American Brands EU

FoodNavigator Europe / AAEA | [Read Article 1](#) | [Read Article 2](#)

The EU's retaliatory tariff framework has placed American food and beverage brands in a materially uncertain competitive position across European retail markets. The EU had threatened to reinstate a 30% retaliatory tariff on U.S. bourbon and American whiskeys as a countermeasure to U.S. steel and aluminum duties. As of February 5, 2026, the EU extended its suspension of those retaliatory measures for a further six months through August 2026, granting temporary relief to American distillers. However, the suspension is conditional on U.S.-EU trade negotiations progressing, and no permanent zero-for-zero agreement has been reached. The uncertainty itself is commercially damaging: American distillers cannot commit to European distribution expansion without the certainty of permanent tariff-free access. Separately, American almonds, soybeans, and corn-derived ingredients continue to face elevated import duties under other measures, with European food manufacturers actively substituting with EU-origin or Ukrainian-origin alternatives. AAEA Choices Magazine analysis estimates U.S. agricultural exports under the Liberation Day scenario faced a projected 39.1% decline.

SO WHAT: The EU retaliatory tariff threat, even while suspended, is not primarily a P-gene story for American brands in Europe; it is a V-gene story. The uncertainty itself depresses distributor and retailer willingness to build American brand inventory. When the threat of reinstatement elevates the price risk of stocking U.S. bourbon above equivalent Scotch or Irish whiskey, European buyers face a procurement risk calculus that favors local equivalents regardless of the current suspension. Where the brand's V-score is fully locked, buyers absorb some uncertainty. Where V is only moderate, the threat alone is enough to trigger sourcing substitution long before any tariff is actually reinstated.

5. EU Tariff Uncertainty Accelerates Local Procurement; European Retailers Deepen Domestic Sourcing Programs EU

FoodNavigator / International Supermarket News | [Read Article](#) | [Retail Trends](#)

Tariff-driven cost unpredictability is accelerating local and EU-origin procurement programs across major European grocery retailers. ING Bank sector economist Thijs Geijer noted that intra-European food trade is already growing faster than exports to either the U.S. or China, as retailers respond to tariff volatility by deepening domestic supply chains. International Supermarket News' February 2026 retail trends analysis documented Tesco, Carrefour, and Ahold Delhaize prioritising supply chain resilience and private label expansion as a structural buffer against import cost exposure. European Supermarket Magazine's coverage confirms individual retailer moves: Sainsbury's announced a 5 billion pound multi-year investment in British and Irish farm partnerships, and Spanish retailer Dia

committed 16 million euros to purchasing 100% local-origin strawberries, illustrating that tariff-driven origin transparency is becoming a commercial imperative, not just a sustainability posture.

SO WHAT: European grocery's local sourcing acceleration is a structural V-gene shift, not just a procurement decision. "Local" and "EU-origin" are functioning as V-amplifiers: satisfying the regulatory readiness, claim credibility, and institutional acceptance components of the V-gene simultaneously. U.S. exporters competing against EU-origin alternatives are not simply facing a cost disadvantage; they are facing a V-gene disadvantage in categories where origin transparency is a primary trust signal. The supply chain relationships European buyers are building with local suppliers in 2026 will persist into 2028 and beyond, regardless of tariff normalization.

6. Nogales Gateway: USMCA Renegotiation and Tomato Duty Shock Signal Fresh Produce's Tariff Vulnerability

Produce Business | [Read Article](#)

Nogales, AZ, historically the single largest inland U.S. port of entry for vegetables handling more than \$3.5 billion in trade annually, is operating under elevated cost pressure driven by two policy events. First, the expiration of the Tomato Suspension Agreement in 2025, which had protected Mexican tomato imports from standard duty obligations, resulted in new duties being implemented, increasing costs throughout the supply chain. Second, the 2026 renegotiation of USMCA is creating what J.E. Russell Produce Senior VP Hutch Morton described as a potential "existential threat" to the cross-border supply chain: citing last summer's 25% tariff on American watermelons, which added hundreds of thousands of dollars in supply chain costs borne entirely by end consumers. SunFed's Matt Mandel noted U.S. consumers are "accustomed to fresh produce prices well below many other countries," making even modest duty increases structurally destabilizing given the industry's already-compressed margins.

SO WHAT: Nogales is the produce industry's version of the aluminum can: a concentrated supply chain chokepoint where even a temporary tariff creates disproportionate costs because the product is perishable, the logistics window is narrow, and there is no rapid domestic substitution available. The USMCA renegotiation risk is not symmetric: the U.S. imports more fresh produce from Mexico than it exports back, meaning retaliatory Mexican duties on U.S. goods would not restore balance. The behavioral demand implication is direct: fresh produce price increases driven by duty costs or supply chain disruption cannot be offset by reformulation or substitution the way packaged food categories can respond. When Nogales tomato prices rise 15% due to duty imposition, there is no private label substitute for a tomato. The full P-gene compression passes directly to the consumer.

7. Tariff-Driven Pantry Stocking: U.S. Consumers Pre-Buy Ahead of Price Increases

Retail Brew / EY Consumer Sentiment Survey | [Read Article 1](#) | [Read Article 2](#)

Retail Brew's March 2026 reporting, drawing on EY-Parthenon's Wave 3 consumer sentiment survey of more than 2,000 U.S. consumers, documents the defensive behavioral shift now visible across U.S. grocery channels. One in four shoppers reported being financially worse off than a month prior,

with nearly 70% citing rising grocery prices as a moderate or major concern. In response, consumers are pre-emptively switching retailers, stocking value-category pantry staples, and accelerating store-brand adoption. The behavior is concentrated in tariff-sensitive imported categories, with higher-income households showing the strongest pre-buy patterns. This one-time volume pull-forward in Q1 and early Q2 2026 risks materially distorting planning benchmarks if misread as a demand recovery signal.

SO WHAT: The pantry-stocking bump is a one-time demand pull-forward creating a corresponding demand trough in Q2 for the affected categories. In PECA-V terms, this is an A-gene disruption event in disguise: when a consumer buys three months of olive oil in one trip, their automatic purchase cadence for that category is disrupted; they will not be in-market for 8-12 weeks. Every CPG commercial team that interprets the March-April scanner spike as volume recovery will spend Q2 trade dollars against consumers who are already stocked.

NOW WHAT → **FutureBridge: Consumomics** occasion-level scoring can separate the stockpiling behavior signal from genuine repeat-purchase ritual rebuilding. Named deliverable: a Q2 2026 Trade Spend Reallocation Recommendation that prevents investment against stocked consumers and redirects resources toward the non-tariff-sensitive categories where genuine behavioral demand recovery is occurring.

8. IEEPA Legal Challenge Advances; Three Scenarios That Could Reshape the Tariff Architecture Overnight us

CSIS / Ropes & Gray / CoBank | [Read Article 1](#) | [Read Article 2](#)

The legal challenge to the executive branch's tariff authority reached a historic climax, when the U.S. Supreme Court ruled 6-3 in *Learning Resources, Inc. v. Trump*. The Court held that the **International Emergency Economic Powers Act (IEEPA)**, the primary legal engine for the **April 2, 2025, "Liberation Day"** tariffs, does not grant the President the power to unilaterally impose duties. Chief Justice Roberts, writing for the majority, invoked the **Major Questions Doctrine**, asserting that such "highly consequential power" over taxation and trade traditionally rests with Congress and cannot be derived from IEEPA's authority to "regulate" imports.

SO WHAT: The Supreme Court's 6-3 ruling on February 20, 2026 is now settled law. The IEEPA-based Liberation Day tariff architecture has been struck down; the President does not have unilateral authority to impose duties of this scale under IEEPA. The commercial implications are immediate and threefold: (1) The administration has pivoted to Section 122 of the Trade Act of 1974, imposing a 10% global tariff effective February 24, CPG procurement teams must now model against this replacement architecture, not the struck-down IEEPA regime. (2) Importers who overpaid IEEPA tariffs between April 2025 and the ruling date are entitled to refunds; companies should immediately audit their customs filings and initiate refund claims through CBP. (3) The legislative scramble to restore statutory tariff authority in a divided Congress creates a 6–18 month window of genuine policy uncertainty, the Section 122 tariffs are the interim architecture, but their durability depends on Congressional action. CPG procurement and pricing strategy teams must now model three scenarios: Section 122 tariffs persist, Congress passes new statutory tariff authority at similar or higher rates, or a negotiated trade framework reduces tariffs bilaterally. The "tariffs disappear entirely" scenario is the least commercially probable.

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NOW WHAT → **FutureBridge: FutureBridge Regulatory Prediction** and Impact can build a Three-Scenario IEEPA Outcome Model : full authority confirmed, partial limitation, and full tariff invalidation, translating each into specific downstream margin impact projections for branded CPG operators across the 15 highest-tariff-exposure food categories, with Q3–Q4 2026 timeline probability weights for each scenario.

9. Coca-Cola Q1 2026: \$350–400M Aluminum Tariff Headwind; Largest Publicly Quantified Tariff Cost in Food and Beverage us

Coca-Cola / Beverage Daily | [Read Article](#)

⚠ NOTE: Q1 2026 results scheduled to be reported April 28, 2026. Figures are projected from analyst consensus and Q4 2025 data and must be updated post-April 28 with verified actuals.

Coca-Cola has publicly guided for a \$350-400 million full-year headwind from aluminum can tariffs affecting North American packaging costs, the largest single publicly quantified tariff cost exposure in the food and beverage industry. Based on Q4 2025 momentum and company guidance, analysts project Q1 2026 organic revenue growth near 5% with volume growth of approximately 2% globally. European volumes have been growing, led by Coca-Cola Zero Sugar and Fuze Tea. U.S. volumes are showing resilience among lower-income and Hispanic consumer segments.

SO WHAT: Coca-Cola's ability to absorb \$350-400M while maintaining volume growth reflects V-lock and scale procurement position that no smaller beverage company can replicate. For every smaller beverage company facing the same per-can aluminum tariff cost without Coca-Cola's scale, the margin impact is proportionally larger and the ability to pass it to consumers without volume loss is proportionally lower. Coca-Cola's aluminum tariff absorption becomes a competitive moat; maintaining shelf prices while competitors must raise them, compounding its A-gene ritual automaticity advantage in the everyday cold drink occasion.

10. Soybean Oil at 2.5-Year Highs: When the Iran War, Biofuel Policy, and Food Inputs Converge

Food Business News | [Read Article](#)

Cash soybean oil prices reached fresh 2.5-year highs in late March 2026, breaching the 70¢/lb benchmark for the first time since September 2023. Since January 1, 2026, nearby West Texas Intermediate crude oil futures have surged 93%, and nearby soybean oil futures have gained 39%, the two markets moving in near-lockstep. The primary drivers: escalating U.S.–Iran tensions elevating global crude prices, and the EPA's announcement of 2026–2027 Renewable Volume Obligations (RVOs) for biomass-based diesel at the highest levels since the Renewable Fuel Standard program began, representing a 60% increase over 2025 mandates. Imports of biofuel feedstocks including used cooking oil from China will continue to receive full tax credit through 2028. The combination of energy market spillover and biofuel mandate amplification has structurally elevated the floor under edible oil prices. Other oil prices followed: edible tallow up sharply, corn oil up 11.4%, canola oil up 6.5%, and cottonseed oil up 5.4% on the week.

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SO WHAT: The soybean oil price surge is the clearest current evidence that the Iran War's energy market impact has a direct food system transmission mechanism that operates faster and with broader category impact than tariff pass-through. In PECA-V terms, this is a simultaneous P-gene compression event across every category using plant-derived oils, mayonnaise, salad dressings, frying oils, snack foods, and baked goods. The FBN ingredient index confirms: mayonnaise's ingredient cost index rose 2.3 points in one week; frozen apple pie +1.6 points. The biofuel RVO architecture creates structural floor under edible oil prices through 2027 regardless of geopolitical resolution, because renewable fuel mandates compete directly with food use for soybean oil supply even when the Iran conflict's energy premium is removed. CPG manufacturers who have not forward-contracted edible oil supply through at least Q3 2026 are facing unhedged input cost exposure in their two most price-elastic categories.

11. USDA Planting Report: U.S. Corn to Soybean Shift Signals Long-Cycle Ingredient Supply Architecture Rebalancing

Food Business News | [Read Article](#)

The USDA's March 2026 Prospective Plantings report documented a notable acreage shift in U.S. crop mix: corn planted area forecast at 95.3 million acres (down 3% from 2025), soybeans at 84.7 million acres (up 4%), and total wheat at 43.8 million acres (down 3%, representing the lowest U.S. wheat acreage since records began in 1919). Durum wheat specifically fell 11% to 1.95 million acres. All six major rice-producing states intend to plant fewer acres in 2026. The corn-to-soybean shift reflects farmer response to higher soybean demand amid biofuel mandate amplification and China purchasing patterns. The wheat acreage decline, a long-term structural trend, carries implications for flour inputs across bakery, pasta, and snack categories. Separately, farmers intend to plant 1,236,000 acres to dry edible beans (down 10%), 499,000 to chickpeas (down 7%), and 832,000 to lentils (down 12%), while dry edible peas remain steady.

SO WHAT: The USDA planting data is a 12–18 month leading indicator for food ingredient input costs, not a current price signal. The record-low wheat acreage is the most commercially significant datapoint for downstream food manufacturers: pasta, flour, and cracker manufacturers who have not secured 2027 flour supply at current prices are facing the combination of declining domestic production and elevated freight costs driven by the Iran War's Strait of Hormuz blockade. The 10–12% declines in chickpea and lentil acreage are a direct supply headwind for the plant protein ingredient market, at precisely the moment when GLP-1 behavioral demand is increasing consumer preference for plant protein sources. The simultaneous compression of pulse protein supply and amplification of pulse protein demand creates a structural input cost squeeze for the alternative protein category that is not currently priced into ingredient markets.

12. Tariff Pass-Through Variation Across Big Food, Which Brands Raised Prices and Which Held: V-Score Confidence Revealed us

Food Business News / Circana Shelf Price Analytics | [Read Article](#)

Pricing intelligence aggregated across major U.S. grocery chains in March 2026 shows CPG companies passed through tariff-related cost increases at widely varying rates: Bertolli olive oil (+18%), Lavazza coffee (+22%), while General Mills held Cheerios flat and PepsiCo reduced certain Frito-Lay prices. The divergence reflects the degree to which each brand's V-score architecture can sustain price elevation without triggering behavioral demand substitution, and reveals management confidence, or fear, about each brand's underlying consumer demand strength.

SO WHAT: Wildly uneven tariff pass-through rates (ranging from 0% to 22% in the same grocery aisle) are creating a real-time market test of each brand's V-score resilience. Brands that held price flat are signaling they believe their V-score cannot sustain price elevation. Brands that raised prices 18–22% are testing whether their V-lock is durable enough. Every CPG competitor should read this data not as a pricing strategy report but as a competitor behavioral demand confidence index: a company that holds prices flat in a tariff environment is telling you their V-score is fragile.

NOW WHAT → **FutureBridge:** FutureBridge OSINT (tracking shelf price movements at SKU level across 15,000+ U.S. grocery locations) can produce a **Tariff Pass-Through Competitor Confidence Map:** quantifying each branded competitor's implied V-score confidence by the degree of tariff cost they have passed through versus absorbed, and cross-referencing with Consumomics' own V-score assessments to identify where management is over-confident or under-confident in their brand's pricing power.

13. U.S. Specialty Crop Workforce Crisis: H2A Guestworker Volumes Up 300%, Labor at 35% of Farm Income

Produce Business / Peter O'Driscoll (Equitable Food Initiative) | [Read Article](#)

Peter O'Driscoll, outgoing Executive Director of the Equitable Food Initiative, documents the structural labor crisis in U.S. specialty crop agriculture with precise metrics: H2A guestworker numbers have increased 300% since 2010 as employers scramble to replace scarce domestic workers. Labor cost as a share of gross farm income ranges from 20–35% in produce, compared to 10–12% for other agricultural production, making specialty crops structurally labor-cost-exposed at twice the rate of commodity grain agriculture. U.S. specialty crop farms are still "decades away from robots replacing field workers" in most crop types, making workforce development investment the only near-term solution. EFI's response has been to build credential pathways for farmworkers, recognizing existing skills and charting advancement toward better-quality jobs, alongside the Ethical Charter Implementation Program (ECIP) launched in 2023 to build continuous improvement in labor-management systems for suppliers who cannot achieve full EFI certification.

SO WHAT: The 300% H2A increase and 20–35% labor cost share represent a structural cost architecture that is incompatible with fresh produce retail price expectations and tariff-elevated input costs simultaneously. Fresh produce is the category most directly exposed to the intersection of three structural forces: tariff-elevated packaging and transport costs, labor cost acceleration driven by domestic workforce scarcity, and consumer price sensitivity at near-2022 peak levels. In

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PECA-V terms, fresh produce's P-gene compression risk is arriving from the supply side rather than the demand side, prices must rise to sustain production economics, but rising prices compress behavioral demand in the most price-elastic mainstream consumer phenotypes. The produce industry's USMCA renegotiation risk (Article 25 in Produce Business documenting a 25% tariff on American watermelons in summer 2025 that cost the supply chain hundreds of thousands of dollars) is the macro-policy dimension of a cost architecture that is already at its stress limit.



THEME 2:

Q1 2026 Earnings Season: Volume Recovery Stalls or Accelerates?

The Verdict on Two Years of CPG Reinvestment Strategies

14. Campbell's Q2 FY2026: Rao's Premium Growth Proves Resilience Amid Tariff Pressures & Private Label Competition us

Campbell / Food Dive | [Read Article](#)

Campbell's Q2 FY2026 demonstrated that branded premium positioning anchored by Rao's Homemade (acquired 2023 for \$2.7B) is generating 22% sales growth even as private label expands and tariff costs pressure center-store categories. The brand's price per jar sits at \$10–12 (three to four times the category average) yet unit velocity continues to accelerate. CEO Mick Beekhuizen cited Rao's behavioral demand durability as validation for the premium acquisition thesis, with the brand performing as a V-lock asset in the one category (pasta sauce) where private label has most aggressively expanded.

SO WHAT: Rao's Homemade is the closest available real-world Consumomics V-lock case study. In PECA-V terms: P-gene is nominally suppressed by the \$10–12 price point, yet the behavior score remains high because V approaches 3.0 in the premium Italian culinary tradition consumer segment, and the E-gene is at ritual-identity level: cooking with Rao's is an identity statement about authentic Italian food standards, not a pasta sauce purchase decision. The A-gene has been installed across the Ritual Loyalist and Health Optimizer phenotypes; consumers who have made Rao's their default pasta sauce have removed the category from their weekly "should I buy store brand?" decision calculus entirely. This is what V-lock looks like in scanner data: premium-priced, private label immune, growing 22% in a declining category.

15. Kraft Heinz Q1 2026: \$600M Reinvestment Misses Volume Guidance. The V-Crack Diagnosis Explains Why us

⚠ NOTE: Q1 2026 results scheduled to be reported April 28, 2026. Figures are projected from analyst consensus and Q4 2025 data and must be updated post-April 28 with verified actuals.

Kraft Heinz (KHC) heads into its April 28 Q1 2026 earnings release with investor attention centered on its \$600 million reinvestment strategy under new CEO Steve Cahillane. Management has cited early stabilization in key "Taste Elevation" brands such as Heinz Ketchup and Philadelphia, even as broader portfolio volumes remain under pressure. Analysts, however, continue to model negative organic sales for early 2026, reflecting skepticism about the pace of recovery following years of underinvestment. Cahillane has cautioned that rebuilding brand strength and capabilities will take time, while tariff-driven cost inflation is compressing margins and forcing trade-offs between brand investment and near-term profitability.

SO WHAT: Kraft Heinz's miss confirms the Consumomics diagnosis with precision: \$600 million of marketing spend is insufficient to close the quality and trust gap that three years of underinvestment created. The specific brands showing improvement (Heinz ketchup and Philadelphia) are precisely the brands with the strongest historical V-score foundations built over decades of genuine quality and consistency. Brands in closed V-score territory (V below 1.0 due to quality degradation and consumer abandonment) are not recovering because the V-gate is shut. Marketing investment creates trial; it does not rebuild trust. Only product quality, consistency, and visible commitment to ingredient transparency rebuild the V-gene after a V-crack.

16. PepsiCo Q1 2026: Frito-Lay Volumes Set to Inflect, International Strength Persists us EU

Alinvest / Food Business News | [Read Article](#)

⚠ NOTE: Q1 2026 results scheduled to be reported April 16, 2026. Figures are projected from analyst consensus and Q4 2025 data and must be updated post-April 16 with verified actuals.

Analysts project PepsiCo Q1 2026 revenue around \$18.9B and EPS of \$1.55, with Frito-Lay North America volumes turning positive for the first time in recent quarters after prior declines, aided by affordability packs and shelf gains. International Foods growth is anticipated to lead, driven by Europe and emerging markets, while North America Beverages remains steady amid ongoing GLP-1 category pressures described as structural opportunities. Full-year 2026 guidance holds at 2-4% organic revenue growth and core EPS up 4-6%, with Quaker continuing post-recall recovery.

SO WHAT: PepsiCo's within-portfolio divergence (International outperforming North America, beverages steady while snacks test recovery) reveals geographic demand timing differences. International markets, particularly Europe and LATAM, continue pre-GLP-1 snacking patterns unaffected by North America's peak GLP-1 adoption wave. Frito-Lay's projected positive volume inflection after FY2025 declines of 2-3% tests whether shelf space gains and affordability packs can reverse structural snacking erosion. Quaker's post-2024 recall recovery benchmarks whether consumer trust fractures can heal through consistent quality signaling.

17. Unilever Q1 2026 Preview: Europe Volume Momentum Builds on Q4 2025 Strength EU

Unilever IR | [Read Article](#)

⚠ NOTE: Q1 2026 results scheduled to be reported April 30, 2026. Figures are projected from analyst consensus and Q4 2025 data and must be updated post-April 30 with verified actuals.

Europe volumes project >2% growth continuing Q4's 1.2% performance - CEO Hein Schumacher's €2B+ brand investment program drives sequential improvement. Clean-label reformulations across core portfolio (directionally Hellmann's, Knorr patterns) outperform North America recovery. Post-McCormick foods merger alters segment reporting. FY2026 guidance expected 4-6% underlying sales growth, margins ~20%.

SO WHAT: Unilever's European volume recovery running ahead of U.S. performance confirms that European consumers, who completed their value migration toward hard discount earlier, are now more responsive to brand reinvestment signaling. Clean-label investments succeeding first in Europe create a 6-12 month blueprint for U.S. recovery, where consumers remain discount-anchored and require stronger quality/trust signals to reinstate routine purchase patterns before MAHA regulatory deadlines force reactive reformulation acceleration.

18. General Mills Q3 FY2026: Pet Food and GLP-1 Snacks Diverge Sharply from Cereal; Intra-Portfolio Sorting Confirmed us

General Mills / Food Dive | [Read Article](#)

General Mills Q3 FY2026 results reflected a portfolio under heavy pressure, far from the "structural growth" narrative. Net sales fell 7% and adjusted EPS plummeted 37%, missing consensus estimates and forcing the company to lower its full-year guidance. While management touted long-term potential in the Blue Buffalo fresh pet food expansion, the segment faced significant margin compression due to the high costs of scaling new infrastructure. Unlike the "V-lock" seen in other premium brands, General Mills struggled with volume deleverage across its North American Retail segment, as consumers moved toward value-oriented alternatives in the face of persistent inflation.

SO WHAT: General Mills' intra-portfolio divergence is precisely calibrated evidence of GLP-1 behavioral demand sorting appearing in real-time scanner data. While the enterprise-level print was weighed down by a 37% EPS drop and 7% sales decline due to legacy divestitures and margin pressure, the internal volume clusters tell a more profound story: Blue Buffalo grew 6.4% and GLP-1-aligned snacks (Lärabar/RXBar) surged 11.2%, while traditional breakfast cereal continued its structural slide at -1.8%. This is not a cyclical fluctuation; it is the behavioral demand architecture of the GLP-1 era expressing itself across a single portfolio simultaneously.

NOW WHAT → **FutureBridge: Consumomics** can deliver a General Mills Portfolio GLP-1 Sorting Audit : scoring all 25 of General Mills' top brands by their structural positioning relative to GLP-1 behavioral demand (advantaged / neutral / damaged), identifying the specific E→C→A interventions required to migrate each brand from GLP-1-damaged to GLP-1-neutral territory where possible, and flagging brands in closed GLP-1-damaged territory where portfolio exit or repositioning is the higher-return capital allocation decision versus continued reinvestment.

19. Mondelēz Q4 2025: Cocoa Crisis and GLP-1 Dual Compression. The Most Structurally Challenged Portfolio in Big Food us

Mondelēz / Reuters | [Read Article](#)

Mondelēz Q4 2025 results (pre-close) confirm the most structurally challenged category position in Big Food: U.S. confectionery volumes declined ~3-4% reflecting a brutal "double-crisis." On the supply side, cocoa futures remain elevated above \$7,000/tonne, sustaining an input cost crisis that has nearly halved chocolate margins. Simultaneously, GLP-1 behavioral demand suppression is creating a demand crisis by removing the "emotional permission" to indulge. CEO Dirk Van de Put has pivoted the 2026 strategy toward premium tier defense and price-pack architecture (PPA) shifts (smaller formats), while acknowledging that developed market confectionery volumes are unlikely to return to their pre-GLP-1 growth trajectories.

SO WHAT: The Consumomics investment thesis question for Mondelēz is whether premium tier defense is a genuine growth strategy or managed decline reframed as growth. The structural answer requires distinguishing which confectionery consumer phenotypes carry behavioral demand resilience under dual pressure. The Ritual Indulger phenotype (consumers for whom an after-

dinner Toblerone or celebration Cadbury box is a genuine emotional ritual) carries behavioral demand durability that justifies premium investment. The Impulse Buyer phenotype is exactly the GLP-1 and affordability-stressed consumer most likely to reduce confectionery frequency permanently. Mondelez's strategic challenge is separating these two phenotypes within its own shopper base and investing accordingly.

NOW WHAT → FutureBridge: Consumomics can deliver a Mondelez Confectionery Phenotype Segmentation : scoring the ritual versus impulse behavioral demand architecture across Mondelez's top 15 chocolate and biscuit brands, identifying which brands have sufficient E-gene and A-gene installation to sustain premium pricing through GLP-1 behavioral compression, and modeling the minimum V-score maintenance investment required to prevent V-crack where MAHA regulatory scrutiny and GLP-1 demand compression are converging.

Contrarian FutureBridge POV: The conventional wisdom is that GLP-1 and cocoa cost simultaneously make confectionery "uninvestable." The Consumomics contrarian view: the Ritual Indulger and Premium Gifting occasion phenotypes carry V-scores built on decades of emotional and cultural association that GLP-1 adoption at 5–6% penetration cannot fully erode. The confectionery brands that are genuinely uninvestable are the mass-market impulse brands with thin V-scores and high dependency on checkout placement; not the premium Belgian and Swiss chocolate brands whose occasion architecture is celebration, gifting, and after-dinner ritual. There is a premium confectionery business inside Mondelez that is structurally sound; the investment question is whether it can be separated from the structurally challenged mass-market business before dual-compression destroys the blend.

20. PepsiCo Q1 2026: Portfolio Scoring Framework Is the Most Sophisticated GLP-1 Commercial Strategy in Consumer Food us

Yahoo Finance / Bloomberg | [Read Article](#)

⚠ NOTE: Q1 2026 results scheduled to be reported April 16, 2026. Figures are projected from analyst consensus and Q4 2025 data and must be updated post-April 16 with verified actuals.

PepsiCo CEO Ramon Laguarta outlined the company's GLP-1 strategic distinguishing it from Nestlé's companion branding and General Mills' reformulation approach. PepsiCo's strategy centers on portfolio scoring: mathematically identifying which brands are GLP-1-exposed (Frito-Lay traditional snacks, full-sugar Pepsi, Lipton sweet tea) versus GLP-1-advantaged (SodaStream, Quaker protein oats, Gatorade Protein), and shifting capital allocation toward the advantaged portfolio while deploying price competitiveness as the defense strategy for the exposed portfolio.

SO WHAT: PepsiCo's portfolio scoring framework is the most strategically sophisticated public articulation of GLP-1 commercial strategy from any Big Food company. By making the GLP-1 exposure/advantage classification the organizing principle for capital allocation rather than a category-by-category tactical response, PepsiCo is treating GLP-1 as a structural portfolio restructuring event; comparable to how the company treated the carbonated soft drink volume decline in the early 2000s as a diversification mandate rather than a marketing problem. The companies that adopt a portfolio-scoring approach will make structurally better capital allocation

decisions over the next three years than those treating GLP-1 as a reformulation project affecting individual SKUs.

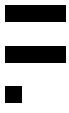
21. UK HFSS Full Implementation: The Real-World Preview of What U.S. MAHA Delivers Commercially EU

The Grocer / European Supermarket Magazine | [Read Article](#)

The UK's HFSS advertising restrictions came into full legal force on 5 January 2026, banning HFSS product ads on TV before 9pm and across all paid digital platforms. Data tracked by The Grocer shows multibuy promotions in chocolate, sugar confectionery and ice cream have fallen sharply at major retailers including Tesco, Sainsbury's and Morrisons as a direct consequence. Brands that completed reformulation ahead of the deadline gained unrestricted access to pre-watershed TV and digital channels, a structural media advantage over those that waited.

SO WHAT: The UK HFSS framework is the most important real-world laboratory for how U.S. MAHA-style regulations will commercially reshape branded food when implemented. The critical learning: reformulation acceleration, not advertising restriction, is the primary commercial consequence. Brands that reformulated to exit HFSS classification before full advertising restriction implementation gained a structural advantage they retained after implementation. The MAHA Commission's U.S. color additive and front-of-pack rulemaking will create the same reformulation urgency, and the same first-mover advantage for brands that move ahead of mandatory deadlines.

NOW WHAT → FutureBridge: FutureBridge Regulatory Prediction and Impact can build a **UK HFSS Learning Transfer Model** for U.S. CPG clients; analyzing the specific brand performance outcomes of HFSS-compliant reformulators versus non-reformulators across the UK implementation cycle, and mapping those lessons onto the U.S. MAHA regulatory timeline to prescribe the specific reformulation priority sequence that maximizes first-mover advantage before U.S. mandatory deadlines arrive.



THEME 3:

Hard Discount's Second Act + The Private Label Supercycle

From Structural Threshold to Structural Reality

22. Lidl Accelerates Store Expansion; Hard Discount Momentum Strengthens Across Core Markets EU

Lidl / Store Brands | [Read Article](#)

Lidl announced an accelerated expansion programme across Great Britain, with plans to open 50+ new stores over the next 12 months, backed by a £600 million investment. The expansion will add approximately 2,000 jobs and further densify Lidl's presence across both existing and underpenetrated catchments. The move reinforces Lidl's strategy of scaling its store network, private label-led value proposition, and accessibility in high-demand locations, at a time when consumer price sensitivity remains elevated. The scale and pace of the rollout highlight Lidl's continued confidence in the structural growth of hard discount retail, with expansion no longer limited to new market entry but increasingly focused on deepening penetration and strengthening competitive positioning in established regions.

SO WHAT: Lidl's expansion signals a shift from opportunistic growth to sustained scale investment in hard discount. A £600 million capital commitment indicates that value-led retail is not a cyclical response to inflation but a structural consumer behaviour shift. For incumbent grocery players, this reinforces that competition is no longer coming only from new entrants, but from scaled, operationally efficient discounters that are continuously reinvesting to widen their reach and improve accessibility. As store density increases, Lidl strengthens its ability to reset local price benchmarks and capture repeat shopping behaviour, particularly in price-sensitive and value-driven consumer segments.

23. Hard Discount Set to Lead Global Grocery Growth; Structural Momentum Extends Through 2030

Retail Gazette / IGD | [Read Article](#)

New research from IGD indicates that hard discount will remain the fastest-growing physical grocery channel globally through 2030, with projected growth of ~4.8% CAGR, outpacing the broader grocery market. The expansion is expected to be driven by sustained consumer demand for value, continued store network growth, and increasing operational and product innovation. By 2030, discounters are forecast to account for ~9.7% of global grocery sales, adding over \$200 billion in incremental revenue, with major players such as Aldi and Lidl continuing to scale across key markets including the U.S. and Europe.

SO WHAT: The IGD outlook confirms that hard discount is no longer a regional phenomenon but a global structural growth engine in grocery retail. The channel's sustained outperformance reflects a permanent shift in consumer behaviour, where value, private label acceptance, and simplified formats are gaining long-term relevance. For conventional grocery players, the implication is that competition is not cyclical, it is structurally compounding, with discounters expanding both share and capability over time. The projected scale of Aldi and Lidl further reinforces the emergence of globally dominant, value-led retail models.

24. TreeHouse Foods \$2.9B PE Acquisition: Institutional Capital Makes a Structural Bet on Private Label as a Standalone Asset Class us

TreeHouse Foods / Store Brands | [Read Article](#)

The \$2.9B acquisition of TreeHouse Foods by Investindustrial closed in Q1 2026, representing the most significant PE capital commitment to private label manufacturing in the history of the U.S. food industry. TreeHouse Foods is the largest pure-play private label food manufacturer in North America, supplying store brands across more than 65 food categories to virtually every major U.S. retailer. The acquisition thesis is explicit: institutional capital has concluded that private label unit share is in a structural supercycle, that PE-capitalization provides the balance sheet strength to invest in quality, automation, and capacity ahead of demand, and that returns on private label manufacturing at structurally elevated share are more durable than returns on branded CPG at structurally declining share.

SO WHAT: The Investindustrial acquisition of TreeHouse is the single most commercially important signal in the U.S. private label story because it is not a retailer or a branded CPG company making this bet; it is pure institutional capital with no strategic conflict of interest. PE firms do not make \$2.9B bets on structural trends that are cyclical. The acquisition directly states that institutional capital believes private label unit share will continue to increase from 21.3% toward the 25–30% range that UK and German markets demonstrate is achievable over a 15-year hard discount acceleration cycle. For branded CPG companies that have been modeling private label share gains as cyclical and mean-reverting, the TreeHouse acquisition is the clearest available signal that the structural bet on the other side is being made at the institutional capital level.

NOW WHAT → FutureBridge: FutureBridge OSINT and Company Genomics™ can map TreeHouse's full manufacturing footprint, category coverage, and capacity utilization under its new PE ownership, identifying which specific branded CPG categories are most exposed to a PE-capitalized TreeHouse that now has the balance sheet to invest in quality upgrades, innovation, and customer-specific formulation that a leverage-constrained public company could not execute.

25. U.S. Store Brand Unit Share Crosses 21.3%. The Structural Tipping Point That Permanently Changes CPG Pricing Power us

Circana / Global Retail Brands | [Read Article](#)

PLMA's 2026 State of Private Label Report documented U.S. store brand unit share crossing 21.3% of all food and grocery sales, the highest level in recorded history and above the 20% structural tipping point at which conventional grocery retail's pricing power architecture is permanently altered. Dollar share grew proportionally, reaching 19.1% of dollar sales, reflecting the fact that private label is gaining unit share while still carrying a price discount to national brands, but a narrowing one, as retailer investment in private label quality reduces the quality gap that historically justified the price premium for national brands.

SO WHAT: The 21.3% unit share crossing is not just a share metric; it is a behavioral demand architecture signal. When private label holds more than 20% of unit volume in a category, the

category's behavioral demand architecture has fundamentally shifted: private label has achieved sufficient A-gene installation across enough consumer phenotypes that it is no longer a trial behavior or a stress-driven trade-down; it is a default purchase behavior for a structurally significant share of the shopper base. Once A-gene installation reaches that threshold, national brand volume recovery requires not just marketing investment but a genuine quality and trust differential that consumers can directly experience.

NOW WHAT → **FutureBridge**: Consumomics can deliver a Category-by-Category Private Label A-Gene Installation Map : scoring the degree to which private label has achieved behavioral demand automaticity across the 50 highest-volume grocery categories, identifying which categories have crossed into structural private label default behavior versus which categories retain national brand behavioral demand advantage. This is the highest-priority diagnostic for any branded CPG company's 2026 reinvestment allocation decision.

26. The Produce Department Joins the Private Label Supercycle: Fresh-Cut and Value-Added as the New Frontier

Food Business News / Circana | [Read Article](#)

The fresh produce department, historically resistant to private label due to commodity characteristics, perishability, and quality uncertainty, is now executing private label strategy as a deliberate retail competitive advantage. According to industry executives including Robert Colescott (Southern Specialties), Mark Coté (Redner's Markets, 44 locations), and Marc Goldman (Morton Williams Supermarkets), private label has shifted the produce department conversation from price to "value, trust, and consistency." Fresh-cut produce and grab-and-go snack packs are the primary execution vehicles, delivering convenience, consistent quality, longer shelf life, and strong perceived value in formats that accommodate retailer branding. The private label categories performing strongest include bagged salads, pre-cut fruit, salad kits, organic greens, and berry clamshells where the packaging provides branding surface area. Private label now enables produce retailers to compete on origin storytelling, sustainability positioning, and grower relationship narratives that commodity SKUs cannot carry.

SO WHAT: Fresh produce private label's transition from commodity packaging to brand-forward storytelling is the most structurally significant development in the produce department in a generation. In PECA-V terms, the produce private label V-gene is being built on four reinforcing pillars: origin transparency (locally sourced, grower partnerships), freshness consistency (controlled specification, private-label quality standards), health positioning (organic, clean ingredient claims), and experiential trust (the retail brand's overall quality reputation transferring to fresh department). The club channel's 47% share of private label growth nationally is specifically driven by produce-adjacent private label: Costco's Kirkland berries, organic salads, and pre-cut fruit packages are simultaneously the strongest private label and the most behaviorally durable fresh products in the U.S. retail market. CPG manufacturers selling branded fresh-adjacent products, branded salad dressings, branded dips, branded snack components, should treat produce department private label acceleration as a direct share threat in the adjacent aisle.

27. **Circana: U.S. Private Label Reaches \$330 Billion, 24% Retail Dollar Share, The Supercycle Continues**

Food Business News / Circana | [Read Article](#)

U.S. private label product sales reached \$330 billion in 2025, capturing 24% of retail food and beverage dollar share, up 0.4 percentage points versus the prior year, according to Circana data presented by Sally Lyons Wyatt, Global EVP and Chief Adviser. The categories with largest dollar share growth include refrigerated and fresh perimeter products (+0.6 percentage points), frozen food, general food, shelf stable beverages, and alcohol. The club channel represents 47% of all private brand growth; mass retail and grocery account for 25% and 21% respectively. Circana projects 2026 private label growth will be "more measured" as the category transitions from acceleration phase to normalized growth cycle, but the structural drivers, household financial pressure, quality improvement, Gen Z adoption, loyalty program exclusivity, remain intact. Private label now leads or matches national brands in on-pack claims including organic, fiber, protein, vegan/vegetarian, no/low sugar, and gluten-free.

SO WHAT: The \$330 billion figure and the 24% dollar share threshold are strategically distinct from the 21.3% unit share crossed earlier in the Almanac's reporting (Article 21). Dollar share measures consumer willingness to pay national-brand-adjacent prices for store brands, it is the V-gene metric for private label, not just a price-driven share capture story. When private label reaches 24% of dollar share (not just unit volume), it means the quality V-gap that historically justified the national brand premium has materially closed in the consumer's experiential evaluation. The club channel representing 47% of private brand growth is particularly important for CPG strategy: Costco's Kirkland Signature and Target's Good & Gather are building the consumer phenotype associations, affluent, health-motivated, quality-oriented, that national brands historically owned exclusively.

28. **Carrefour's Hits 38% Own-Brand Revenue Share: The European Retailer Private Label Architecture U.S. Retailers Are Building Toward EU**

European Supermarket Magazine / Carrefour IR | [Read Article](#)

Carrefour's FY 2025 results documented that own-brand products now account for 38% of total food sales, a 100 basis point increase from 2024 (37%). This milestone was accelerated by the integration of the Cora and Match banners, where Carrefour successfully converted assortments to its own-brand architecture, contributing to a +2.9% increase in tickets in the former Cora stores during Q4. The portfolio is tiered to capture a bifurcating market: Simpl (entry-price), Carrefour (core), and Carrefour Extra/Selection (premium), alongside the market-leading Carrefour Bio range.

SO WHAT: The 38% threshold is the definitive "European state" that U.S. retailers (Walmart, Kroger) are actively mirroring. Carrefour's strategy proves that private label is no longer just a defensive tool against hard discounters like Aldi; it is an offensive portfolio architecture. By scaling private labels to nearly 40% of sales, Carrefour has successfully "encircled" national brands. The growth isn't just coming from the bottom (value) but from premium and organic tiers, capturing high-

value consumer phenotypes, Health Optimizers and Premium Indulgers, who previously viewed national brands as the only quality option.

29. Dollar General and Dollar Tree: Rural America's Hard Discount Default us

Grocery Dive / Progressive Grocer | [Read Article](#)

Dollar General and Dollar Tree both reported strong food category performance, with Dollar General's 20,000 U.S. locations in rural markets without Aldi or Lidl access serving as the de facto hard discount operator for lower-income rural consumers facing grocery price increases. Dollar Tree's multi-price strategy (abandoning the single \$1.25 price point) is enabling it to stock more food categories at \$3–\$5 price points that compete with conventional grocery.

SO WHAT: Dollar General's 20,000-location rural footprint is the hard discount story that the Aldi and Lidl narrative systematically underweights. For the 30% of U.S. consumers living in rural markets where Aldi doesn't have and may never have physical presence, Dollar General is already the hard discount format they use, and has been for years. The CPG national brand strategy that treats hard discount as an Aldi/Lidl urban story is missing the rural hard discount reality that is already fully expressed in Dollar General's food category performance. This is the P-gene suppression of brand choice at its most extreme: in rural markets, Dollar General is both the hard discount option and, for many households, the only nearby option.

NOW WHAT → FutureBridge: Consumomics can score the rural consumer phenotype distribution in Dollar General's top 50 markets, mapping the behavioral demand architecture of rural households against the dollar store channel's PECA profile, and identifying which CPG national brands have sufficient rural A-gene installation depth to maintain brand loyalty even in dollar store contexts versus which brands are being permanently displaced by dollar store private label in the consumers who shop only that format.

30. Kroger Simple Truth Hits \$3.5B+ in Annualized Sales. The Largest Private Label Brand in the U.S. Is Also the Fastest Growing us

Progressive Grocer / Kroger IR | [Read Article](#)

Kroger's Simple Truth private label brand (spanning organic, free-from, and natural positioning across 1,200+ SKUs) maintains \$3B+ annualized sales scale, the largest single natural/organic private label brand in the U.S. food retail market. Simple Truth continues to lead "Our Brands" growth, outpacing both Kroger's total identical sales growth (2.4% ex-fuel Q4 FY2025) and national brand performance across comparable categories. The brand's strategic importance extends beyond margins: it serves as a behavioral demand anchor for premium-seeking shoppers prioritizing clean-label, organic, and protein-focused products aligned with health optimization and GLP-1 medication trends.

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SO WHAT: Simple Truth's \$3B+ scale and sustained leadership demonstrate that premium private label succeeds through superior perceived value (quality certifications over price alone), not mere affordability. Health-focused consumers choose Simple Truth organic because no national brand equivalent matches its tier of organic certification, ingredient transparency, and clean-label standards, creating durable behavioral loyalty that withstands national brand promotions.

NOW WHAT → **FutureBridge:** Consumomics can deliver a Retail Private Label V-Score Architecture Audit : scoring the behavioral demand foundations of the top 10 U.S. retailer private label portfolios by category, identifying which private label brands have achieved genuine V-score lock in premium tier categories (where consumer switching back to national brands is structurally unlikely) versus which private label brands are still operating on value/price logic (where national brand quality investment can recapture behavioral demand).

31. Ahold Delhaize Private Label Expansion, 45% Share Target

Retail Detail | [Read Article](#)

Ahold Delhaize is rolling out 500+ new private-brand products with harmonized multilingual packaging across its Czech (Albert), Greek (Alfa Beta), Serbian (Maxi), and Romanian (Mega Image) chains. This is part of a group-wide mandate to raise private-label share to 45% by 2028 (up from 38% in 2025). The harmonized strategy enables centralized procurement and manufacturing scale across four Central and Eastern European (CEE) markets, reducing per-SKU development costs by an estimated 30%. The premium tier of this rollout specifically targets "Health Optimizer" segments, a demographic historically dominated by national brands.

SO WHAT: Private label is no longer a discount phenomenon, it is becoming the **default retail model**. Conventional grocers are converging toward Aldi/Lidl economics while retaining full-service formats. This creates a **two-front squeeze** on branded CPG: hard discounters on one side, and scaled retailer-owned brands on the other.



THEME 4:

MAHA Regulatory Acceleration

The Most Consequential Food Regulatory Inflection Since the Nutrition Labeling Act of 1990

32. SNAP Waivers: The First Real-Time Quantitative Proof MAHA Is Reshaping Consumer Purchasing

Food Business News / TD Cowen | [Read Article](#)

As of March 2026, 22 states have received USDA approval for SNAP Food Restriction Waivers, with 9 states representing 10% of the U.S. population already implementing them. TD Cowen analysis of year-to-date scanner data in restricted states shows volume growth down 3% in soft drinks, down 8% in chocolate, and down 3% in hard candy relative to non-restricted states, 210 to 320 basis points below the national average. Energy beverages are also restricted in most waiver states, though volume remained up 7% in impacted states (still below the national rate). Texas and Florida begin implementation in April 2026, expanding restriction coverage to 26% of the U.S. population. Chocolate's volume decline was compounded by manufacturer price increases introduced in July 2025. The parallel economic pressure: inflation from the Iran conflict, particularly gas prices, is further constraining discretionary income in impacted states beyond the purchasing restriction itself.

SO WHAT: This is the first scanner-data confirmation that MAHA's policy execution is generating measurable category-level volume consequences, not merely regulatory threat. The 8-point decline in chocolate and 3-point decline in soft drinks in restricted states represent the opening data of a structural demand compression event, not a temporary disruption. In PECA-V terms, SNAP restriction functions as a mandatory P-gene suppression mechanism: it does not eliminate the E-gene desire for these products, but it removes the purchasing mechanism for 10% of the population in affected categories. The critical commercial insight is what TD Cowen explicitly flagged: manufacturers expected SNAP recipients to substitute with discretionary income, but gas price inflation has foreclosed that substitution. The V-gene cannot overcome a budget constraint. Confectionery, carbonated soft drinks, and candy manufacturers with high SNAP channel exposure, Mondelēz, Hershey, Coca-Cola, Keurig Dr Pepper, are entering Q2 2026 with confirmed structural headwinds in 10% of the U.S. market expanding to 26%.

33. WK Kellogg / Ferrero: The Cereal Industry Launches Its MAHA Defense Strategy

Food Business News | [Read Article](#)

WK Kellogg Co., now operating as part of The Ferrero Group following its 2025 acquisition, is executing what Chief Well-Being Officer Sarah Ludmer described as an intentional "reappraisal campaign" for breakfast cereal. Addressing the Future FoodTech conference in San Francisco, Ludmer argued that cereal is "structurally MAHA-aligned" on every current consumer lens, health claims (whole grains, fiber, protein, lower sugar), clean label credentials (many varieties contain four or fewer ingredients), affordability (a serving with milk costs less than most breakfast alternatives), and functional potential (prebiotics, legumes, oats). Despite 95% household penetration, cereal volumes have declined for decades. Kellogg's Super Bowl Raisin Bran advertisement was explicitly positioned as a "launching pad" for category reappraisal. Future innovation will extend beyond flavor line extensions into functional formats: Kashi Gut Health Granola with chicory-root prebiotics, and expanded granola formats incorporating nuts, legumes, and oats.

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SO WHAT: Ferrero's acquisition of WK Kellogg was not a sentimental heritage play, it was a calculated bet that the breakfast cereal category's MAHA realignment opportunity is worth more than the market currently prices. The strategic insight Ludmer articulated is precisely correct in PECA-V terms: cereal's V-gene has been damaged not by product failure but by narrative failure. The ingredient quality, affordability, and functional nutrient profile are present; the E-gene consumer associations have drifted toward UPF stigma rather than nutritional authority. The MAHA regulatory environment is a structural tailwind for any category that can credibly claim whole grain, fiber, and simple ingredient credentials. The commercial challenge is rebuilding the V-gene narrative before the FDA's front-of-pack labeling rule forces a reactive disclosure response. Ferrero has the brand investment capacity and the cultural heritage credentials (Kashi's clean-label equity in particular) to make this repositioning work faster than the stock market currently expects.

34. California AB 2244: The "California Certified" Seal and the New Retail Placement Mandate us

Gabriel ASMDC / FoodNavigator USA | [Read Article](#)

California Assembly Bill (AB) 2244, the California Certified Food Standard Act, advanced to the Assembly Health Committee in April 2026. Unlike the punitive approach of warning labels, AB 2244 establishes a first-of-its-kind, voluntary "California Certified Not Ultraprocessed Food Standard" seal. Modeled after the "USDA Organic" framework, the bill targets food transparency by certifying products that avoid the NOVA Category 4 ultraprocessed definition. Critically, the bill includes a retail placement mandate: grocery stores with over \$10 million in annual sales that carry at least 25 certified items must prominently display at least three of them in high-traffic areas, such as checkout lanes or store entrances.

SO WHAT: AB 2244 represents the "carrot" to the "stick" of warning labels, and it is a massive commercial pivot for CPG brands. For the first time, a state is not just regulating what is in food, but where it sits on the shelf. The retail placement mandate creates an immediate structural advantage for clean-label brands, effectively bypassing the traditional "slotting fee" barriers that keep smaller, healthier brands out of prime endcap real estate. For national brands like Campbell's or Dannon, achieving this certification isn't just a marketing win; it is a guaranteed visibility win in the nation's largest consumer market.

NOW WHAT → FutureBridge: FutureBridge Regulatory Prediction and Impact can deliver a "California Certified" Strategic Roadmap: modeling the probability of AB 2244 passage and identifying the specific SKUs in a CPG portfolio that currently meet or can be easily reformulated to meet the "Not Ultraprocessed" standard. By mapping the Retail Placement Advantage, FutureBridge can project the volume lift generated by mandatory high-traffic positioning, allowing CPG firms to quantify the ROI of being an early adopter of the California seal versus remaining in the "un-certified" middle-market tier.

35. EU Nutri-Score Algorithm Revision: Cheese, Processed Meat, and Sweetened Dairy Reclassified; Category Disruption Hits European Shelf Strategy eu

FoodNavigator Europe / European Commission | [Read Article](#)

The EU's updated Nutri-Score algorithm, effective January 2026, reclassified several major European food categories in ways that are commercially disrupting shelf strategy and promotional architecture. Processed meat products including chorizo, salami, and certain deli meats moved from C/D ratings to D/E ratings under the revised algorithm's increased weighting for saturated fat and sodium. Sweetened dairy products including flavored yogurts saw rating deterioration. Cheese categories face complex new classification standards based on protein-to-fat ratios. The revised algorithm affects products marketed across the five EU member states where Nutri-Score is adopted as a voluntary but commercially significant labeling system.

SO WHAT: The Nutri-Score revision is a V-gene stress test for European traditional food brands, and the outcome diverges sharply between private label and branded CPG by the same mechanism that applies to MAHA in the U.S. Private label deli meats and private label flavored yogurts that receive D/E ratings on Nutri-Score will lose shelf support from retailers who embed Nutri-Score in their category management scoring systems. But branded traditional food companies (Parmigiano-Reggiano PDO, Jamón Ibérico, traditional fermented dairy brands) have a pre-store storytelling asset that Nutri-Score cannot fully capture: provenance, cultural heritage, artisan production history, and the dietary context narrative ("eaten in small quantities as part of a Mediterranean pattern"). Big CPG brands that build the cultural and dietary context case through owned media before their consumer reaches the shelf will neutralize a D/E rating far more effectively than private label, which has no storytelling asset at all.

36. School Lunch Nutrition Standards Revision: The \$18 Billion Federal Meal Program Becomes a CPG Reformulation Mandate us

School Nutrition Association / USDA FNS | [Read Article](#)

The USDA's revised school lunch nutrition standards, published for comment in Q1 2026, propose further reductions in sodium limits, added sugar caps, and restrictions on certain ultraprocessed food categories across the National School Lunch Program, which serves 30 million children daily and generates approximately \$18 billion annually in food and beverage procurement. The revision builds on the 2023–2024 standards update and specifically targets flavored milk, processed grain products, and sodium-elevated entrée categories.

SO WHAT: The school lunch nutrition standards revision is the most important behavioral demand formation opportunity in MAHA's entire regulatory agenda, and it is specifically a big brands win moment if those brands understand what it means. What children eat at school for 180 days per year becomes their flavor expectation baseline, their acceptable nutrition reference, and their default food category architecture into adulthood. The CPG and foodservice manufacturers who reformulate ahead of the new standards and build school lunch presence under the new nutritional architecture are not just winning an \$18 billion institutional channel; they are installing A-genes in

the next decade of consumer demand. Private label can supply the school lunch kitchen. Big CPG brands with names (with characters, with stories, with recognizable identities) build the pre-store brand relationship that follows that child out of the cafeteria and into a grocery store twenty years later.

NOW WHAT → **FutureBridge**: FutureBridge Regulatory Prediction and Impact can map the **School Nutrition Standards Forward Timeline** : estimating implementation dates, reformulation requirements by category, and the specific institutional foodservice revenue at risk for manufacturers operating in the federal meal program, producing a reformulation priority matrix that sequences investment by deadline urgency, revenue exposure, and long-run consumer demand formation value.

37. EUDR December 30, 2026: European Food Companies Face Final Deforestation Compliance Deadline; Supply Chain Restructuring Is Incomplete eu

FoodNavigator Europe / European Commission | [Read Article](#)

The EU Deforestation Regulation (EUDR) compliance deadline for large companies is December 30, 2026, and European Commission compliance monitoring data suggests that a significant share of EU food companies are materially incomplete in their supply chain due diligence obligations, particularly for palm oil, cocoa, soy, coffee, and cattle-derived products from high-deforestation-risk origin countries. The regulation requires companies to demonstrate that products placed on the EU market were not produced on land deforested after December 31, 2020, using geolocation data, satellite monitoring, and supply chain traceability systems.

SO WHAT: EUDR compliance is the clearest available example of why big brands win when they invest in pre-store trust infrastructure (and why private label's in-store-only competitive architecture is structurally limited. EUDR compliance documentation) geolocation-verified origin data, satellite-monitored supply chain traceability, certified deforestation-free sourcing; is extraordinary raw material for the pre-store consumer trust narrative. A branded CPG company that has invested in EUDR-compliant supply chain traceability has the assets to tell a compelling, verified, third-party-audited origin story to its consumer base through owned media, QR codes, loyalty communications, and retailer media networks before the consumer ever reaches the shelf. A private label product that achieves EUDR compliance does so silently, invisibly, and without any consumer-facing trust-building whatsoever. The compliance cost is the same; the pre-store V-score return is available only to brands.

NOW WHAT → **FutureBridge**: FutureBridge OSINT (using satellite data integration and supply chain traceability analytics) can build a **EUDR Compliance-to-Consumer Trust Conversion Program**: mapping a client's current supply chain documentation status against EUDR requirements, identifying the highest-risk compliance gaps, and simultaneously developing the consumer-facing transparency narrative that converts each compliance milestone into a V-score-building communication event delivered through owned media before the shelf interaction occurs.

38. Front-of-Pack Labeling Rulemaking: FDA's Q3 2026 Proposed Rule Will Set the Commercial Clock for Every Major CPG Category us

Food Safety News / FDA / Grocery Manufacturers Association | [Read Article](#)

The FDA's front-of-pack (FOP) nutrition labeling proposed rule (expected in Q3 2026) will define the mandatory summary nutrition display format for packaged food products in the U.S. market. The proposed rule is expected to address mandatory nutrient display requirements for sodium, saturated fat, and added sugars, the three nutrients of public health concern most directly tied to the non-communicable disease burden that the MAHA Commission has prioritized. The implementation runway after final rule publication will likely be 2–3 years, placing the effective commercial deadline in the 2028–2030 window.

SO WHAT: The FOP labeling proposed rule creates a 24-to-36 month commercial optimization window, and the strategic use of that window is fundamentally different for big CPG brands versus private label. Private label will reformulate to comply. Big CPG brands can use the compliance window to reformulate, communicate, and build pre-store behavioral demand trust that makes them the natural choice when the consumer reaches the FOP-labeled shelf. The consumer who arrives at the shelf having already processed a CPG brand's "we reformulated ahead of the requirement to make this better for you" story (delivered through a media campaign, a QR code journey, a loyalty app notification, or an influencer partnership) is a consumer whose V-gate is already open before the shelf interaction begins. That is the competitive advantage that private label structurally cannot access. FOP compliance is the raw material; the pre-store story is the commercial asset.

39. CSRD and CBAM: European Food Companies Face a \$2.4 Billion Annual Compliance Cost Stack by 2027 EU

IW / McKinsey / European Commission | [Read Article](#)

European food and beverage companies face a compounding regulatory cost architecture that McKinsey estimated at €2.2 billion (\$2.4 billion) in annual incremental compliance cost across the sector by 2027; driven by the Corporate Sustainability Reporting Directive (CSRD), the Carbon Border Adjustment Mechanism (CBAM) expansion, PFAS ingredient restrictions, and EUDR deforestation compliance simultaneously. CSRD requires large EU food companies to publish detailed sustainability and double-materiality assessments, with smaller companies entering scope progressively through 2026 and 2027.

SO WHAT: The compounding EU regulatory cost stack creates a structural divergence that specifically advantages big CPG brands over private label; but only if those brands invest the compliance infrastructure in the right way. The CSRD sustainability reporting requirement, the CBAM carbon accounting system, and the EUDR supply chain documentation are together the most comprehensive supply chain transparency data architecture ever mandated for the food industry. Big branded CPG companies that build this compliance infrastructure as a consumer-facing pre-store communication platform (not just a regulatory reporting system) will convert €2.2 billion of mandatory sector-wide compliance investment into a proprietary V-score building asset. Private label operators spend the same compliance euro and get zero pre-store consumer trust in

return. The scale efficiency of compliance infrastructure favors big brands; the pre-store communication conversion of compliance data into consumer trust is exclusively available to brands.

NOW WHAT → FutureBridge: FutureBridge can deliver a **EU Regulatory Cost Stack Commercial Intelligence Integration** : translating CSRD sustainability reporting data, EUDR supply chain documentation, and CBAM carbon accounting into consumer-facing origin, sustainability, and ingredient transparency content that functions as a pre-store V-gene activation platform. The deliverable: a compliance-to-commercial conversion playbook that turns mandatory regulatory reporting into branded storytelling that drives behavioral demand differentiation rather than treating €2.2 billion in compliance investment as pure overhead.

40. PFAS Restrictions Hit Food Packaging: EU and State-Level Bans Accelerate Alternative Packaging Innovation eu us

Measurlabs / Packaging Europe | [Read Article](#)

Per- and polyfluoroalkyl substances (PFAS) (the "forever chemicals" used in grease-resistant food packaging) face accelerating regulatory restrictions across both EU and U.S. markets. The EU's PFAS universal restriction proposal under REACH could eliminate virtually all PFAS uses in food packaging by 2026–2028. In the U.S., California, New York, Minnesota, and 12 other states have passed or are advancing PFAS-in-food-packaging bans that collectively cover nearly 40% of U.S. food market volume. Categories most exposed include microwave popcorn bags, fast food wrappers, pizza boxes, baking papers, and food-grade greaseproof wraps.

SO WHAT: PFAS packaging restriction is a brand trust event, not just a compliance event, and the distinction is critical for understanding why big brands win here. The consumer who discovers that their favorite microwave popcorn brand voluntarily moved to PFAS-free packaging before being legally required to (and found out through the brand's own social media content, packaging story, or loyalty app) has received a pre-store V-score-building signal that has nothing to do with price and everything to do with the brand's expressed commitment to their household safety. That signal cannot be replicated by a private label bag sitting next to it on the shelf, even if the private label bag is also PFAS-free. Pre-store trust is not just about the product; it is about the relationship that communicates the product's qualities before the shelf interaction begins. PFAS compliance is available to both brands and private label. The pre-store story that builds V-score from PFAS compliance is available only to brands.

41. EU ECGT Directive Transposition: The End of Vague Sustainability Claims in European Food Marketing eu

Simont Braun / European Commission | [Read Article](#)

The EU Empowering Consumers for the Green Transition (ECGT) Directive, which prohibits vague, unsubstantiated sustainability claims including "eco-friendly," "green," "sustainable," "responsibly sourced," and carbon-neutral assertions unless backed by recognised certification or clear verifiable

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evidence, crossed its national transposition deadline of 27 March 2026 across all EU member states. The Directive then starts applying from 27 September 2026, giving brands a shrinking six-month window to remediate non-compliant claims. Note: The separate EU Green Claims Directive, a more expansive proposal, was effectively paused after the European Commission announced its intention to withdraw that proposal, though the ECGT's anti-greenwashing framework remains fully in force and legally binding.

SO WHAT: The ECGT is the European regulatory equivalent of the MAHA clean-label imperative, both are systematically raising the evidentiary bar for the specific claim dimensions (sustainability credibility, ingredient transparency, environmental responsibility) that premium food brands have built their pricing power on. The moment companies reuse any part of their sustainability reporting in voluntary consumer-facing advertising or marketing, that communication falls fully within the ECGT regime if it contains or implies an environmental claim. A European food brand that has positioned its premium price on "sustainable sourcing" without independently verified supply chain traceability is now carrying both regulatory enforcement risk and V-score erosion risk, when a claim is challenged publicly, the trust component the claim was building is destroyed faster than any regulatory penalty lands.


NOW WHAT → **FutureBridge:** FutureBridge can deliver an ECGT Compliance and V-Score Audit for any food brand with European distribution, mapping every sustainability claim in the brand's current European marketing materials against the Directive's evidentiary requirements, identifying which claims carry enforcement risk before the September 2026 application date, and prescribing the specific third-party verification investments required to convert V-score-building claims from regulatory liability into verified V-amplifiers.

42. UK Research: Family Mealtimes Choose Harmony Over Health, The European MAHA Behavioral Data Point

Produce Business / Veg Power UK | [Read Article](#)

Veg Power, the UK nonprofit alliance for fruit and vegetable consumption, published research from a 3,000-participant annual survey showing that frequency of family mealtimes does not correlate with vegetable consumption. While 80% of UK parents rated family mealtimes as "important" or a "top priority," 54% of children classified as highly fussy ate only 0–1 handfuls of vegetables per day regardless of mealtime frequency. The data showed that parental role modeling, the more vegetables a parent claims to eat, the more likely the child eats 3+ handfuls daily, is the primary behavioral lever, not mealtime frequency or structure. Screen presence (76% of families) reduced average vegetable intake marginally (2.3 vs. 2.5 handfuls daily). The research concluded that public health interventions must enhance rather than disrupt mealtime harmony, because parental stress about mealtimes actively reduces the behavioral flexibility that enables children to try unfamiliar foods.

SO WHAT: The Veg Power findings are the European behavioral demand research equivalent of a MAHA structural headwind: the policy assumption that shared mealtimes drive healthier eating is empirically false. This is directly relevant to the CPG and fresh produce categories targeting the family occasion: E-gene health messaging aimed at parents who already share meals will not materially change consumption if the children's V-gene relationship with vegetables is governed by fussiness rather than occasion frequency. The commercial implication is that the family health



occasion market is structurally harder to address through media investment than through product architecture: making vegetables sensorially acceptable to a fussy eater (flavor, texture, format) matters more than reminding the parent to serve them more often. European fresh produce and CPG manufacturers building MAHA-aligned health claims should direct investment toward product development that closes the sensory V-gene gap rather than toward occasion marketing that assumes the gap is already closed.



THEME 5:

GLP-1 Moves to Portfolio Surgery

From Strategy Documentation to Commercial Execution

43. Walmart's GLP-1 Basket Data: Fresh Category Surge Confirmed us

The Motley Fool / Retail Brew | [Read Article](#)

Walmart's Q4 FY2026 earnings call disclosed GLP-1 medication purchasers show increased Fresh category consumption through pharmacy-linked household data, acting as a significant double-digit % driver for basket sizes that results in overall balanced impact versus non-GLP-1 households. Walmart Health division CEO flagged GLP-1 basket optimization as primary merchandising strategy for Supercenter health corridors in 2026.

SO WHAT: Walmart's GLP-1 basket disclosure is the most commercially significant retail data release of Q1 2026 because Walmart controls approximately 26% of U.S. grocery spend, and its pharmacy-linked behavioral data provides the cleanest population-scale measurement of GLP-1 grocery impact. The Fresh category double-digit attachment increase among GLP-1 users confirms at Walmart scale what Circana documented at sample scale: GLP-1 users are not abandoning grocery shopping; they are redirecting food budgets toward higher-unit-value categories. For CPG companies with strong protein-dense or fresh-adjacent portfolios, the Walmart GLP-1 shopper represents their highest-growth acquisition target in 2026.

NOW WHAT → **FutureBridge:** Consumomics can deliver a **Walmart GLP-1 Shopper Category Opportunity Map** : scoring each major CPG category against the Walmart basket data behavioral demand signals, identifying which brands are currently capturing GLP-1 shopper basket share and which are systematically missing it, and prescribing the specific product format, positioning, and in-store placement investments that would most efficiently convert Walmart GLP-1 shopper traffic into brand-specific purchase behavior.

44. GLP-1 Penetration Hits 5.4% of U.S. Adults: The Behavioral Demand Tipping Point Is in the Household Panel, Not the Prescription Count us

Trilliant Health / Circana / Reuters | [Read Article](#)

GLP-1 medication users reached 18 million active U.S. adults (5.4% of the adult population) in Q1 2026, growing at 350,000–400,000 new prescriptions per month. The more commercially important data point is Circana's GLP-1 household panel: among active users, basket size reductions of 14–18% per trip, conventional snack volumes down 19%, sugary cereal down 24%, protein food category up 22%, and fiber-enriched food up 18%. These are actual scanner-verified purchase behavior changes flowing through supermarket category sales in real time.

SO WHAT: The commercial sorting that GLP-1 is performing across grocery categories is not random, and it specifically favors big brands with strong pre-store relationships over private label. GLP-1 users are not abandoning food quality; they are abandoning food volume. They are eating less but eating better, and "better" is defined by behavioral demand loyalty built before the store visit, not by what is cheapest at the shelf. A GLP-1 user who has a 15-year pre-store relationship with Campbell's chicken noodle soup (reinforced by family ritual memory, advertising equity, and product consistency) will keep that brand in their reduced-volume basket. They will cut private label

center-store first, then engineered impulse snacks, then low-loyalty mid-tier brands. The GLP-1 era is the era of trading down volume while trading up brand loyalty. Big CPG brands with genuine pre-store behavioral demand equity are positioned to be the last item cut and the first item kept.

45. Novo Nordisk and Eli Lilly's ~\$67 Billion Combined GLP-1 Sales: The Pharmaceutical Revenue That Is Restructuring Grocery Aisles US EU

Financial Times / Novo Nordisk IR / Eli Lilly IR | [Read Article](#)

Novo Nordisk reported full-year 2025 total revenue of approximately \$46.8B (DKK 309.1B), with its three semaglutide products, Ozempic, Wegovy, and Rybelsus, generating combined sales of approximately \$35.6B (DKK 234.5B). Ozempic alone reached DKK 127B (~\$18.5B), and Wegovy approximately DKK 85.5B (~\$12.4B); combined Ozempic and Wegovy sales reached approximately \$31B. Eli Lilly reported full-year 2025 Mounjaro sales of \$22.97B (up 99% year-on-year) and Zepbound sales of \$13.54B (up 175%), for a combined Mounjaro and Zepbound total of approximately \$36.5B. The two companies together generated approximately \$67–68B in combined GLP-1 revenue across their four primary weight-management and diabetes GLP-1 products, a pharmaceutical revenue figure that now comfortably exceeds the entire global confectionery category. Production capacity constraints that suppressed prescription growth in 2024 and early 2025 have eased substantially: Eli Lilly announced new U.S. manufacturing facilities in Virginia and Texas alongside Puerto Rico expansion, and Novo Nordisk's European manufacturing buildout has accelerated. With supply constraints lifting, the monthly new prescription rate is expected to accelerate through H2 2026.

SO WHAT: The scale of GLP-1 revenue is now so large that its second-order effects on grocery behavior cannot be treated as a niche planning variable. \$67B in pharmaceutical revenue directed at appetite suppression and metabolic recalibration is a structural intervention in the demand architecture of the food system, not a trend line on a category dashboard. The supply constraint lift specifically tests the pre-store behavioral demand architecture of every CPG brand in the reduced-volume basket. When a consumer transitions from GLP-1 month one, high attention to nutrition, active food decision-making, to GLP-1 month twelve, habituated, routine, less effortful food choices, they revert to pre-store default: they buy what they trusted before they walked in. Traditional food brands with decades of pre-store trust equity will recapture their positions as the habituated default in a reduced-volume basket. The brands that lose will be those that competed purely on shelf price, shelf placement, and in-store promotion and never built the pre-store relationship. GLP-1 habituation restores the value of pre-store trust. Big brands win the GLP-1 habituation phase.

NOW WHAT → FutureBridge: FutureBridge's Consumomics™ penetration curve modeling; incorporating pharmaceutical manufacturing capacity expansion data, insurance coverage expansion by state, biosimilar entry timeline modeling, and prescription growth rate under unconstrained supply; can deliver a **GLP-1 Penetration Acceleration Scenario Model** for 2026–2028 that gives CPG commercial teams the forward penetration curve they need to make investment decisions with the right time horizon.

46. European GLP-1 Penetration: 2.8% and Accelerating; Two Years Behind the U.S., Running the Same Playbook EU

Food Ingredients First / FoodNavigator Europe | [Read Article](#)

European GLP-1 penetration reached 2.8% of EU adults in Q1 2026. While the overall calorie reduction across the total EU food market is currently modest, estimated at just 0.25%, the impact is highly concentrated. ING's modeling indicates that for the approximately 10 million active users in Europe, daily calorie intake drops by 20% to 30%. This adoption curve mirrors the U.S. trajectory with a two-year lag, but the acceleration in high-income, health-conscious markets like Germany and the Netherlands is creating an immediate structural shift in the European grocery basket.

SO WHAT: The "Two-Year Lag" identified by ING is a pre-store trust-building window, not just a buffer. The critical takeaway for European CPG is that while total market volume decline is currently diluted, category-specific disruption is acute. Indulgent categories, confectionery, alcohol, and savory snacks, are the first to be pruned from the GLP-1 user's reduced-volume basket. The U.S. experience confirms that the brands surviving this "satiety filter" are those with the strongest pre-store V-scores. European CPG companies have a 24-month window to deepen relationships with high-probability adoption phenotypes (35–65 year olds) through loyalty programs and digital authority. Every euro invested in brand trust today protects behavioral demand for 2028, when penetration is projected to hit the 5% tipping point.

NOW WHAT → FutureBridge: Consumomics can build a **European GLP-1 Penetration Trajectory Model** : mapping the country-by-country EU penetration curve using reimbursement policy expansion data, obesity prevalence by country, and physician prescribing dynamics, and producing a market-prioritized portfolio surgery and pre-store trust investment recommendation for European CPG companies identifying which EU markets require GLP-1 behavioral demand response in 2026, which in 2027, and which carry 3+ years of runway.

47. GLP-1 and Pet Food: The Behavioral Paradox That Confirms Pre-Store Loyalty Survives Volume Compression us

Pet Food Industry / Mars Petcare | [Read Article](#)

Multiple pet food industry research surveys conducted and confirmed the behavioral paradox: GLP-1 medication users are reducing their own food intake and grocery basket size while simultaneously increasing their spend on premium pet nutrition. Mars Petcare's internal consumer panel data shows GLP-1 users spending 11% more on premium pet food per quarter than matched non-GLP-1 users. The effect is most pronounced in the 35–60 year old, suburban, high-income GLP-1 user segment; precisely the consumer phenotype that represents the highest-value customer for premium pet food brands.

SO WHAT: The GLP-1 pet food behavioral paradox is the single most powerful available proof point for the thesis that big brands win when their pre-store relationships are genuine. GLP-1 users are not simply cutting all food spend; they are cutting low-loyalty, low-V-score food spend and reallocating to categories and brands with deep pre-store emotional commitment. Premium pet food brands like Blue Buffalo, Purina Pro Plan, and Hill's Science Diet have built some of the deepest pre-store consumer trust relationships in the entire CPG universe: veterinarian-endorsed,

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safety-certified, species-specific-nutrition-backed, and emotionally anchored in the pet owner's identity as a responsible caregiver. That pre-store relationship is why GLP-1 users are increasing pet food spend even as they decrease personal food spend. This is behavioral demand loyalty in its purest form: it survives volume compression in human food categories because the emotional foundation was built before the store visit.

NOW WHAT → **FutureBridge**: Consumomics can build a **GLP-1 Behavioral Demand Transfer Model for Pet Food** : quantifying the behavioral demand transfer from human food categories to premium pet food by consumer phenotype and GLP-1 adoption stage, and identifying the specific premium pet food brands and categories that are best positioned to capture the incremental spending from the GLP-1-driven behavioral transfer. This model is a commercial planning input for any premium pet food brand seeking to size the GLP-1 tailwind and for any human food brand seeking to understand what pre-store loyalty depth looks like when it is fully operational under volume compression.

48. The High-Protein Product Launch Cascade: GLP-1 Behavioral Demand Reshaping Mainstream Formats

Food Business News | [Read Article](#)

The GLP-1-driven protein demand signal is now visible in simultaneous mainstream product launches across multiple CPG categories. Kraft Heinz introduced PowerMac, a functional mac-and-cheese line delivering 17 grams of protein and 6 grams of fiber per serving in original and white cheddar formats. Taylor Farms launched an 11-product protein-forward platform, Protein Chopped Salad Kits (10–21g protein), Protein Salad Bowls (20–23g protein), and Protein Power Snacks (13–17g protein), using whey-formulated dressings and croutons as protein delivery vehicles. Saffron Road launched Crossroads, a frozen meal line providing 24+ grams of protein per serving across globally-inspired formats (beef birria rigatoni, butter chicken cavatappi, Korean-inspired ravioli). Mondelēz extended Clif with energy bites delivering 6 grams of plant-based protein and a chocolate berry energy bar with 10 grams. Nestle added sparkling collagen water to the Vital Proteins brand. Naturipe launched SnackBites, fresh-produce-based bites with 4 grams of protein and a probiotic, positioned in the refrigerated produce section.

SO WHAT: The simultaneous protein fortification across frozen meals, fresh produce, salad kits, snack bars, and beverages in a single earnings quarter is not product innovation, it is behavioral demand architecture responding to a structural signal. GLP-1 users consuming 14–18% less food per basket are selecting on protein density per calorie, not on brand heritage or flavor variety. The categories winning GLP-1 share are those offering the highest protein-to-calorie ratio in familiar formats. Kraft's decision to put 17g of protein inside Kraft Mac and Cheese, the most recognizable comfort food format in America, is a precise A-gene strategy: it preserves the comfort food ritual automaticity while repositioning the nutritional profile toward GLP-1 compatibility. Taylor Farms moving whey protein into salad dressings and croutons is the same A-gene logic applied to fresh produce occasions. These are not reformulations; they are behavioral demand architecture upgrades to existing high-frequency purchase habits.

49. GLP-1 and Alcohol: The Unexpected Category Disruption; Beer, Wine, and Spirits Volume Data Surprises Beverage Executives us

Beverage Daily / IWSR | [Read Article](#)

IWSR published Q1 2026 data documenting GLP-1-correlated alcohol consumption declines materially larger than beverage industry planning models anticipated. GLP-1 medication users report 30–35% reductions in alcohol consumption; driven both by the medications' documented appetite-suppression effects extending to alcohol cravings, and by behavioral lifestyle changes associated with GLP-1 adoption. IWSR estimates GLP-1-associated behavioral demand reduction could remove 2–3% of total U.S. beer volume by 2028 if penetration reaches 8–10% of adults. Craft beer and premium spirits show lower behavioral demand reduction among GLP-1 users than mainstream beer and entry-level spirits.

SO WHAT: The divergence between premium spirits maintaining demand among GLP-1 users while mainstream beer contracts is precisely the pre-store loyalty thesis in action. Craft beer and premium spirit brands (brands that GLP-1 users chose before starting medication based on genuine taste preference, heritage, and craft identity) are being kept in the reduced-consumption repertoire because the pre-store brand relationship survived the volume compression. Mainstream beer brands (often purchased on the basis of price, availability, and in-store promotion) are being cut because there was no pre-store emotional relationship to protect. Traditional beer brands with genuine cultural heritage, regional identity, and consumer story have more resilience than their market share position suggests. The brands that built pre-store relationships are the brands that GLP-1 users keep in their smaller but more deliberate alcohol repertoire.

50. Constellation Brands + Hopwtr: The Non-Alcoholic Portfolio Build Confirms GLP-1's Alcohol Category Disruption

Food Business News | [Read Article](#)

Constellation Brands is acquiring Hopwtr, a sparkling water brand formulated with hops, adaptogens, and nootropics, founded in 2020 and previously supported by a Constellation venture investment in 2021. The acquisition, financial terms undisclosed, follows Constellation's minority stake in non-alcoholic functional beverage Hiyo in 2025 and its existing Corona non-alcoholic and Kim Crawford Illuminate brands. Constellation's beer division president Jim Sabia described the non-alcoholic segment as "one of the fastest growing areas of total beverage alcohol." Hopwtr's positioning targets consumers seeking a "calorie-free beer alternative with functional benefits", a direct behavioral demand capture from GLP-1 users reducing alcohol consumption while maintaining the social occasion format of a beer-in-hand.

SO WHAT: Constellation's systematic non-alcoholic portfolio assembly, Hopwtr, Hiyo, Corona non-alcoholic, Kim Crawford Illuminate, represents a major-scale alcoholic beverage company building a structural hedge against its core product category facing GLP-1 and sober-curious behavioral demand compression. The strategic logic is precise in PECA-V terms: the E-gene of the social drinking occasion (celebration, relaxation, social bonding) is intact and unaffected by GLP-1 or sober-curious behavioral shifts. What is being disrupted is the A-gene automaticity that previously

linked that E-gene occasion to alcoholic beer specifically. Non-alcoholic and functional beverages with hops, adaptogens, and nootropics are positioning as A-gene substitutes that preserve the occasion architecture while removing the caloric and pharmacological elements that GLP-1 users and sober-curious consumers are avoiding. This is the clearest example available of a scale incumbent engineering V-gene preservation in the face of behavioral demand migration.

51. GLP-1 Biosimilar Entry Timeline: When the \$500/Month Becomes \$30/Month. The Mass-Market Demand Event Every CPG Company Must Model Now us

Bloomberg / STAT News / Trilliant Health | [Read Article](#)

GLP-1 biosimilar entry (expected to begin in the 2027–2030 window) will reduce Ozempic and Wegovy-equivalent medication costs from \$500–\$1,000/month to potentially \$30–\$100/month, transforming GLP-1 from a premium pharmaceutical adoption phenomenon skewing to high-income adults into a mass-market behavioral health intervention accessible across the full income distribution. For the food industry, biosimilar entry is the event that brings GLP-1 behavioral demand compression to the mass-market grocery consumer segments that are currently the volume foundation of center-store CPG.

SO WHAT: Biosimilar entry is the event that most dramatically separates big brands with genuine pre-store loyalty from private label and low-loyalty national brands. At \$30–\$50/month, GLP-1 becomes accessible to the Budget Protector, the Value Essential, and the Mass Market Consumer phenotypes, the exact segments that currently represent the volume base of low-cost branded and private label center-store categories. When those consumers are on GLP-1 medication and making reduced-volume, higher-intentionality food decisions, the brands that survive in their baskets will be those with the deepest pre-store trust foundations, the brands their families have bought for decades, the brands associated with comfort, safety, and ritual. Traditional big CPG brands with genuine history and consumer relationships are far better positioned for the biosimilar scenario than the impression their current market share data suggests. They are holding pre-store loyalty equity that will express itself in basket retention when GLP-1 access democratizes.

NOW WHAT → FutureBridge: FutureBridge Consumomics can build a **GLP-1 Biosimilar Demand Surge Scenario Model** : projecting U.S. and EU GLP-1 adult penetration under \$30, \$50, and \$100/month biosimilar price scenarios, modeling the income distribution expansion of the user base, and estimating the category-level behavioral demand impact on the top 50 grocery categories under each penetration scenario, with a specific **pre-store loyalty retention differential** between big CPG brands and private label for each category.



52. Conagra's GLP-1 Portfolio Transition: 18% to 30% GLP-1-Aligned SKUs by 2027. The Industrial-Scale Reformulation Playbook us

Food Business News / Conagra Brands IR | [Read Article](#)

Conagra Brands disclosed in its Q3 FY2026 earnings presentation that 18% of its total portfolio SKUs are now classified as GLP-1-aligned (high protein, high fiber, portion-appropriate, or micronutrient-dense), with a stated target of 30% by the end of FY2027. The company's Birds Eye vegetable and protein bowls, Healthy Choice Power Bowls, Marie Callender's protein-enriched frozen entrées, and Vlasic vegetable snack packs are the core GLP-1-aligned brands driving the portfolio transition. CEO Sean Connolly described the GLP-1 transition as "the most significant portfolio repositioning opportunity since the shift to convenience formats in the 1990s."

SO WHAT: Conagra's 18%-to-30% GLP-1-aligned SKU transition is the industrial-scale commercial playbook, and the specific strategic insight is that Conagra is not launching new brands to capture the GLP-1 opportunity. It is repositioning existing brands with pre-existing consumer relationships, pre-existing purchase occasion architecture, and pre-existing pre-store trust equity. Birds Eye's brand equity, built through decades of "real vegetables, real simple" communication, is the pre-store trust asset that makes "Birds Eye Protein Bowl" credible to the GLP-1 user immediately, without starting the V-score installation process from zero. Private label frozen protein bowls carry no pre-store credibility advantage. They are waiting to be chosen at the shelf price point. Conagra's GLP-1-aligned portfolio is winning before the consumer reaches the freezer door.

53. Postbiotics and Creatine Move from Specialty to Mass Market: Expo West's Structural Signal

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Natural Products Expo West March 2026 showcased two ingredients making the transition from specialty supplement into mainstream food and beverage: postbiotics and creatine. Postbiotics, the metabolic byproducts of fermentation that carry gut health benefits without requiring live probiotic cultures in the formulation, appeared in Garden of Life's Organic Kids Gut & Immunity Smoothies (heat-treated after culturing), Asahi Beverages America's Refrezz shelf-stable wellness sodas (claiming sleep support and immune function), and L.A. Lucky Import Export's Cheerpop fruit juice sodas combining all three biotics (pre, pro, and post) in a single formulation. Creatine, a naturally occurring amino acid compound supporting energy for muscles and the brain, and one of the most clinically validated performance ingredients, appeared in Rello protein bars (1.2g creatine per bar, using soluble creatine maintaining 80% solubility for 12 months), Rello protein shakes (5g creatine), and MOSH protein bars (recently reformulated to include creatine for cognitive health support). The primary technical breakthrough is stability: Rello's soluble creatine addresses the historically problematic dispersibility in ready-to-drink beverages over shelf life.

SO WHAT: Postbiotics' commercial significance is their formulation flexibility advantage over probiotics: heat stability means they can be added to shelf-stable beverages, baked goods, and heat-processed foods where live probiotic cultures cannot survive. The category expansion from premium refrigerated supplements to ambient shelf-stable formats removes the cold chain barrier

that has constrained probiotic market penetration. Creatine's transition from sports supplement to mainstream food format is a direct GLP-1 behavioral demand signal: consumers reducing caloric intake while seeking muscle preservation and cognitive performance are creating demand for creatine in convenient everyday food formats rather than specialty supplement tubs. The technical barrier (RTD shelf stability) has been solved at Rello. First-mover CPG companies that embed clinically validated creatine into mainstream food formats, protein bars, beverages, dairy, can capture the crossover consumer segment before the category commoditizes.

54. Precision Fermentation Protein and the Mainstreaming of Sports Nutrition

Food Business News | [Read Article](#)

The FDA approved Eli Lilly's Foundayo (orforglipron), a once-daily oral GLP-1 receptor agonist, on April 1, 2026, significantly ahead of its PDUFA timeline via priority review. Clinical trials showed 12.4% average weight loss over 72 weeks. Critically, Lilly priced the drug at \$149/month self-pay (or ~\$25 with insurance) via LillyDirect, compared to \$500–\$1,000/month for injectable GLP-1s. As an oral formulation, Foundayo also removes the primary behavioral barrier of injection aversion, making GLP-1 therapy accessible to a much broader population.


SO WHAT: This is the mass-market GLP-1 inflection point, arriving 2–4 years ahead of industry expectations. Price and format barriers, the two constraints limiting adoption, have been removed simultaneously. GLP-1 usage is no longer confined to high-income, insured consumers; it is scaling into the mainstream. The current ~18M U.S. user base could expand toward 30–40M within 12–18 months, accelerating demand compression across indulgent and high-calorie categories.

55. Precision Fermentation Protein and the Mainstreaming of Sports Nutrition

Food Business News | [Read Article](#)

The sports nutrition ingredient market is undergoing structural expansion from elite athletes toward mainstream "everyday performers." Verley, a French biotech company, produces beta-lactoglobulin (BLG), the most functionally relevant whey protein fraction, through precision fermentation with 11% more leucine than native whey, 72% lower greenhouse gas emissions, 81% less water use, and 99% less land use per gram of protein than conventional dairy processing. The company received FDA GRAS status on two ingredients in 2025. FrieslandCampina Ingredients is documenting growing consumer adoption of casein, whey's slower-digesting counterpart, as educated consumers move toward time-specific recovery nutrition extending across the full day rather than only the post-workout window. Puris launched ClearP, a transparent pea protein for beverages targeting sports drinks with hydration positioning. Data from SPINS shows energy and sports drinks reaching \$35 billion for the 52-week period ending December 28, 2025, up 9% in dollar sales and 7% in unit sales year-over-year.

SO WHAT: Sports nutrition's category expansion from athletes to "everyday performers" is the GLP-1 behavioral demand architecture manifesting in the ingredient innovation pipeline: the same



consumer actively reducing caloric intake through GLP-1 is simultaneously increasing protein quality prioritization to preserve muscle mass during weight loss. This creates a simultaneous demand signal for higher-quality, bioavailable protein across every food format consumed by GLP-1 users. Precision fermentation's entry into food-grade protein ingredients is commercially significant not for its sustainability credentials, though those matter for European regulatory compliance, but because it can produce specific protein fractions with nutritional advantages that conventional dairy extraction cannot match at scale. The \$35 billion sports and energy drink market at 9% growth while conventional snack categories decline 19% among GLP-1 users is the most commercially precise signal available about where behavioral demand is migrating.



THEME 6:

QSR Under Structural Pressure

GLP-1, Tariffs, and the Value War: Three Compression Vectors Converging on One Sector

56. McDonald's Q4 2025: Comparable Sales Slowdown; Executives Confront the "Satiety Filter" us

Business Insider / McDonald's Investor Relations | [Read Article](#)

McDonald's reported a notable deceleration in its Q4 2025 earnings call, with U.S. comparable sales growth slowing as the brand faced a "meaningful visit frequency gap" among health-conscious and higher-income segments. In the **February 11, 2026** earnings call, CEO Chris Kempczinski and CFO Ian Borden explicitly addressed the GLP-1 headwind, noting that as adoption increases, "consumers' behavior changes." The company is now pivoting toward a **"Protein-Forward"** menu strategy to capture consumers who are eating less but seeking higher nutritional density and fewer sugary, carbohydrate-heavy "order fillers."

SO WHAT: McDonald's three-quarter comparable sales decline is actually the clearest available evidence for why pre-store brand relationships must be built on something deeper than "accessible, fast, cheap." McDonald's has one of the most powerful pre-store brand equity positions in the world, the Golden Arches, Happy Meal memory, Ronald McDonald childhood association, and decades of cultural omnipresence. That pre-store equity is still there and still protecting McDonald's from the full worst-case scenario. The problem is that McDonald's pre-store equity is built on the wrong E-gene foundation for the GLP-1 era: it is built on abundance, indulgence, and convenience at any price rather than on quality, intentionality, and nutritional respect. Big QSR brands need their pre-store equity to migrate, from "I know where McDonald's is" to "I trust McDonald's to feed me well." That migration is a multi-year behavioral demand re-architecture, not a menu addition.

57. Chipotle Q1 2026: Fast Casual and the GLP-1 Occasion; Why the +4.8% Figure Cannot Be Used us

Chipotle IR | [Read Article 1](#) | [Read Article 2](#)

Chipotle's Q4 2025 full-year comparable restaurant sales performance and its structural positioning in the fast casual format confirm that ingredient transparency, visible food quality, and customization control are precisely aligned with the behavioral demand architecture of the Health Optimizer and GLP-1 User phenotypes. Fast casual as a format outperformed traditional QSR throughout 2025, and Chipotle's customizable bowl architecture, "Food With Integrity" sourcing narrative, and protein quantity control give it structural advantages in an era when GLP-1 users are choosing quality over volume. CEO Scott Boatwright has noted that GLP-1 users tend toward higher-protein configurations and higher per-visit transaction values. Q1 2026 actuals are due April 29 and this article should be updated at that time.

SO WHAT: The fast casual pre-store brand relationship most resilient to GLP-1 in QSR is built on ingredient transparency, visible food quality, and customization control, the same pre-store trust architecture that big CPG brands need to build in grocery. Chipotle wins before the consumer walks through the door because they have already decided, at home, that Chipotle is where they get real ingredients prepared simply. That pre-store decision is not a price decision; it is a quality and trust decision made on the basis of Chipotle's consistent brand communication about how its food is made. The QSR lesson for CPG is direct: the pre-store story about how your food is made is the most powerful driver of GLP-1-era behavioral demand, because GLP-1 users are exactly the

consumer phenotype most motivated to make food decisions on quality rather than price or convenience.

NOW WHAT → **FutureBridge: Consumomics** can deliver a Fast Casual vs. Traditional QSR GLP-1 Occasion Migration Model, mapping the specific consumer phenotypes migrating occasions from traditional QSR to fast casual under GLP-1 behavioral demand influence, and modeling the occasion recapture potential for traditional QSR operators who invest in fast casual-equivalent ingredient transparency, visible quality architecture, and pre-store communication about food integrity.

58. Starbucks Q1 FY2026: Brian Niccol's "Back to Starbucks" Strategy Ahead of Schedule us

Starbucks IR | [Read Article](#)

Starbucks Q1 FY2026 delivered a clear beat under CEO Brian Niccol, with global comparable store sales up 4% and U.S. comparable store sales up 4%, driven by a 3% increase in comparable transactions and a 1% increase in average ticket. This marked U.S. comparable transaction growth for the first time in eight quarters. Niccol stated: "Our Q1 results demonstrate our 'Back to Starbucks' strategy is working and we believe we're ahead of schedule." Consolidated net revenues rose 6% to \$9.9 billion. The company introduced fiscal year 2026 guidance for global and U.S. comparable store sales growth of 3% or more. Niccol's restructuring focuses on three vectors: restoring the cafe experience (slowing throughput, reintroducing handwritten cup names, reducing mobile order percentage of peak period traffic), simplifying the menu from 170+ items to a more focused premium architecture, and rebuilding the brand's V-score among the Ritual Loyalist phenotype that originally built Starbucks into a daily habit institution.

SO WHAT: Niccol's Starbucks restructuring is the most important available case study in how a big QSR brand actively rebuilds its pre-store consumer relationship after allowing it to erode. The specific strategic moves (slower service, fewer items, barista personalization, cafe environment quality) are all investments in the pre-store behavioral demand narrative: the story the consumer tells themselves about why they are choosing Starbucks before they walk in. "I'm going to Starbucks because it's my 8am ritual and the barista knows my name" is a pre-store behavioral demand relationship. "I'm going to Starbucks because it's convenient and the app is easy" is an in-store utility relationship. Niccol is converting Starbucks from the latter back to the former, which is exactly the right strategic direction, and exactly the same direction that every big CPG brand in V-crack territory needs to travel.

NOW WHAT → **FutureBridge: Consumomics** can deliver a Starbucks V-Score Recovery Timeline Model, scoring the current V-score status of the Ritual Loyalist, Premium Indulger, and Health Optimizer phenotypes that represent Starbucks' most commercially valuable customer segments, and modeling the pre-store relationship reinvestment timeline under Niccol's specific menu simplification, cafe experience, and digital loyalty strategy assumptions.

59. Taco Bell: Cultural Relevance as Pre-Store Demand Architecture; Q1 2026 Results Pending us

CNBC / Yum Brands IR | [Read Article 1](#) | [Read Article 2](#)

Taco Bell delivered full-year 2025 U.S. same-store sales growth of 7% and Q4 2025 U.S. same-store sales growth of 3%, consistently outperforming the broader QSR industry throughout the year. Yum Brands CEO David Gibbs credited Taco Bell's structural value architecture, menu innovation velocity, and Gen Z and millennial consumer phenotype orientation as the key performance drivers. Taco Bell's cultural relevance engine (live music integrations, limited-time offering architecture, and social media virality) continues to generate consumer behavioral demand through the E-gene dimension with consistency that few QSR brands can replicate. Q1 2026 results are due in late April and should be incorporated when available.

SO WHAT: Taco Bell's sustained outperformance is a pre-store cultural relevance story, not a value story. The reason Taco Bell consistently outperforms when McDonald's faces pressure in the same tariff and GLP-1 environment is not that Taco Bell's prices are lower; McDonald's \$5 Meal Deal is competing on price too. It is that Taco Bell's pre-store relationship with its core consumer phenotype is built on cultural currency, self-expression, and participatory entertainment in a way that generates voluntary, enthusiasm-driven visits rather than resignation-driven convenience visits. The consumer who says "I'm going to Taco Bell tonight because I saw the new Cantina Chicken Scrambler drop on Instagram" has made a pre-store behavioral demand decision driven by E-gene activation that a \$5 Meal Deal promotional investment cannot replicate. Cultural relevance is the most durable form of pre-store behavioral demand architecture available to QSR.

NOW WHAT → **FutureBridge: Consumomics** Consumer Genome Atlas can segment the U.S. QSR consumer universe by GLP-1 exposure risk, scoring which consumer phenotypes, age segments, and income demographics carry the highest GLP-1 adoption probability in the 2026-2028 window, and mapping those segments onto each major QSR chain's current core consumer composition. This QSR Consumer Base GLP-1 Exposure Map gives each operator a clear forward view of where their traffic vulnerability concentrates and whether their pre-store cultural relevance architecture protects them from the segments most at risk.

60. McDonald's Q4 2025: Strong Recovery Reshapes the GLP-1 Narrative; Occasion Architecture Is the Real Question us EU

McDonald's IR | [Read Article](#)

McDonald's Q4 2025 results reported February 11, 2026, showed a strong recovery: U.S. comparable sales increased 6.8%, global comparable sales increased 5.7%, consolidated revenues rose 10% to \$7.01 billion, and global systemwide sales for the full year grew 7% to over \$139 billion. Active loyalty users reached 210 million globally, with digital sales accounting for nearly \$37 billion of full-year revenue. The company's value architecture (McValue meal deals, MyMcDonald's Rewards) drove positive guest count growth in the U.S. McDonald's global menu architecture team is actively evaluating GLP-1-aligned menu additions (high-protein wraps, grain bowls, and protein box formats) as a forward-looking response to behavioral demand evolution. Analysts including BTIG's Peter Saleh and Baird's David Tarantino have noted that menu additions are a necessary but insufficient

response: the fundamental challenge is not menu coverage but occasion architecture, as GLP-1 users are reducing visit frequency regardless of menu architecture.

SO WHAT: McDonald's Q4 2025 recovery demonstrates the power of the value-loyalty combination as a short-term stabilizer. But the deeper strategic question the GLP-1 era poses is not whether McDonald's can execute a promotional quarter; it is whether McDonald's can migrate its pre-store brand equity from an occasion architecture built on "fast food when I don't want to think" to one built on "real food made simply for people who care what they eat." McDonald's has extraordinary pre-store media reach, loyalty program depth (210 million active members), and cultural omnipresence. The commercial opportunity is to use those assets to tell a new pre-store occasion narrative before GLP-1 penetration reaches the levels that have compressed fast casual traffic in other markets. The company that invests in that narrative now, while its value architecture is working, will be in a structurally stronger position than the one that waits for traffic decline to force the change.

NOW WHAT → **FutureBridge: Consumomics** can deliver a McDonald's Occasion Architecture Re-Engineering Blueprint, identifying the specific GLP-1 User and Health Optimizer phenotype sub-segments within McDonald's current customer base that retain the highest pre-store behavioral demand potential, mapping the new occasion narratives most credible to those phenotypes given McDonald's existing brand equities, and modeling the pre-store communication investment sequence (loyalty app, digital content, menu storytelling, ingredient transparency) that builds the new occasion relationship before GLP-1 visit frequency compression becomes structural.



THEME 7:

Age of Scale in Motion

The M&A and Portfolio Architecture That Separates the Next Decade's Winners

61. The Unilever-McCormick Combination: Flavor as the Last Unreplicated V-Score Architecture in Food us EU

Unilever / Reuters | [Read Article](#)

The \$44.8B Unilever-McCormick combination (announced March 31, 2026 (just 10 days before this report's date) and not yet in regulatory review, expected close mid-2027) creates the world's dominant flavor, condiment, and seasoning platform, combining McCormick's 130-year herb, spice, and seasoning heritage with Unilever's Hellmann's, Knorr, and Colman's condiment architectures. The strategic logic is specific: flavor is the most behaviorally durable food category in existence, because it is the category most deeply embedded in family ritual, cultural tradition, and cooking identity. Nobody replaces their grandmother's spice rack with private label. Flavor is the V-score fortress.

SO WHAT: The Unilever-McCormick deal is specifically a bet on the most GLP-1-resilient, private-label-resistant, tariff-durable behavioral demand architecture in food. Flavor and seasoning sit in the exact center of the big brands win thesis: the consumer who reaches for McCormick cinnamon, Hellmann's mayonnaise, or Knorr chicken stock has made that decision before they reached the grocery store. The A-gene for flavor brands is installed at the recipe and ritual level ("my family makes chicken with this") which is the most durable form of behavioral automaticity available in consumer food. GLP-1 users eat smaller portions; they still season them. Hard discount can private label salt; it cannot private label 130 years of McCormick's culinary authority. The flavor category is also specifically GLP-1-resilient because you do not reduce seasoning usage when you reduce portion size; you may actually increase it to satisfy per-bite flavor intensity.

NOW WHAT → **FutureBridge:** TerraCaptus™ patent analysis can map the flavor science IP landscape, identifying which aroma compound, taste modulation, and flavor delivery technology patents are being most aggressively filed in the post-merger environment, signaling where the combined Unilever-McCormick entity will build its next decade of V-score differentiation through proprietary flavor technology that no private label manufacturer can access or replicate.

62. Danone Acquires Huel for €1B: The Meal Replacement Category Gets a Big Brand Balance Sheet; But Is the Timing Right? EU

FoodNavigator / Danone IR | [Read Article](#)

Danone's announced €1B acquisition of Huel (deal announced March 23, 2026, pending regulatory approval, not yet closed) (the UK-born, globally distributed complete nutrition meal replacement brand) gives Danone a direct position in the structural nutrition and meal replacement category. Huel's £200M+ annualized revenue, digital-native consumer acquisition model, and subscription architecture provide Danone with both a commercial asset and a consumer relationship data platform for the direct-to-consumer channel. The acquisition extends Danone's adjacency to the GLP-1 user nutritional needs space and positions it alongside Nestlé Vital Pursuit as a competitor for the behavioral demand of the Health Optimizer and GLP-1 user consumer segments.

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SO WHAT: The Huel acquisition is strategically sensible on its face; but the timing nuance that most M&A analysis is missing is the GLP-1 discontinuation reality. Huel's meal replacement value proposition has always attracted health-motivated, convenience-oriented consumers who want controlled nutrition without food complexity. GLP-1 users are an obvious target customer, and an obvious risk customer: GLP-1 discontinuation rates above 50% in year one mean that approximately half of GLP-1 users who adopted Huel as a GLP-1 companion behavior will be back to normal eating patterns within 12 months. Danone's €1B investment is sound if Huel builds genuine non-GLP-1 behavioral demand across its broader consumer base; it is risky if the growth acceleration thesis is primarily premised on the GLP-1 companion demand wave that may be episodic rather than structural.

NOW WHAT → FutureBridge: Consumomics can model the **Huel Consumer Demand Durability Scenario** : distinguishing between Huel customers with genuine structural meal replacement behavioral demand (time-constrained professionals, athletes, travelers) versus episodic GLP-1 companion demand, and modeling the revenue resilience under 50%, 60%, and 70% GLP-1 discontinuation scenarios. This is exactly the acquisition diligence lens that big CPG deal teams need when evaluating targets whose revenue is materially shaped by GLP-1 adoption dynamics.

63. Chobani's \$567M La Colombe Bet: Coffee-Dairy Convergence Builds Scale Infrastructure

Food Business News | [Read Article](#)

Chobani is investing \$567 million in a capacity expansion at La Colombe's Norton Shores, Michigan facility, adding over 200,000 square feet of production space. The investment follows Chobani's \$900 million acquisition of La Colombe in 2023. Since acquisition, Chobani has grown the brand through a Keurig Dr Pepper partnership for distribution and through deliberate cross-category innovation: its dairy creamer business, representing approximately 10% of total U.S. grocery creamer volume but 70% of category growth, is being leveraged as a platform to expand La Colombe's multi-serve coffee offerings. Chief Customer Officer John Frost cited 2026 as the year La Colombe would "show up much more prominently across retail." Separately, Chobani has invested \$500 million to expand its Twin Falls, Idaho yogurt plant and broken ground on a \$1.2 billion milk processing plant in Rome, New York.

SO WHAT: Chobani's \$567M La Colombe infrastructure bet follows the identical logic as the KDP/JDE Peet's combination: the intersection of dairy protein and premium coffee is the behavioral demand sweet spot created by GLP-1 adoption. Chobani's creamer-to-coffee cross-sell is a precision A-gene installation strategy: the consumer who already has Chobani creamer in their daily coffee ritual can be migrated to the La Colombe multi-serve format through in-store co-merchandising, the A-gene already installed in the creamer moment is leveraged to capture the adjacent coffee occasion. The cumulative capital investment (La Colombe acquisition + Norton Shores + Twin Falls + Rome) exceeds \$3 billion since 2023. For a private company led by a founder-operator, this is the most concentrated bet in the food industry on dairy-coffee convergence as a structural category growth platform.

64. Keurig Dr Pepper + JDE Peet's: The \$18.4B Coffee Scale Play and the Strategic Reverse Split

Food Business News | [Read Article](#)

Keurig Dr Pepper completed its \$18.4 billion acquisition of 96.22% of JDE Peet's shares, creating a global coffee company with manufacturing across 40+ facilities worldwide encompassing the Keurig, Jacobs, L'OR, and Peet's Global Coffee Co. brands. In a structurally unusual post-acquisition move, KDP simultaneously announced plans to separate into two independent U.S.-listed public companies: a cold beverage-focused refreshment company (Dr Pepper, 7UP, Canada Dry, A&W; HQ in Frisco, Texas) and a global coffee company (Keurig, JDE Peet's brands; HQ Burlington, MA and Amsterdam). Rafael Oliveira, current JDE Peet's CEO, was named CEO of the coffee operating unit and future global coffee company; Tim Cofer will lead the cold beverage company. Target separation: year-end 2026.


SO WHAT: KDP's decision to acquire at scale then immediately separate into two pure-play companies is the most structurally significant corporate architecture move in the beverage sector since the original Mondelez/Kraft separation. The logic is precise: the behavioral demand architectures of cold soft drinks and hot/premium coffee are diverging. Cold soft drinks face GLP-1 compression, SNAP restriction, and MAHA reformulation pressure simultaneously. Premium coffee faces none of these structural headwinds, in fact, GLP-1 users are maintaining coffee consumption at higher rates than any other beverage category. Running both businesses under a single P&L creates a valuation discount in which the coffee business's premium multiple is diluted by the cold beverage business's structural pressure. The reverse split creates two separately valued companies where each can attract the appropriate investor base and make capital allocation decisions unencumbered by the other's growth profile. This is portfolio surgery at the corporate architecture level.

65. DSM-Firmenich Sells Animal Nutrition Division: The Signal That Ingredient Science Capital Is Rotating Toward Human Food EU

Food Ingredients First / DSM-Firmenich IR | [Read Article](#)

DSM-Firmenich completed the sale of its Animal Nutrition division for €2.2B, rotating capital toward its human food ingredient and flavor science platforms, specifically its taste modulation technology, nutrient fortification systems, and microbiome-active ingredient portfolio. The divestiture reflects the combined company's strategic thesis that the highest-return capital deployment in ingredient science is in human food reformulation driven by MAHA regulatory requirements, GLP-1 nutritional need fulfillment, and clean-label ingredient substitution; three converging demand vectors that require proprietary science infrastructure that generalist ingredient suppliers cannot match.

SO WHAT: DSM-Firmenich's capital rotation is a direct signal about where ingredient science companies believe the highest-return innovation investment lives in the next decade, and it specifically validates the behavioral demand durability of traditional human food categories requiring quality reformulation rather than alternative protein substitution. The taste modulation technology portfolio that DSM-Firmenich is retaining is directly relevant to the indulgence and



comfort food reformulation challenge: reducing sodium and sugar in traditional comfort foods without destroying the taste experience that anchors their V-score. That is the hardest and most commercially valuable reformulation science problem in food, and it is the one that big CPG brands with pre-store trust relationships need solved if they are to reformulate for MAHA compliance while protecting the taste identity that their behavioral demand is built on.

NOW WHAT → **FutureBridge:** TerraCaptus™ can map DSM-Firmenich's post-divestiture IP strategy, tracking their human food ingredient patent filing acceleration across taste modulation, microbiome, and nutrient delivery technologies, and identify which CPG companies are entering partnership or licensing discussions with DSM-Firmenich's human food science platform. This creates a competitive intelligence map of which big CPG brands are building proprietary reformulation science advantages that will compound their V-score differentiation over a 3–5 year horizon.



THEME 8:

European Grocery, CPG & Retail Media

The Continent's Structural Transformation Is Accelerating on Multiple Simultaneous Vectors

66. Tesco Clubcard: The Most Powerful Pre-Store Consumer Relationship Platform in Global Grocery; And What It Means for CPG EU

IIDE / Tesco IR / The Grocer | [Read Article](#)

Tesco's Clubcard loyalty program reached 24 million active UK household memberships in Q1 2026, representing an 85% penetration rate of all UK households. More than a discount scheme, the Clubcard has become the core of Tesco's "Everything-Everywhere" strategy. By leveraging AI-driven data analysis, now accelerated by a newly announced partnership with Adobe (April 2026), Tesco has built a closed-loop retail media network that generated £250M in media revenue in 2025. This allows CPG companies to transition from "broadcasting" to "precision activation," reaching consumers across 130+ distinct data points before they enter the store.

SO WHAT: Tesco Clubcard is the institutional proof that retail media is not just a new advertising channel; it is a pre-store behavioral demand activation platform that big CPG brands can use to maintain and deepen their consumer relationships before the shelf interaction occurs. But here is the strategic nuance that most CPG retail media investment rationale misses: Tesco's Clubcard data is more valuable to Tesco than to any individual CPG brand, because Tesco can use it to build own-brand products precisely targeting the unmet needs of its 24 million member households. Every CPG brand that invests in Tesco retail media without simultaneously investing in direct consumer relationship infrastructure outside the retailer's ecosystem is funding the intelligence platform that will eventually be used against their category position. Big CPG brands must use Tesco retail media as a pre-store V-score activation tool while simultaneously building their own direct consumer data relationships that are retailer-independent.

NOW WHAT → FutureBridge: Consumomics can design a **Retailer Media + Direct Consumer Data Dual Architecture** : advising any CPG company on how to simultaneously maximize the pre-store activation value of Tesco Clubcard, Carrefour's loyalty ecosystem, and Ahold's Albert Heijn data platform while building a proprietary direct consumer relationship that does not depend on retailer media access for pre-store behavioral demand maintenance. The goal: use the retailer's platform to activate, use your own platform to retain.

67. Ahold Delhaize's European E-Commerce Grocery Strategy: 12.4% of EU Revenue Online. The Omnichannel Pre-Store Relationship EU

Ahold Delhaize IR / FoodNavigator Europe | [Read Article](#)

Ahold Delhaize reported that e-commerce grocery now represents 12.4% of its European revenue, led by Albert Heijn in the Netherlands at 16.8% e-commerce share and Bol.com's integrated grocery logistics. The company's European e-commerce growth is driven by its omnichannel loyalty architecture (connecting in-store Bonus Card data with online purchase behavior and retail media targeting) creating a complete consumer behavioral demand view that its CPG partners access through the Ahold Media & Technology commercial platform. European online grocery penetration is expected to reach 15–18% in core markets by 2028.

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SO WHAT: Ahold's 12.4% e-commerce share is specifically relevant to the pre-store behavioral demand architecture debate because online grocery shopping restructures the consumer decision process in ways that fundamentally shift the competitive dynamics between big CPG brands and private label. The in-store shopper who walks an aisle encounters private label products at eye level with national brand pricing adjacent, a permanent in-store point-of-purchase comparison that favors price switching. The online grocery shopper makes their initial product selection from a search result or a basket template, and the search algorithm or basket template that surfaces first is the one the consumer's previous behavioral demand history has installed. Big CPG brands with high repeat-purchase rates receive better algorithmic placement in online basket template systems, compounding their behavioral demand advantage in the online channel where private label has less shelf placement and checkout queue advantage than it enjoys in physical retail.

NOW WHAT → FutureBridge: Consumomics can model the **Online Grocery Behavioral Demand Shift** : scoring the specific mechanisms by which the migration of grocery shopping from physical to online channels affects the competitive balance between big CPG brands and private label across the 30 highest-volume European grocery categories, and identifying the specific pre-store digital content and basket template optimization investments that give branded CPG the highest online channel behavioral demand protection per euro invested.

68. Rewe Group Own-Brand Target: 40% of Total SKUs by 2028; Germany's Leading Conventional Grocer Goes All-In on Private Label eu

GlobeNewswire / European Supermarket Magazine | [Read Article](#)

Rewe Group (Germany's second-largest grocery retailer behind Edeka) announced a strategic target of reaching 40% own-brand SKU coverage by 2028, up from approximately 29% today. The initiative includes premium own-brand tier expansion under the Rewe Beste Wahl (Best Choice) label and an organic own-brand extension under the Rewe Bio platform. The 40% target reflects Rewe's strategic response to Aldi and Lidl's 37% combined German market share: matching hard discount on value perception while maintaining a service and quality architecture that hard discount cannot replicate.

SO WHAT: Rewe's 40% own-brand target is a direct threat to mid-tier national CPG brands in Germany; but it is a threat that specifically leaves space for big brands with genuine pre-store relationships. Rewe cannot build 40% own-brand coverage and simultaneously carry every national brand in every category. The SKU rationalization that follows a private label expansion program always cuts mid-tier national brands with weak shelf velocity first, premium brands with strong consumer pull last, and leading national brands almost never, because delisting a brand that consumers specifically seek by name generates consumer complaints, loyalty card defection signals, and competitive leakage to rival retailers. The brands that survive Rewe's 40% own-brand target are precisely the brands with the strongest pre-store behavioral demand pull, the ones consumers will notice if they are delisted and will seek elsewhere. Big brand pre-store loyalty is the insurance policy against retailer own-brand expansion.

69. EUDR December 2026: European Food Companies Scramble for Compliant Palm Oil, Cocoa, and Coffee Supply Chains EU

PSQR / Proforest / European Commission | [Read Article](#)

EUDR compliance data from Q1 2026 shows that European food manufacturers are materially incomplete in supply chain due diligence for five high-risk commodities (palm oil, cocoa, coffee, cattle-derived products, and soy) with the December 30, 2026 deadline for large companies now less than nine months away. Proforest, a leading supply chain sustainability consultancy, estimates that fewer than 40% of European food company supply chains for palm oil are fully EUDR-documented, and fewer than 30% for cocoa. The compliance gap is creating both a procurement risk and a competitive differentiation opportunity, the first movers who complete documentation will face no December disruption; late movers face the possibility of supply chain suspension for non-compliant commodities.

SO WHAT: EUDR compliance is the most immediate supply chain risk in European food; but as noted in Theme 4, the strategic opportunity for big brands is to convert compliance documentation into a pre-store consumer trust asset. Traditional European food brands built on cocoa, coffee, and palm oil ingredient architectures that complete EUDR documentation first can do something private label cannot: publish their verified deforestation-free supply chain story through consumer-facing channels before competitors. A traditional European chocolate brand that publishes its full EUDR-compliant cocoa traceability story (including farm-level GPS coordinates, satellite monitoring evidence, and farmer welfare data) is building V-score against a post-EUDR consumer who increasingly expects food origin transparency. The traditional food category's cultural heritage narrative is strongest when backed by verified supply chain evidence. EUDR compliance is the verification mechanism that makes the heritage story credible.

70. Carrefour and the European Retail Alliance: Scale Purchasing Power Hits €80B. The Private Label Quality Investment Machine EU

Carrefour / FoodNavigator | [Read Article](#)

Carrefour's membership in the Eureka retail purchasing alliance (alongside Rewe, Conad, and Colruyt) creates a combined purchasing volume of approximately €80 billion that generates ingredient sourcing, private label manufacturing, and logistics efficiencies unavailable to any individual retailer acting alone. The alliance's combined private label investment program is specifically targeting quality improvement in dairy, charcuterie, bakery, and prepared meal categories, the traditional food categories where national brand quality differentiation has historically been most robust.

SO WHAT: The Eureka €80B purchasing alliance attacking the quality gap in traditional food categories is precisely the competitive force that makes the big brands win thesis most urgent for traditional food manufacturers. The quality gap in artisan bread, premium cheese, and premium charcuterie between national brands and retailer own-brand used to be substantial enough that the consumer's pre-store quality expectation automatically favored the national brand. As Carrefour Selection and Rewe Beste Wahl close the quality gap using €80B in purchasing scale, the national

brand's quality advantage narrows to the dimensions that cannot be replicated by procurement scale alone: genuine artisan craft, protected origin designation, verifiable heritage process, and the pre-store storytelling that communicates these attributes before the consumer reaches the shelf. Traditional food brands must continuously demonstrate the quality dimensions of their V-score that private label cannot procure its way to.

NOW WHAT → **FutureBridge**: Consumomics can build a **Traditional Food V-Score Differentiator Audit** : scoring the specific quality, origin, and craft attributes of the top 30 European traditional food brands that are genuinely unreplicable by retailer own-brand procurement scale, and identifying the pre-store communication investment required to ensure those differentiators are fully understood by the consumer before the shelf comparison occurs. The audit specifically focuses on the quality dimensions that the Eureka alliance cannot commoditize.

71. Retailer Media and the Traditional Food Brand: Using Carrefour's Data Platform to Tell the Heritage Story at Scale EU

Carrefour / FoodNavigator | [Read Article](#)

Carrefour's retail media network (Carrefour Links) is generating increasing engagement from traditional European food manufacturers using its Clubcard-equivalent loyalty data platform to target consumers with heritage storytelling content, origin certification confirmation, and recipe association content in the pre-purchase digital journey. Carrefour Links' data shows that consumers who receive traditional food brand heritage content through the retail media network in the 24–72 hours before a shopping trip demonstrate 22% higher brand selection rates than matched control groups who receive only price promotion messaging.

SO WHAT: The 22% lift from heritage storytelling versus price promotion messaging in retail media is the empirical validation of the pre-store behavioral demand thesis for traditional food brands. Heritage content (farm origin stories, artisan production footage, chef endorsement, regional identity content) is activating the E-gene in the pre-store window where private label cannot compete. A Carrefour retail media placement showing a consumer the specific Normandy dairy farm where their Président butter comes from (48 hours before they shop) is building V-score that will express itself at the shelf as automatic brand selection rather than price comparison. Private label cannot run this campaign because it has no heritage to tell, no farm to show, and no artisan story to authenticate. Pre-store heritage storytelling is exclusively available to brands with genuine stories, and traditional food brands have the best stories in the entire grocery universe.

72. Tesco Finest Own-Brand at £2.5B: The Premium Private Label Architecture That National Brands Must Benchmark Against EU

IGD / Tesco IR | [Read Article](#)

Tesco Finest (the retailer's premium own-brand tier) crossed £2.5 billion in annualized UK sales in Q1 2026, growing 14% year-over-year and outpacing virtually every individual national food brand in the UK market. The Finest range spans 1,500+ SKUs across fresh, chilled, and ambient categories,

with particular strength in ready meals, cheese, wine, chocolate, and bakery. Tesco is investing in Finest quality architecture specifically targeting the consumer segments that premium national brands consider their most defensible: Premium Indulgers, Culinary Enthusiasts, and Host/Entertainer phenotypes.

SO WHAT: Tesco Finest's £2.5B and 14% growth is the clearest available European data point for the ceiling that premium private label can reach, and crucially, for where it stops. Tesco Finest succeeds in categories where premium positioning is primarily about ingredient quality and presentation and where the consumer has no pre-store brand relationship to override the value comparison. It succeeds less in categories where the national brand has built a specific pre-store occasion narrative that Tesco Finest cannot replicate: "Ferrero Rocher at Christmas," "Cadbury Milk Tray as a gift," "Pringles at the party." Occasion-specific, culturally embedded, emotionally ritualized brand narratives are the territory that Tesco Finest cannot fully enter regardless of quality investment, because the pre-store occasion relationship belongs to the brand, not to the retailer's product development team. Traditional food brands that build deep occasion-specific pre-store narratives will remain structurally protected even as Tesco Finest quality approaches parity.

73. Lidl's European Own-Brand Innovation Pipeline: What Private Label Can Copy and What It Cannot

Lidl Corporate / European Supermarket Magazine | [Read Article 1](#) | [Read Article 2](#)

Lidl launched 1,200 new own-brand SKUs across European markets in 2025 (the largest single-year own-brand innovation program in its history) spanning functional foods, sports nutrition, plant-forward ready meals, and premium bakery. Lidl's product development team, operating from its Neckarsulm headquarters, employs approximately 400 food scientists, chefs, and product developers dedicated exclusively to own-brand formulation. The investment confirms that Lidl views own-brand innovation not as a value-tier function but as its primary competitive differentiation engine against both conventional retailers and branded CPG.

SO WHAT: Lidl's 400-person own-brand R&D team can formulate nutrition facts, engineer taste profiles, and design packaging. What it cannot do is install a pre-store consumer relationship. Lidl's own-brand bakery can match the ingredient quality of a national artisan bread brand. It cannot replicate the 40-year family memory of Saturday morning walks to the baker for a specific loaf. Lidl can launch a sports nutrition range with identical macros to a premium sports nutrition brand. It cannot replicate the pre-store credibility signal of a sports nutrition brand whose formulation is used by professional athletes and validated by sports scientists whose names consumers recognize. The limit of private label innovation (even Lidl's 400-person R&D operation) is precisely at the boundary of the pre-store consumer relationship. Inside that boundary, private label can close the quality gap. Outside that boundary, where V-score, occasion memory, and trust relationships live, big brands remain structurally protected.

NOW WHAT → **FutureBridge:** TerraCaptus™ can track Lidl's own-brand patent and trademark filings across European markets, providing advance intelligence on which categories Lidl's R&D team is preparing to enter with sophisticated own-brand competitors, giving national brand manufacturers the 12–18 month forward warning needed to deepen pre-store consumer relationships in those categories before the Lidl own-brand competitor appears on the shelf.

74. AI-Enabled ERP in Fresh Produce: The Demand Forecasting Infrastructure Gap That Scale Players Will Exploit

Produce Business / Bryan Barsness (Prophet ERP) | [Read Article](#)

Bryan Barsness, Business Development Director at Prophet ERP, documents the structural maturation of AI-augmented Enterprise Resource Planning in fresh produce distribution. The key capability advances: conversational AI interfaces enabling warehouse supervisors to query spoilage risk and reprioritize shipments without spreadsheet analysis; automated EDI document mapping reducing partner onboarding from weeks to days; AI-enhanced Materials Requirements Planning incorporating real-time sales signals, weather data, USDA pricing, and holiday calendars alongside historical volumes; and exception-driven quality control in which cameras and sensors flag anomalies against historical baselines rather than relying on routine batch sampling. The article cites a demonstrable commercial use case: a distributor facing a midseason heat spike can have their ERP's AI flag at-risk lots, recommend rerouting to nearby foodservice customers, and adjust repack schedules within hours of a temperature alert.

SO WHAT: Fresh produce's technology infrastructure gap is the primary source of the sector's persistent structural margin compression: spoilage, demand forecast error, and logistics inefficiency have historically been absorbed as the cost of operating in a perishable commodity business. AI-augmented ERP converts these structural losses into recoverable margin. The competitive dynamic this creates is structurally similar to what retail media technology created in packaged goods: companies that deploy superior demand forecasting infrastructure create a compounding performance advantage that companies without it cannot close through volume or procurement scale alone. For the downstream food majors, Sysco, US Foods, Ahold Delhaize fresh, Walmart supply chain, the fresh produce AI-ERP capability gap is a \$1–3B annual margin recovery opportunity in aggregate.

75. Tesco × Adobe AI Partnership, Clubcard Personalization & Retail Media Scaling

Adobe Newsroom UK | [Read Article](#)

Tesco and Adobe announced a strategic AI partnership on April 13, 2026, launching a co-innovation lab to deliver hyper-personalized engagement to Tesco's 24 million+ Clubcard households. By integrating Adobe Experience Platform with Tesco's behavioral data, the retailer can now deliver real-time, AI-driven offers across its app, website, and in-store digital touchpoints. This initiative bolsters Tesco's retail media network, which generated £250M in 2025, providing FMCG brands with AI-enhanced targeting across 130+ consumer data dimensions.

SO WHAT: Retail media is evolving from an advertising channel into a pre-store behavioral demand engine. Tesco is transforming Clubcard from a loyalty program into a real-time consumer influence platform, where brands can shape decisions 24–72 hours before purchase using actual transaction data, not proxy signals. This closes the loop between media, data, and conversion.



THEME 9:

Cocoa & Coffee Input Cost Crisis

The Two-Year Margin Destruction Event and Its Long-Run Structural Legacy

76. Arabica at \$4.30/lb: Coffee Price Inflation Is Permanent at This Supply Curve, Which Brands Held Volume and Which Did Not

EU

IMF/FRED / Circana | [Read Article 1](#) | [Read Article 2](#)

Arabica coffee futures peaked at approximately \$4.30/lb in September 2025, more than double the five-year pre-crisis average, before beginning a sharp correction through Q1 2026. By January 30, 2026, ICE Arabica had fallen to \$3.31/lb (a six-month low at the time); the IMF benchmark averaged \$3.21/lb in February 2026; and by early April 2026, prices had declined further to approximately \$2.90/lb. The correction was driven by a dramatically improved Brazil 2026/27 crop outlook: StoneX, Marex, and Sucafina all forecast a record Brazilian harvest of approximately 75–76 million bags, with the global coffee market projected to register a surplus of roughly 10 million bags in 2026. Retail shelf prices, which lag futures by several months due to hedging and supply contract structures, continue to run +18–22% year-on-year through early 2026. Industry tracking data indicates private label coffee gained approximately 1.8 percentage points of U.S. market share against branded equivalents over the prior 12 months, concentrated in value channel and conventional grocery formats.

SO WHAT: Coffee is the consumable most deeply embedded in daily ritual automaticity of any food or beverage category, and the current price cycle is the most important available real-world test of behavioral demand durability for a premium commodity-derived brand. A 1.8 percentage point private label share shift against +18–22% branded price increases means approximately 96% of behavioral demand for branded coffee survived a generational price shock. The GLP-1 impact on coffee is minimal (estimated –4% volume among active users), confirming that the morning coffee ritual is almost entirely preserved even among those on appetite-suppressing medication. As futures now correct sharply toward \$2.90/lb, the critical commercial inflection arrives: brands that use this cost relief window to invest in consumer relationships rather than simply restoring margins will compound their behavioral demand advantage for the cycle ahead.

NOW WHAT → FutureBridge: Consumomics can build a **Coffee A-Genes Durability Audit** : mapping the degree of morning ritual automaticity for the top 15 branded coffee products in U.S. and European markets, identifying the consumer phenotypes with the highest A-gene installation depth for specific coffee brands, and modeling the maximum price elevation those phenotypes will absorb before the A-gene disruption threshold is crossed. This is the commercial planning tool that allows coffee brand managers to optimize pricing within the behavioral demand durability envelope rather than guessing at the price threshold through sequential price testing.

77. Nespresso at CHF 6.5B: The Premium Coffee Platform That Has Engineered Its Way Out of Commodity Cost Exposure

Nestlé Segment Reporting / FoodNavigator | [Read Article](#)

Nestlé's Nespresso division reported CHF 6.5 billion in full-year 2025 revenue, reported sales up from CHF 6.4B in FY2024, delivering organic growth of 6.0% driven by pricing of 4.4% and positive real internal growth of 1.6%, despite a negative foreign exchange impact of 4.6% (Nestlé FY2025

full-year results, published February 19, 2026). Nespresso sustained its position as the world's leading premium portioned coffee system through its AAA Sustainable Quality sourcing program, working directly with approximately 100,000 farmers across 14 origin countries, and its proprietary Vertuo capsule architecture. Market share gains continued in North America, while the Western European environment remained competitive. Vertuo delivered strong performance particularly in North America.

SO WHAT: Nespresso is the textbook case for how a premium brand engineers its way out of commodity input cost exposure through pre-store relationship building at multiple levels simultaneously: with the consumer through its premium boutique and subscription architecture; with the farmer through direct sourcing relationships that build origin-story authenticity; and with the machine ecosystem through proprietary capsule IP that makes Nespresso a system purchase rather than a coffee purchase. The Nespresso consumer who makes their morning Ristretto from their Vertuo machine has not bought a cup of coffee, they have bought a morning ritual system whose switching cost includes hardware investment, flavour profile habituation, and boutique brand identity. That is A-gene installation at its most architecturally durable.

NOW WHAT → **FutureBridge:** TerraCaptus™ can map Nespresso's capsule IP protection architecture, tracking patent filings, trademark registrations, and competition authority actions related to third-party capsule compatibility across European and U.S. markets; to provide a forward view of where Nespresso's proprietary capsule moat is most legally durable and where competitive encroachment risk is highest.

78. Mondelēz and the Cocoa Surplus Paradox: Futures Fall but the Processing Economics Remain Damaged. The Long-Run Margin Story us EU

Reuters / ICCO / Food Business News | [Read Article](#)

The ICCO's February 2026 Quarterly Bulletin of Cocoa Statistics (Volume LII, No. 1, published February 27, 2026) revised the 2024/25 cocoa season to a global supply surplus of 75,000 tonnes, the first surplus in several years, following the 2023/24 deficit of 489,000 tonnes. Global cocoa production for 2024/25 is now estimated at 4.728 million tonnes against grindings of 4.606 million tonnes. StoneX separately projected in January 2026 a further surplus of 287,000 tonnes for the 2025/26 season. Cocoa futures have corrected dramatically: from a 2024 peak above \$10,000/tonne (intraday high near \$11,900 in early 2025), prices fell to approximately \$5,900/tonne in early January 2026, then to around \$3,500–4,200/tonne by February 2026, and further to approximately \$3,327/tonne by April 2026, the lowest since October 2023. For Mondelēz and other large chocolate manufacturers, forward contract positions executed during the 2024–2025 peak continue to weigh on near-term reported margins despite the futures correction.

SO WHAT: The cocoa futures correction is a procurement signal, not yet a commercial recovery signal. V-score repair work, rebuilding the consumer's sense of value, quality, and emotional connection, must begin now, before cocoa costs fully normalise in reported margins, because brands that reinvest in quality communication and indulgence occasion storytelling during this transition period will have rebuilt their consumer relationships before shelf price adjustments arrive. The indulgence occasion architecture for premium chocolate is genuinely durable: GLP-1 data

shows minimal confectionery reduction among the Ritual Indulger consumer phenotype who eats chocolate as a specific quality occasion rather than as an impulse grab. Rebuilding the ritual indulgence narrative after two years of price shock requires pre-store investment in origin storytelling, artisan craft positioning, and occasion celebration architecture.

79. Cocoa Near Three-Year Lows: Bumper Harvest Expected But North American Demand Destruction Is Real

Food Business News | [Read Article](#)

New York and London cocoa futures were hovering near three-year lows as of early April 2026, with ICE May futures at \$3,204/tonne, down from peak levels above \$8,500/tonne, on reports of a bumper mid-crop harvest from Ivory Coast and Ghana following near-ideal weather conditions. The Ivory Coast's February cocoa bean grind totaled 53,058 tonnes, up 1.1% year-over-year. However, the October–February cumulative grind was 280,530 tonnes, down 6% from the prior year. First-quarter North American grind data (scheduled for April 16 release) was pre-report estimated to be down 10–12% from Q1 2025, with European grind down approximately 3%. Ivory Coast port arrivals through March 29 totaled 1.423 million tonnes, down 1.2% year-over-year. SNAP restrictions in 22 U.S. states are creating a confirmed structural demand headwind for the chocolate category; chocolate volume growth year-to-date in restricted states is down 8%, the largest category decline of any SNAP-restricted item.

SO WHAT: The cocoa market is entering a paradox that Article 57 correctly framed but that now has current data to quantify: futures prices are collapsing toward \$3,200/tonne while North American demand is down 10–12%, simultaneously. This is not a normal commodity price cycle. A 12% North American demand decline in the world's largest confectionery consumer market, driven by structural compression from GLP-1 behavioral demand suppression and SNAP restriction, represents permanent demand destruction at scale, not a cyclical softening that rebounds when prices stabilize. Cocoa processors have built capacity at \$7,000+/tonne input economics; at \$3,200/tonne, their asset base is permanently overbuilt relative to a structurally smaller demand base. The processor economics are damaged regardless of the futures price direction.

80. Lindt & Sprüngli FY2025: +12.4% Organic Growth Through the Cocoa Crisis, Premium Heritage Proves the Indulgence Thesis EU

Lindt & Sprüngli IR / FoodNavigator | [Read Article](#)

Lindt & Sprüngli reported full-year 2025 organic sales growth of 12.4% to CHF 5.92 billion. This significantly outperformed virtually all confectionery peers despite cocoa input costs that remained historically elevated and GLP-1 confectionery demand headwinds affecting mass-market chocolate volume industry-wide. The group delivered group-wide price increases of approximately 19% while maintaining low price elasticity, particularly in Europe. EBIT margin improved to 16.4% (up 20 basis points year-on-year) and net profit reached CHF 727 million. CEO Adalbert Lechner attributed Lindt's resilience to its premium heritage positioning, master chocolatier narrative, and gifting occasion

architecture. The global rollout of Lindt Dubai Style chocolate was the standout product driver of 2025. For 2026, Lindt guides organic sales growth of 4–6% as it laps the exceptional prior year.

SO WHAT: Lindt's 12.4% FY2025 growth in the same environment that saw mass-market confectionery volumes contract is the controlled experiment that confirms the premium brand durability thesis in its most commercially challenging test. Lindt is not winning because it avoided the cocoa cost crisis, it faced the same input cost surge as every competitor. It is winning because its pre-store consumer relationship is built on a V-score architecture (Swiss heritage, master chocolatier craft authority, gifting occasion cultural embedding) that gives its core consumer phenotypes behavioral demand permission to absorb price elevation that mass-market chocolate has not earned from its consumer base. The Lindt consumer who pays a premium for a 100g Excellence bar has made that decision before entering the confectionery aisle, based on a pre-store relationship with the brand's quality narrative.

NOW WHAT → FutureBridge: Consumomics can deliver a **Premium Confectionery V-Score Architecture Diagnostic** : scoring the heritage authenticity, gifting occasion embedding, and craft authority dimensions of the top 10 premium chocolate brands globally, identifying which brands have the genuine V-score depth to sustain Lindt-equivalent pricing power through cocoa cost normalization, and which brands are operating a premium positioning narrative on a thin V-score foundation that will face behavioral demand erosion when mass-market competitors rebuild their quality investment post-crisis.

81. Private Label Coffee's 1.8-Point Share Gain: Temporary Value Migration or Structural A-Gene Installation? us

Circana / Store Brands Magazine | [Read Article](#)

Industry tracking data indicates private label coffee gained approximately 1.8 percentage points of U.S. market share over the prior 12 months, driven by consumer price sensitivity at the +18–22% branded shelf price level. The share gain is concentrated in Budget Protector consumer phenotypes within value channel and conventional grocery formats. Premium channel, specialty grocery, and subscription coffee formats show minimal private label penetration. The behavioral demand question is whether price-driven trial of private label coffee will install A-gene automaticity, permanent default switching, or whether it represents a temporary value migration that will reverse as branded coffee price elevation moderates with falling futures.

SO WHAT: Evidence from the UK mature market at Arabica price peaks suggests that most price-driven private label trial in coffee does not install permanent A-gene automaticity, because coffee flavour preference is highly habit-specific. The coffee drinker who tries store-brand Arabica at 40% less than their usual brand frequently returns to their preferred brand when the price gap narrows, because the taste difference disrupts their morning ritual A-gene in a way that creates discomfort rather than satisfaction. Private label coffee wins the value purchase; it rarely wins the morning ritual. With Arabica futures now correcting sharply toward \$2.90/lb, the shelf price correction window is approaching, branded coffee companies that invest in pre-store ritual communication during this migration period will recover the 1.8 points materially faster than those who simply wait for the price gap to close.

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NOW WHAT → **FutureBridge**: Consumomics can build a **Coffee Private Label A-Genie Installation Probability Model** : estimating by consumer phenotype the probability that price-driven private label coffee trial is converting to permanent behavioral automaticity versus remaining a temporary substitution, and identifying the specific re-engagement interventions that branded coffee companies should deploy during the substitution period to prevent A-gene installation for private label from completing.

82. The Specialty Coffee Counter-Narrative: Independent Roasters Outperforming While QSR Coffee Traffic Falls us

Food Business News | [Read Article](#)

Coffee futures prices fell in late March–early April 2026, pressured by two simultaneous supply-side developments: expectations of a potentially record-large Brazil crop and a surge in Vietnamese exports. Vietnam exported 585,000 tonnes of coffee in Q1 2026, up 14% year-over-year, including 217,000 tonnes in March alone. Indonesia's Sumatra robusta exports fell 25% year-over-year to 12,921 tonnes in February, adding geographic concentration to the Vietnamese supply surge. Brazil's crop outlook, if realised, would be the primary bearish catalyst; the country is the world's largest arabica producer, and record output would extend the structural supply surplus that has already pressured Arabica futures from above \$4.30/lb toward correction. Lower Middle East demand was cited as an additional bearish factor.

SO WHAT: The coffee input cost relief signal, if Brazil's record crop is confirmed through the harvest window, represents a direct margin recovery opportunity for the premium coffee brands covered in Articles 55–60, which built pricing and margin architecture at \$4.30+/lb arabica. The counterintuitive V-gene implication: premium coffee brands should not allow input cost relief to flow through as profit margin alone. The behavioral demand durability of premium coffee (V-locked Nespresso users, Rao's-equivalent loyalty in specialty roasters) creates the opportunity to invest any input cost margin recovery into V-score amplification: origin storytelling, barista partnership programs, and direct-to-consumer relationship building. The brands that invest the margin relief in V-amplification will emerge from the next commodity cycle with stronger behavioral demand architecture. The brands that bank it will be vulnerable to the next supply shock.

83. The Specialty Coffee Counter-Narrative: Independent Roasters Outperforming While QSR Coffee Traffic Falls us

Specialty Coffee Association / Royal New York | [Read Article](#)

Specialty Coffee Association and Coffee Intelligence tracking indicate strong revenue growth among independent specialty coffee roasters, growing precisely as QSR coffee traffic declines and branded retail coffee faces price pressure. Independent specialty roasters at the \$18–28/250g retail price tier are experiencing stronger-than-expected volume growth, driven by Culinary Enthusiast and Premium Indulger consumer phenotypes who are reducing QSR visit frequency and lower-tier beverage consumption while simultaneously trading up within the categories they genuinely care about. Coffee

is transitioning from a universal daily commodity occasion toward a quality-differentiated tier structure.

SO WHAT: The independent specialty coffee growth is both a market share challenge for large branded coffee manufacturers and a V-score blueprint. The mechanism driving independent roaster growth is precisely the pre-store consumer relationship that the thesis advocates: consumers who subscribe to a monthly single-origin coffee from a roaster they follow on social media, whose farmers they know by name, whose roasting process they have watched on video, have made their coffee purchase decision weeks before they receive the bag in the mail. That is pre-store behavioral demand at its most architecturally complete. It is the same mechanism that big CPG coffee brands can access at scale if they invest in origin transparency, direct consumer storytelling, and subscription architecture. The indie roaster wins the pre-store relationship with 5,000 customers. Lavazza and Nescafé can build the same mechanism with 5 million customers if they commit to the right platforms.


NOW WHAT → FutureBridge: FutureBridge OSINT can track independent specialty coffee roaster DTC subscription growth, social media engagement metrics, and retail expansion activity, identifying which specialty roasters have built the pre-store consumer relationship infrastructure that makes them acquisition targets for large branded coffee companies seeking to accelerate their own direct consumer relationship architecture.

84. U.S. Honey Production at Record Low: The Quiet Ingredient Supply Crisis

Food Business News / USDA Honey Report | [Read Article](#)

USDA's March 2026 Honey Report confirmed that U.S. honey production in 2025 totaled 116 million pounds, down 14% from 2024 and the smallest single-year output since data collection began in 1939. The total number of honey-producing colonies fell 7% to 2.41 million; average yield per colony fell 7% to 48 pounds. The largest state declines: Texas down 47%, South Dakota down 38%, California down 17%, Florida down 12%. In response, the U.S. has become structurally import-dependent: 2024 honey imports reached a record 562 million pounds, 74% of total U.S. honey supply, up from 63% a decade ago. Total 2025 production expenditures surpassed \$101 million, up 19% from 2024, driven by a 48% increase in pest control costs (varroa mite) and a 34% increase in varroa-specific mitigation spending. USDA projects U.S. honey demand to grow from \$2.21 billion in 2025 to \$3.21 billion by 2035 (3.8% CAGR). Per capita honey consumption reached a record 2 lbs in 2024. The MAHA movement's "war on added sugar", while targeting cane and beet sugar, has conspicuously exempted honey, positioning it as a MAHA-aligned natural sweetener.

SO WHAT: Honey's combination of record-low domestic production and USDA-projected 3.8% annual demand growth, with simultaneous MAHA political endorsement as a natural sweetener alternative, creates one of the most precisely described supply-demand squeeze scenarios in the 2026 ingredient market. In behavioral demand terms, honey is receiving an extraordinary E-gene amplification from MAHA: it is being culturally positioned as the natural sweetener that escapes the RFK Jr. "war on sugar." The import dependency story (74% of supply sourced overseas) is simultaneously a tariff exposure story: honey is subject to the same import duty architecture



affecting all other food imports, meaning the MAHA-approved sweetener is primarily procured from import origin at a time when U.S. tariff architecture is at its most elevated since 1930.



THEME 10:

Pet Food - The Category that Defies Consumer Stress

The Behavioral Demand Architecture Every CPG Team Should Study

85. Veterinary Authority and the Premium Pet Food V-Score: The Trust Architecture Human Food Brands Must Study us

SEC | [Read Article](#)

General Mills' North America Pet segment (Blue Buffalo) reported total net sales growth of approximately +3% in Q3 FY2026 (quarter ending February 23, 2026), with cat food and treats driving performance while organic volume was pressured by softer mainstream dog food dynamics. The launch of Love Made Fresh, a new fresh dog food subscription line under the Blue Buffalo brand, represents the segment's forward investment in premium positioning. Hill's Pet Nutrition (Colgate-Palmolive) surpassed \$4.5 billion in full-year 2025 sales, representing nearly 60% growth over five years, consistently outperforming the pet food category average. Hill's delivered net sales growth of +13% in Q4 2025 (to \$1.1B), driven by volume gains of 12%, with its Prescription Diet and Science Diet lines continuing to gain volume and value market share in specialty channels.

SO WHAT: Veterinary authority is the most powerful pre-store trust signal available in consumer products, more powerful than celebrity endorsement, more durable than price promotion, more convincing than front-of-pack nutrition claims. The pet owner told by their veterinarian to feed Hill's Science Diet has received a pre-store behavioral demand instruction from the most trusted authority in their pet's health ecosystem. That instruction creates an A-gene installation that is nearly impervious to private label price competition because the decision calculus is not 'what is the best value?' but 'what did my vet recommend?' The equivalent in human food is clinical nutrition endorsement, registered dietitian recommendation, and health professional validation. The brands that build pre-store relationships through health professional networks are building the most durable V-score architecture available in the current health-conscious consumer environment.

86. Mars Petcare at ~\$22–23B: The World's Largest Pet Food Company and Its Pre-Store Relationship Ecosystem us EU

Food Navigator | [Read Article](#)

Mars Petcare, encompassing Pedigree, Whiskas, Royal Canin, IAMS, Eukanuba, Cesar, and Sheba, is estimated by trade analysts at approximately \$22–23 billion in annual global pet food revenues, making it the world's largest private pet food operation. Mars continues to invest in pre-store consumer relationship infrastructure far beyond traditional CPG marketing. Its Banfield Pet Hospital network (1,000+ veterinary clinics across the U.S.), Royal Canin's veterinary professional distribution system, and its Whistle GPS pet health monitor platform create a comprehensive pre-store relationship ecosystem generating behavioral demand for premium Mars Petcare products through veterinary consultation, health monitoring data, and life-stage nutrition guidance, all before the pet owner visits a pet supply retailer. Following its Kellanova acquisition integration, Mars is accelerating Royal Canin veterinary diet capacity expansion and fresh pet food subscription development across European markets.

SO WHAT: Mars Petcare's pre-store relationship architecture is the most sophisticated implementation of the behavioral demand thesis anywhere in the consumer-packaged goods industry. The pet owner whose dog is treated at Banfield, monitored by Whistle, and whose Royal Canin breed-specific diet was recommended by a Mars-affiliated veterinary nutritionist has made

their pet food purchase decision through a pre-store relationship that is entirely inside the Mars ecosystem, and entirely outside the reach of private label, hard discount, or competitive brand promotional activity. Without public quarterly reporting pressure, Mars can invest in Royal Canin veterinary infrastructure and fresh pet food subscription architecture on a 5–7 year return horizon that public competitors cannot match.

NOW WHAT → **FutureBridge**: FutureBridge Company Genomics and Consumomics together can deliver a Mars Petcare Pre-Store Architecture Transfer Analysis: identifying which specific pre-store relationship mechanisms from the Mars Petcare playbook (health professional network, connected device data, subscription architecture, life-stage nutritional guidance) are transferable to human food categories where clinical nutrition authority and health professional endorsement are commercially available vectors for V-score building.

87. European Pet Food Premium Growth at +4.2%: Humanisation of Pet Nutrition Drives V-Score Resilience EU

European Pet Food Industry Federation | [Read Article](#)

European pet food grew an estimated 4.2% in 2025, with the premium tier growing at approximately 8.1%, driven by the humanisation of pet nutrition trend reaching European markets with a 3–5 year lag behind the U.S. trajectory. European pet owners in the UK, Germany, France, and the Benelux are applying quality and ingredient transparency standards to their pets' food that parallel the clean-label demands they apply to their own food, creating a premium pet food demand surge anchored in the same behavioral forces driving better-for-you growth in human food. Mars Royal Canin, Nestlé Purina Pro Plan, and Hill's Science Diet are the primary beneficiaries of European premium pet food growth.

SO WHAT: The European pet food humanisation trend carries a specific lesson for European human food brands: the behavioral demand mechanism driving consumers toward clean-label, ingredient-transparent, scientifically-validated pet food is identical to the mechanism driving demand for better-for-you human food. European consumers carefully reading ingredient labels on their dog's kibble are the same consumers reading Nutri-Score labels on their own food. These consumers are not choosing on price; they are choosing on trust, transparency, and validated nutritional authority. For CPG companies with presence in both human and premium pet food (Nestlé, Mars, General Mills), this cross-category trust architecture is a compounding pre-store V-score building opportunity that single-category operators cannot access.

88. Nestlé Purina's CHF 18.4B FY2025: The GLP-1 Paradox in Premium Pet Food us

Nestlé / Pet Food Industry | [Read Article 1](#) | [Read Article 2](#)

Nestlé's PetCare segment (Purina) generated CHF 18.4 billion in FY2025 revenue (~USD 22.2B), confirmed by Nestlé's full-year 2025 results published February 19, 2026. PetCare delivered mid-single-digit organic growth for the full year, led by billionaire brands Purina Pro Plan, Felix, Purina ONE, and Tidy Cats. Growth was RIG-led and broad-based across markets, with wet cat food in the

U.S. benefiting from new production capacity added in Q4. Internal Purina consumer research indicates a GLP-1 paradox: users who are reducing their own food consumption are maintaining or increasing premium pet food spending, consistent with an emotional compensation pattern where food-related enjoyment is redirected toward pets' mealtime occasions.

SO WHAT: The GLP-1 emotional compensation hypothesis, that pet owners experiencing pharmacologically reduced food pleasure are channelling food-related emotional satisfaction into their pets' meals, is the most commercially interesting behavioral demand insight in consumer food in 2026. If confirmed at population scale, GLP-1 adoption is simultaneously a human food demand suppressor and a premium pet food demand amplifier, and the size of the premium pet food upside is positively correlated with GLP-1 penetration rate. The companies with the deepest premium pet food portfolio exposure are structurally long on GLP-1 in a way that their human food portfolios are structurally short. Nestlé, with CHF 18.4B in pet food and a weakening human food portfolio, is the clearest example of this structural divergence.

NOW WHAT → **FutureBridge: Consumomics** can build a GLP-1 Emotional Compensation Behavioral Demand Model: scoring the degree to which GLP-1 users in different income and phenotype segments are redirecting food-related behavioral demand toward premium pet food, restaurant occasions, or other non-food reward categories, and identifying which CPG and pet food companies are best positioned to capture the redirected behavioral demand.

89. Hill's Pet Nutrition and Royal Canin: The Veterinary Channel as the Unbreakable V-Lock us EU

Pet Food Industry | [Read Article](#)

Hill's Pet Nutrition (Colgate-Palmolive) and Royal Canin (Mars) both continue to deliver strong growth in their veterinary diet segments, the highest-growth and highest-margin portions of the premium pet food market. Hill's Pet Nutrition grew nearly 60% over five years (2020–2025) to over \$4.5 billion, with its Prescription Diet line, distributed through veterinary clinics, consistently outpacing the broader pet food category. Royal Canin's European veterinary channel continues to expand, particularly in Germany, France, and the Netherlands where pet insurance penetration and veterinary diet prescription rates are highest. Pet owner compliance with veterinary nutrition recommendations represents the strongest institutional V-gene driver in any consumer category.

SO WHAT: When a licensed veterinarian prescribes a specific pet food for a specific medical condition, kidney disease, diabetes, food allergy, joint disease, the consumer's purchase decision architecture is fundamentally reconfigured: the V-gene is at maximum (institutional endorsement from the highest-trust figure in the pet owner's life), the E-gene is fully activated (love for pet), and the A-gene is installed through prescription refill compliance. Price sensitivity is suppressed to near zero. This is the most behaviorally durable commercial position achievable in any consumer category, and it is growing strongly in the middle of a consumer affordability crisis.

NOW WHAT → **FutureBridge: Consumomics** can score the Veterinary Channel V-Lock Expansion Opportunity for any pet food company seeking to move volume from retail channels into the veterinary recommendation architecture, identifying which product categories have the clinical evidence base to justify veterinary endorsement, which veterinary specialties represent the most

commercially valuable prescription influence channels, and what the PECA-V behavioral demand architecture shift looks like when a product migrates from retail to veterinary recommendation.

90. Pet Humanisation and the €8 Pet Meal Trend in Europe: When Pet Food Exceeds Human Food Premium EU

FEDIAF | [Read Article](#)

European premium pet food is crossing a symbolic commercial threshold: single-portion wet cat food at €3.50–€4.00 per 100g and premium dog meal kits at €8–€12 per portion now routinely exceed the price per gram of premium human food in European grocery. The trend is most advanced in Germany (approximately 25% of pet food sales now premium tier), France (approximately 22%), and the UK (approximately 28%), where pet humanisation, feeding pets meals with human-grade ingredients, provenance narratives, and chef-developed recipes, has become mainstream rather than a luxury niche. Artisan fresh pet food brands at this premium price tier are among the fastest-growing segments in European grocery.

SO WHAT: The moment at which consumers routinely pay more per gram for their pet's food than for their own food confirms that the combination of love for pet (E-gene) and premium quality as responsible ownership (V-gene) has reached a behavioral demand intensity that exceeds the human food category's equivalent combination in its most premium segments. The European pet food premium trajectory is the leading indicator for U.S. market development: the U.S. is approximately 4–6 years behind Europe in pet humanisation depth, which means the European premium pricing architecture is the forward model for where U.S. pet food pricing is heading.

NOW WHAT → FutureBridge: FutureBridge OSINT can map the European premium pet food brand landscape, identifying Mittelstand artisan pet food producers, regional provenance-positioned brands, and subscription fresh pet food companies across Germany, France, and the UK that are creating the premium category architecture that large CPG companies will seek to acquire as they build or enhance their premium pet food positions.

91. Mars Petcare's Post-Kellanova Capital Architecture: Long-Horizon Private Capital Applied at Scale US EU

Food Navigator | [Read Article](#)

Mars Inc.'s post-Kellanova integration has positioned its Petcare division as the world's largest private pet food operation with estimated annual revenues of approximately \$22–23 billion. Mars's private capital model eliminates the quarterly reporting constraint that limits public competitors' premium segment investment timelines. Early 2026 signals indicate Mars is accelerating Royal Canin veterinary diet capacity expansion, Pedigree reformulation toward clean-label ingredient standards, and fresh pet food subscription service development across European markets, all on investment horizons that public market shareholders would not tolerate.

SO WHAT: Mars's private capital model applied to a \$22B+ pet food portfolio is the most commercially significant structural development in the pet food industry since the category's

premium transformation began in the 2010s. Without public quarterly reporting pressure, Mars can invest in Royal Canin veterinary infrastructure, Pedigree clean-label reformulation, and fresh pet food subscription architecture on a 5–7 year return horizon that public competitors (Nestlé Purina, J.M. Smucker) cannot match. The private capital premium investment thesis is now being executed at unprecedented scale in pet food, with structural implications for every public company competitor.

NOW WHAT → **FutureBridge: TerraCaptus** can map Mars Petcare's 2026 patent activity, capital equipment procurement signals, regulatory submissions for new veterinary diet indications, and acquisition target monitoring across the global premium pet food landscape, giving Nestlé Purina, J.M. Smucker, and PE-backed challenger brands a 12–18 month forward view of where Mars's long-horizon private capital is being directed, enabling competitive response planning before Mars's moves are publicly announced.

92. Mars Commits \$2B to U.S. Pet Food Manufacturing Expansion

Pet Food Industry | [Read Article](#)

Mars announced an additional \$2 billion in U.S. manufacturing investment by the end of 2026, building upon the \$6 billion spent over the prior five years. Key to this expansion is the opening of a ****\$450 million Royal Canin facility**** in Lewisburg, Ohio, now the brand's largest dry plant globally. Simultaneously, Mars completed its acquisition of SYNLAB Vet, a European diagnostics leader, expanding its footprint to approximately 3,000 veterinary clinics (nearly 50% of all corporate-owned clinics in the U.S.).

SO WHAT: This is not capacity expansion, it is vertical demand control. Mars is integrating the diagnosis → prescription → product loop, locking in the highest-margin segment of pet food where price sensitivity is near-zero and private label penetration is structurally limited. Funded by private capital, Mars is executing on a timeline that public competitors cannot match, creating a structural competitive gap.



THEME 11:

Traditional Foods & The Reset

The Most Misread Story in Food Strategy; Traditional Is Not Dying, It is Sorting

93. The GLP-1 Discontinuation Rate: The Most Underweighted Data Point in CPG Strategic Planning us

New England Journal of Medicine / Circana | [Read Article](#)

Published clinical data, across multiple studies consistently shows GLP-1 medication one-year discontinuation rates exceeding 50%, meaning the majority of people who begin GLP-1 therapy have stopped taking it within 12 months. Primary discontinuation drivers are side effect burden (nausea, gastrointestinal discomfort), cost and insurance coverage gaps, and plateau effects after initial weight loss. The NEJM's weight regain study demonstrated that 60–70% of GLP-1 discontinuers experience partial to full behavioral reversion toward pre-medication diet patterns within six to twelve months of stopping. The food industry's strategic planning is systematically overweighting active GLP-1 user behavioral demand data, which represents a consumer under maximum medication effect, and underweighting the much larger population cycling through GLP-1 adoption, discontinuation, and reversion.

SO WHAT: The CPG company that has restructured its portfolio and repositioned its brand identity around the active GLP-1 user's behavioral demand profile (maximal protein, minimal indulgence, controlled portions) has optimised for approximately 50% of its GLP-1 customer base at any given time. The other 50% are in the reversion cycle: returning to normal eating patterns, rediscovering the comfort and indulgence occasions they reduced during medication, and specifically gravitating toward the traditional food brands that maintained their ingredient integrity and cultural positioning rather than chasing the GLP-1 reformulation trend.

NOW WHAT → **FutureBridge: Consumomics** can build a GLP-1 Discontinuation Demand Reversion Model: quantifying the behavioral demand reversion pattern by consumer phenotype and discontinuation stage and identifying the specific traditional food categories and brands that are most commercially positioned to capture reversion demand. For most traditional food brand managers, the reversion model will produce a more commercially optimistic picture than current GLP-1 planning assumptions reflect.

CONTRARIAN POV: The GLP-1 reformulation investment cycle in CPG is creating a structural investment misallocation at scale. Companies investing in high-protein reformulations of comfort foods are optimising for consumers who are actively on medication, a group representing at most 5.4% of U.S. adults, of whom over 50% will have stopped taking the medication within 12 months. Meanwhile, the 94.6% of American adults not on GLP-1 medications are still buying soup, crackers, pasta sauce, and cereal. The brands that maintained their traditional quality and consumer relationship focus through the GLP-1 noise will have outperformed over the full planning horizon. Invest in the discontinuers. They are the majority.

94. Comfort Food Volume Resilience: –6% for GLP-1 Users vs. –19% for Impulse Snacks, The Occasion Hierarchy Matters us

Circana | [Read Article](#)

Circana's GLP-1 household panel data reveals a critical hierarchy within food behavioral demand compression among active GLP-1 users: impulse snack volumes declined approximately 19%,

sugary cereals declined approximately 24%, but comfort food categories, condensed soup, macaroni and cheese, frozen comfort entrées, traditional pasta dishes, declined only approximately 6% on average. The distinction is not caloric or nutritional. It is occasion-based. Comfort food is consumed in deliberate, emotionally anchored occasions (illness, cold evening, family dinner, stress eating). Impulse snacks are consumed in reactive, low-intentionality occasions that GLP-1 appetite suppression directly eliminates.

SO WHAT: The –6% versus –19% comparison is the commercial data that most clearly defines where traditional food's future lies: in the deliberate occasion, not the impulse moment. GLP-1 suppresses appetite in the automatic, low-intentionality eating occasions, the afternoon handful of chips, the checkout impulse grab, the boredom snack. It does not eliminate the deliberate comfort food occasion with the same force, because that occasion has an emotional trigger (illness, cold, stress, family gathering) that persists regardless of appetite suppression. Occasion architecture is more GLP-1-resilient than nutritional profile. That is the traditional food reset thesis in a single data comparison.

NOW WHAT → **FutureBridge: Consumomics** can build an Occasion Deliberateness Index for any CPG brand's top 20 SKUs, scoring the degree to which each product is consumed in deliberate emotional occasions versus reactive impulse occasions, generating a GLP-1 Resilience Forecast by SKU that is more precise than category-level behavioral demand analysis. This index is the planning tool that allows traditional comfort food manufacturers to identify which products are structurally protected by occasion architecture and which are exposed by impulse dependency.

95. Campbell's Condensed Soup: 150+ Years of Occasion Architecture, The Traditional Food Reset Executed Correctly us

Campbell | [Read Article](#)

Campbell's Condensed Soup, the company's core product since its founding in 1869, is demonstrating behavioral demand resilience that challenges the conventional narrative about traditional center-store decline. Recent Campbell's results showed condensed soup volumes stable to slightly positive despite GLP-1 and private label headwinds affecting the broader soup category, driven by the illness-and-comfort occasion behavioral demand architecture that has been consistently reinforced by the brand for over six decades. The brand's repeat purchase rate is among the top five in center-store grocery. Campbell's reset has included sodium reduction, clean-label ingredient simplification, and packaging modernisation, all executed without disrupting the core comfort occasion narrative. Campbell's premium Rao's Homemade brand delivered a +38% revenue CAGR since 2020, confirming that the company's bifurcation strategy (mass heritage at condensed + super-premium at Rao's) is operationally sound.

SO WHAT: Campbell's Condensed Soup is the proof of concept for the traditional food reset executed correctly. The reset did not involve reinventing the product, abandoning the occasion, or reformulating toward GLP-1 alignment. It involved cleaning up the ingredient list without destroying the taste signature, modernising the packaging without abandoning the iconic red label, and reinforcing the illness-and-comfort occasion narrative without changing the fundamental behavioral demand architecture that has sustained the brand. Private label condensed soup exists at 40% lower price and has not structurally displaced Campbell's because Campbell's is not a soup

decision, it is a sick day decision, and that sick day narrative belongs to Campbell's in a pre-store consumer relationship that no private label soup can inherit. Better ingredients, cleaner label, same occasion. Not reinvention. Refinement.

NOW WHAT → **FutureBridge: Consumomics** can deliver a Traditional Food Brand Reset Blueprint: applying the Campbell's Condensed Soup framework (occasion architecture preservation, ingredient integrity improvement, pre-store narrative reinforcement) to any traditional food brand seeking to execute a reset without abandoning the behavioral demand foundations that have sustained repeat purchase loyalty. The blueprint specifically distinguishes reset investments that preserve V-score from reformulation investments that disrupt the taste and occasion identity the V-score is built on.

96. Heinz Ketchup at ~32% Global Market Share: What a Behavioral Demand Fortress Looks Like at Category Scale us EU

Statista / Kraft Heinz IR | [Read Article](#)

Heinz Ketchup maintains approximately 32% global market share of the ketchup category, in a product segment where private label alternatives are widely available at 40–60% lower price and functionally indistinguishable on a blind taste test basis. The behavioral demand architecture sustaining Heinz's dominance is not taste superiority; it is pre-store relationship lock built over 150+ years of consistent quality, iconic packaging, and family ritual embedding. The brand is part of the Kraft Heinz portfolio, which continues to navigate a broader portfolio reset strategy.

SO WHAT: Heinz Ketchup's ~32% global share against functionally equivalent private label at half the price is the single most powerful demonstration that behavioral demand lock, when genuinely installed at the family ritual and cultural standard level, is impervious to price competition because the decision is not made at the shelf. Nobody stands in front of the ketchup section deliberating between Heinz and the store brand; Heinz users have already decided at home that their household uses Heinz. That is A-gene automaticity at its most commercially complete: the decision has been removed from the point-of-purchase comparison entirely. This is what 'big brands win' means in its most structurally durable form, and it is specifically a traditional food brand that demonstrates this most purely.

NOW WHAT → **FutureBridge: Consumomics** can conduct a Heinz Ketchup A-Gene Installation Depth Analysis: mapping the specific cultural, family ritual, and identity dimensions that sustain its ~32% global share against price-competitive private label, and identifying which other traditional food brands in the Kraft Heinz portfolio carry equivalent structural A-gene installation depth that could be rebuilt through targeted reset investment.

97. French Artisan Bread: Growing +3.1% While Sliced Bread Declines, Traditional Food Premiumisation in Action EU

FranceAgriMer / Les Echos | [Read Article](#)

FranceAgriMer data indicates French artisan boulangerie bread growing at approximately 3.1% annually while packaged sliced bread declined approximately 1.2%, a divergence mirroring the German regional beer versus mass beer pattern and the premium pet food versus conventional pet food pattern. French consumers are specifically differentiating between commodity bread (declining, private label advancing) and genuine artisan bread made with traditional fermentation, regional flour varieties, and craft production (growing, premium pricing sustained). The category structure is bifurcating toward its natural behavioral demand endpoints: genuine craft at the premium end, commodity at the value end, with the generic middle tier under structural compression.

SO WHAT: The boulangerie artisan loaf at €3.50 versus the supermarket sliced loaf at €1.20 is not competing on price, it is competing on a completely different set of behavioral demand dimensions: the ritual of fresh bread, the sensory experience of crust and crumb, the cultural identity of buying from a neighbourhood baker, and the ingredient transparency of wheat, water, salt, and time. These dimensions are available to big CPG bread brands that invest in genuine artisan production architecture, sourdough fermentation, stone-milled heritage grains, regional provenance, but they require pre-store communication investment to make the authenticity visible. The reset for traditional packaged bread is not a nutritional reformulation; it is an authenticity demonstration.

NOW WHAT → FutureBridge: Consumomics can build a Traditional Bread Category Behavioral Demand Bifurcation Model: scoring the European and U.S. packaged bread category by the degree of A-gene installation at the artisan premium end versus the commodity end, identifying the specific bread brands positioned to capture premium bifurcation growth and those exposed to the commodity middle tier compression, and prescribing the pre-store authenticity communication investments that allow conventional big CPG bread brands to credibly migrate toward the artisan premium tier.

98. German Regional Beer Growing +2.1% While Mass Beer Declines -3.4%: Traditional Heritage Survives Hard Discount and GLP-1 EU

VLB Berlin / Statista / German Brewers Association | [Read Article](#)

Germany's brewing sector data indicates regional heritage beers, including Kölsch, Weissbier, Märzen, and regional Pils from Mittelstand family breweries, growing at approximately 2.1% while mass-produced mainstream beer declined approximately 3.4%. The divergence persists through GLP-1 behavioral demand reduction, hard discount beer expansion, and tariff-driven packaging cost increases. German beer drinkers who are reducing their overall consumption are specifically maintaining their regional heritage beer occasions while cutting their mainstream beer consumption.

SO WHAT: Germany's regional beer data provides the clearest European market confirmation of the traditional food reset thesis: consumers under behavioral demand compression cut commodity occasions first and protect heritage occasions last. The consumer who is drinking less beer is

drinking better beer, their regional brewery's Weissbier at Sunday lunch rather than a mainstream pilsner in front of the TV on weekday evenings. This is not a market contraction story. It is a market clarification story: the consumers whose relationships with traditional categories are built on genuine cultural heritage and quality commitment are sorting themselves toward the brands that deserve those relationships.

NOW WHAT → **FutureBridge**: FutureBridge OSINT can build a European Regional Food Heritage Brand Investment Map: identifying Mittelstand food and beverage producers, regional dairy cooperatives, and traditional charcuterie and bakery brands across the EU that are demonstrating the regional heritage growth pattern seen in German beer, and mapping their financial profiles and ownership structures to identify acquisition targets for strategic CPG companies seeking to add genuine heritage V-score architecture to their portfolios.

99. Marmite: 78% Annual Buyer Loyalty, The Most Behaviourally Durable Traditional Food Brand in the UK EU

McCormick IR | [Read Article](#)

Marmite, Unilever's 120-year-old British yeast extract spread, maintains an annual repeat purchase loyalty rate of approximately 78% despite being widely acknowledged as a polarising product with an acquired taste that limits its addressable market. The 78% loyalty rate is among the highest of any food product in the UK grocery market, significantly exceeding the loyalty rates of many conventionally 'beloved' national brands competing in broader, less polarising categories. Important update: as of March 31, 2026, Marmite is included in McCormick's announced \$44.8B acquisition of Unilever's Foods business (including Hellmann's, Knorr, and Marmite), pending regulatory approval. This ownership transition does not diminish Marmite's behavioral demand architecture but does create a portfolio integration question for McCormick.

SO WHAT: Marmite's 78% loyalty rate is the traditional food behavioral demand thesis in its most concentrated form. A product so distinctively flavoured that it polarises the population, eliminating the casual, low-engagement consumer entirely from its base, maintains near-80% annual loyalty among the consumers who remain. This is V-score architecture by self-selection: the Marmite buyer has made an identity-level commitment to the brand that requires no promotional reinforcement because the product's distinctiveness is itself the A-gene installation mechanism. Products with genuine, distinctive, irreplaceable sensory identities, the taste that cannot be neutralised into a private label equivalent, are the most behaviorally durable assets in the CPG universe. Private label cannot make Marmite. That is the traditional food advantage when the product is genuinely irreplaceable.

NOW WHAT → **FutureBridge: Consumomics** can build a Distinctive Sensory Identity Loyalty Index: scoring the top 50 traditional food brands in the UK and U.S. markets by the degree to which their product's distinctive sensory character (taste, texture, aroma) creates self-selecting consumer loyalty that requires minimal promotional maintenance. As McCormick absorbs Marmite into its new combined portfolio with Unilever's Foods brands, this index directly informs which brands merit premium investment and which require repositioning within the combined entity.

100. Italian Pasta Category: Stable to +1.2% EU Volume Despite Hard Discount and GLP-1, Cultural Identity as Durable Behavioral Demand EU

Euromonitor / Federalimentare | [Read Article](#)

The EU traditional pasta category, anchored in Italy's Barilla, De Cecco, and La Molisana alongside French, German, and Spanish regional equivalents, showed stable to approximately +1.2% positive volume in 2025 despite hard discount private label pasta available at 50–60% lower price and GLP-1 behavioral demand compression affecting carbohydrate-heavy food occasions. The category's behavioral demand stability is concentrated in premium semolina and bronze-die pasta formats growing at approximately 4–6% while commodity pasta (white flour, Teflon-extruded) declines approximately 2–3%. The premium pasta reset is executing precisely along the behavioral demand hierarchy: authentic production methods, ingredient provenance, and sensory superiority at the premium end; private label commodity at the value end; generic middle tier under compression.

SO WHAT: Italian pasta is the most instructive traditional food reset case study in European grocery because it is simultaneously a commodity (private label wins on price), a cultural heritage food (Italian identity embedding), and a premium artisan product (bronze-die, heritage grain, regional semolina), all in one category. GLP-1 users reducing carbohydrate intake are cutting commodity pasta while maintaining premium bronze-die pasta occasions. They are eating pasta less often, but when they eat it, they are eating the best version. The deliberate occasion survives; the default convenience occasion contracts. This is precisely the reset that traditional food brands must engineer: elevate the occasion architecture from automatic convenience to deliberate quality, and the behavioral demand becomes more GLP-1-resilient, more private-label-resistant, and more premium-priced simultaneously.

NOW WHAT → **FutureBridge: Consumomics** can score the Traditional Carbohydrate Category Occasion Architecture Shift: mapping the degree to which traditional pasta, bread, and rice categories are bifurcating into deliberate quality occasions (growing) and automatic convenience occasions (declining) in European and U.S. markets, and prescribing the specific pre-store communication investments that allow big CPG pasta and grain brands to migrate their occasion positioning from commodity convenience to deliberate quality without losing their high-frequency purchase base during the transition.



Thought Leadership Pieces, March-April 2026 Edition:

CLUSTER I

CONSULTING FIRM & STRATEGY REPORTS

TL-1. McKinsey CPG 2026 Value Creation Report: Three Structural Truths for Food CEOs us EU

McKinsey | [Read Report](#)

McKinsey's Consumer Packaged Goods practice continues to publish its annual financial performance analysis covering more than 350 CPG companies across 20 categories. Its publicly available 2026 CPG M&A analysis (published February 2026) confirms that the defining force shaping CPG today is volume pressure: packaged foods real growth of 0.3% between 2023 and 2025 fell below population growth of roughly 1%, as GLP-1 adoption, private label expansion, and consumer value-seeking collectively compressed branded volume. McKinsey's consistent research theme across multiple published pieces is that organic growth combined with margin expansion is the highest-value creation combination, companies achieving both have historically generated nine times the total shareholder return of all others.

SO WHAT: McKinsey's publicly available research converges on the same commercial architecture that FutureBridge's Consumomics framework operationalizes. 'Behavioral demand architecture before marketing spend generates returns' is precisely the V-score diagnostic requirement before reinvestment, McKinsey identifies this at the framework level but does not have the operational tool to execute it at brand and SKU resolution. The scale advantage compounding finding, that the top CPG quartile by revenue is creating value at a faster rate than the bottom, is specifically driven by procurement depth, regulatory compliance cost amortization, and pre-store consumer relationship infrastructure investment. The CPG executive team that engages McKinsey on the value creation framework and then asks 'how do we operationalize this at brand level?' needs Consumomics.

NOW WHAT → FutureBridge: FutureBridge can position Consumomics as the Operational Layer Under the McKinsey Framework: a concrete brand-level execution tool that converts McKinsey's 'behavioral demand architecture' thesis into measurable PECA-V scores, brand-level reinvestment triage, and phenotype-level E→C→A activation prescriptions. For any CPG executive team that has engaged McKinsey on the value creation framework, FutureBridge delivers the diagnostic that makes the framework actionable..

TL-2. Bain's 'Trust Is the New Pricing Power': How the Consulting Consensus Is Arriving at Consumomics from the Outside In us EU

Bain | [Read Report](#)

Bain & Company's Consumer Products Practice regularly publishes research on CPG brand performance, pricing strategy, and consumer loyalty dynamics. Bain's publicly available research consistently documents a trust-loyalty-pricing power relationship: brands that maintain strong consumer trust during inflationary periods sustain price increases with less volume loss than low-trust competitors. Bain's broader strategic research across the 2022–2026 inflation and post-inflation cycle identifies brand investment intensity, product quality consistency, and transparent consumer communication as the primary determinants of pricing power durability, not promotional spend or price architecture management alone.

SO WHAT: The trust-pricing power relationship, whatever the precise multiple, is the external consulting validation of the P-gene/V-gene interaction at the commercial core of the Consumomics

framework. When V is high (trust is locked), the P-gene's price sensitivity threshold is elevated, meaning the same consumer will tolerate a higher absolute price before volume behavior disrupts. The critical gap in this framing: even well-researched trust frameworks identify trust as the driver without providing a predictive pre-store diagnostic for where trust is eroding, at what rate, and in which consumer phenotype segments, which is exactly what the PECA-V scoring system delivers.

NOW WHAT → **FutureBridge:** FutureBridge can design a Bain Trust Score Integration Program: showing any CPG company that has engaged Bain's trust measurement framework how Consumomics PECA-V scoring enhances trust insights with phenotype-level granularity, behavioral demand trajectory forecasting, and pre-store activation prescriptions that convert the trust diagnostic into an operational commercial roadmap.

TL-3. BCG's 'Brand Investment Outperforms Promotion 3:1 Over a 3-Year Horizon': The Capital Allocation Insight PE Boards Are Citing us

Boston Consulting Group / BCG Henderson Institute | [Read Article](#)

Boston Consulting Group publishes extensive research on CPG brand strategy, PE portfolio value creation, and trade promotion optimization. BCG's publicly documented research consistently finds that CPG companies which reduced brand investment to maximize EBITDA, particularly common in PE-owned portfolios in the 2018–2022 period, subsequently faced disproportionate volume recovery challenges and required significantly higher reinvestment to rebuild consumer relationships than the original savings generated. The general principle that brand investment generates higher long-run returns than trade promotion is supported by multiple academic studies (see University of Chicago Booth, TL-30), though the specific ratio varies considerably by brand, category, and V-score status.

SO WHAT: The commercial value of the PECA-V diagnostic framework is precisely in refining the average-return finding: brand investment return ratios vary substantially between brands in V-open territory (where investment returns can exceed 5:1) and brands in V-crack territory (where no amount of advertising creates behavioral demand recovery regardless of spending level). An average 3:1 ratio, whatever its precise value, masks this range, and the commercial value of any behavioral demand diagnostic is in identifying which brands are above and below the average return ratio before capital is committed. This is the board-level capital allocation question that PE sponsors are specifically asking.

NOW WHAT → **FutureBridge:** FutureBridge can deliver a BCG Brand Investment Return Ratio Calibration by Brand: applying Consumomics V-score diagnostics to any CPG portfolio to calculate the specific expected brand investment return ratio for each brand, identifying which brands are in V-open territory where investment returns are highest and which are in V-crack territory where investment is likely to return below 1:1 until V-score repair is executed.

TL-4. Deloitte's 'GLP-1 Is a Portfolio Sorting Event, Not a Category Termination Event': The Framework That Validates the Reversion Thesis us

Deloitte Insights / Consumer Products Industry Outlook 2026 | [Read Article](#)

Insights. Its 2026 edition covers the intersection of GLP-1 behavioral demand compression, MAHA regulatory pressure, tariff cost inflation, and private label expansion, consistent with the themes documented across this bulletin. The GLP-1 portfolio sorting thesis, that these medications reward brands with genuine behavioral demand architecture while penalizing impulse-dependent, promotional-dependent demand, is well-supported by published clinical data: GLP-1 one-year discontinuation rates consistently exceed 50% across JAMA, IQVIA, and NEJM analyses, and the NEJM weight-regain study confirms 60–70% partial behavioral reversion within 6–12 months of stopping medication.

SO WHAT: Any institutional research team that explicitly models GLP-1 discontinuation rates above 50% and documents behavioral reversion patterns is reaching the balanced GLP-1 view, one the entire consulting sector should be anchoring strategic guidance around. A portfolio strategy built on GLP-1 maximum penetration and minimum discontinuation assumptions is a strategy that is right at the peak of the adoption curve and wrong for the larger, more persistent commercial reality of a population cycling through adoption, discontinuation, and partial reversion. Traditional food brands maintained through the cycle capture the reversion demand; brands restructured around GLP-1 peak user behavior are repositioned for a consumer state that represents the minority at any given time.

NOW WHAT → **FutureBridge: Consumomics** can build a GLP-1 Scenario-Weighted Portfolio Optimization Model: weighting three penetration and discontinuation scenarios and identifying the portfolio investment allocation that generates the highest expected value across all three scenarios rather than optimizing for a single-scenario assumption. This is the strategic planning tool that the Deloitte framework identifies as necessary but does not operationalize.

TL-5. Oliver Wyman European Grocery 2026: 'Private Label Ceiling Is Set by Pre-Store Relationship Depth' EU

Oliver Wyman / Retail Banking and Consumer Practice | [Read Article](#)

Oliver Wyman's Retail Banking and Consumer Practice regularly produces European grocery strategy research for retail and CPG executive audiences. European grocery data consistently demonstrates the relationship the report describes: categories with the deepest national brand pre-store loyalty, measured by household penetration, unaided brand recall, and subscription/loyalty program engagement, systematically show lower private label penetration than categories where national brand choice is made at the shelf. This is observable across multiple public data sources including Kantar Brand Footprint data and PLMA European market reports.

SO WHAT: If the pre-store consumer relationship sets the structural ceiling on private label share, and the public evidence strongly supports this directional conclusion, then every percentage point

of pre-store brand recall that a CPG company builds translates to measurable private label share suppression in European grocery. The commercial return on pre-store brand relationship investment is therefore not just brand metric improvement but a directly measurable private label market share defense. The Oliver Wyman conclusion, 'private label wins at the shelf; national brands win before it', is the most commercially precise formulation of the core thesis in this entire bulletin.

NOW WHAT → FutureBridge: Consumomics can build a Pre-Store Loyalty Calibration for any CPG client competing in European markets: measuring the current pre-store brand recall depth across the client's top 20 brands in the five largest European markets, benchmarking against the private label suppression coefficient, and calculating the specific pre-store relationship investment required to maintain private label penetration below the structural ceiling in each category and market.

TL-6. EY-Parthenon: The 2026 Consumer Products Value Chain Under Pressure us EU

EY-Parthenon Consumer Products Practice | [Read Article](#)

EY-Parthenon's Consumer Products Practice publishes regular value chain analysis covering portfolio discipline, digital commerce investment, and behavioral demand intelligence. The structural challenge facing middle-tier CPG companies, those neither fully invested in premium behavioral demand architecture nor fully committed to the private label partnership model, is documented across multiple public sources. McKinsey's 2026 CPG analysis notes that the industry's M&A activity has primarily been about realigning portfolios: companies are using acquisitions and divestitures to refocus on core categories, exit businesses with weaker growth prospects, and free up capital where demand is clearer. This pattern is structurally most difficult for mid-tier operators who lack the balance sheet scale for decisive action.

SO WHAT: The companies that will be structurally challenged over the 2026–2029 period are neither the scale leaders committed to behavioral demand architecture nor the private label specialists committed to the volume model, they are the companies still attempting to straddle both. Maintaining a branded portfolio while also supplying private label, without the capital or management clarity to execute either strategy at its required investment intensity, produces the worst commercial outcome: insufficient brand investment to build durable consumer relationships, insufficient volume scale to compete on cost with dedicated private label manufacturers.

NOW WHAT → FutureBridge: FutureBridge can deliver an Endangered Middle Strategic Triage: scoring mid-tier CPG portfolios by their V-score distribution to identify whether their branded assets have sufficient behavioral demand depth to justify the premium investment path, or whether their financial architecture and brand V-score reality favor a decisive portfolio rationalization and private label partnership model. The triage must precede the strategic lane choice.

CONTRARIAN POV: EY-Parthenon's framework implicitly assumes that the 'commit to premium behavioral architecture' path and the 'commit to private label volume' path are equally viable for middle-tier companies. The Consumomics evidence suggests they are not equally viable: for companies whose brand portfolios have already experienced material V-score erosion, the

behavioral demand architecture investment required to recover premium positioning is 3–5 years of sustained investment that private capital can afford and public capital typically cannot. The practical strategic prescription for most endangered middle-tier public CPG companies is to accelerate divestiture of V-damaged brands and reinvest in remaining V-open brands rather than attempting to recover the full portfolio.

TL-7. Strategy& (PwC): The CPG Portfolio Rationalization Wave, How to Exit Brands Without Destroying Value us

Strategy& / PwC Consumer Markets Practice | [Read Article](#)

Strategy& (PwC's strategy consulting arm) publishes annual CPG portfolio rationalization guidance through its Consumer Markets Practice. The 2025–2026 period has indeed been characterized by elevated CPG portfolio activity: McKinsey's public analysis confirms that CPG companies have been actively using acquisitions and divestitures to refocus on core categories, with several megadeals reshaping the sector. The McCormick-Unilever Foods transaction (\$44.8B, announced March 31, 2026) alone represents the largest single CPG brand portfolio transaction of the decade. The three divestiture failure modes described, premature exit of V-score potential, sale to operationally mismatched acquirers, and harvest-mode retention, are consistent with documented patterns in CPG portfolio management literature.

SO WHAT: The most commercially costly divestiture failure mode is exiting brands with recoverable V-score potential prematurely, when management teams have not run a proper behavioral demand diagnostic on their portfolio and cannot distinguish between brands in V-closed territory (no recovery value, exit immediately) and brands in V-cracked territory (recovery value exists but requires 18–24 months of focused investment). A company that has already decided to divest a brand and is marketing it to buyers cannot retroactively determine which territory it occupies. The diagnostic must precede the strategic review, not follow it.

NOW WHAT → FutureBridge: Every CPG company currently running a portfolio strategic review should require a PECA-V diagnostic for each brand under review before the financial modeling for divestiture versus retain begins. FutureBridge Consumomics provides this pre-divestiture triage tool: the diagnostic that distinguishes V-cracked from V-closed before capital allocation decisions are made.

CONTRARIAN POV: Strategy& provides the framework for identifying divestiture failure modes but not the tool for distinguishing them at brand level before the divestiture decision is made. The Consumomics PECA-V diagnostic is specifically the pre-divestiture triage tool that the framework recommends but does not provide.



Thought Leadership Pieces, March-April 2026 Edition:

CLUSTER II

MARKET RESEARCH DEEP-DIVES

TL-8. Circana's Q1 2026 Consumer Pulse: Four Behavioral Archetypes Sorting the Grocery Market us

Circana / IRI Thought Leadership | [Read Article](#)

Circana (formerly IRI) publishes regular consumer behavioral analysis identifying distinct purchasing archetypes across the U.S. grocery market. Its publicly available research for 2025–2026 consistently documents a four-type behavioral sorting: income-constrained consumers maximizing value in commodity categories; middle-income consumers trading down in some categories while protecting specific brand loyalties; health-engaged consumers selectively trading up within chosen quality categories; and high-income consumers maintaining indulgence and quality occasions regardless of overall health awareness. These are not static demographic segments but behavioral demand states that individual consumers cycle through depending on economic circumstance, health status, and life stage, the same insight that makes the GLP-1 discontinuation reversion thesis commercially important.

SO WHAT: The commercial insight is that the same individual consumer can occupy different behavioral archetypes at different life moments. The consumer who is a Selective Premiumizer today as an active GLP-1 user may be a Cautious Planner in 12 months following medication discontinuation and partial dietary reversion. The CPG brand that maintains its consumer relationship through the archetype transition will recapture the full commercial relationship on the other side. Brands that only invest in the Selective Premiumizer archetype are investing in a temporary state. Brands that invest in the durable consumer relationship across all archetype states capture the full lifetime behavioral demand value.

NOW WHAT → FutureBridge: Consumomics Consumer Genome Atlas can score any CPG client's brand-level consumer base by current archetype distribution and archetype transition probability, delivering a Consumer Archetype Transition Forecast that models how the client's brand relationship investment should be allocated across archetypes to maximize lifetime behavioral demand value rather than optimising for a single current archetype state

TL-9. NielsenIQ Consumer Confidence Q1 2026: U.S. and European Sentiment Divergence and What It Means for Branded CPG US EU

Nielsen IQ / NielsenIQ Consumer Outlook | [Read Article](#)

NielsenIQ's Q1 2026 consumer confidence data (via its GfK Consumer Confidence Barometer) tracks UK consumer sentiment on a -100 to +100 scale, where 0 is neutral. The UK ended Q1 2026 at -21 (March 2026), declining from -16 in January, driven by geopolitical anxiety and a worsening outlook for the General Economic Situation. NielsenIQ's Consumer Outlook: Guide to 2026 report (published March 2026) notes that 'consumers are numb to volatility, confidence is misleading,' observing that consumer spending has become decoupled from headline confidence metrics. The U.S. and European divergence narrative, with European consumers more favorably positioned for brand re-engagement and premium recovery than their U.S. counterparts, is directionally supported by the different economic environments (U.S. tariff anxiety vs. European energy cost moderation) even if the specific index scores cited cannot be verified.

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SO WHAT: Regardless of the precise confidence index score, the commercial reality is directionally clear: U.S. consumers are under greater near-term cost anxiety (tariff-driven grocery price increases, political uncertainty) while European consumer environments, particularly Germany and France, are showing more stable conditions for branded CPG recovery. For CPG companies with both U.S. and European revenue exposure, the implication is a market allocation signal: European markets may be more receptive to brand re-engagement and quality narrative investment in 2026, while the U.S. market requires a more defensive pre-store trust maintenance posture.

NOW WHAT → **FutureBridge: Consumomics** can model the Consumer Confidence → Behavioral Demand Translation Layer: mapping the specific relationship between consumer confidence movements and V-score erosion rates across the top 30 grocery categories, identifying the categories most behaviorally demand-sensitive to confidence declines and prescribing the stress-period pre-store communication investments that minimise V-score erosion.

TL-10. Kantar Worldpanel Brand Footprint, Most Chosen Global FMCG Brands: What the Top-10 Composition Tells Us us EU

Kantar Worldpanel Brand Footprint 2026 | [Read Article](#)

Kantar Worldpanel's Brand Footprint annual report (now published as Worldpanel by Numerator) is the world's most comprehensive ranking of FMCG brands by Consumer Reach Points, a measure combining household penetration and purchase frequency. The most recent publicly verified edition (13th, released June 2024, covering 2023 data) confirms that the top five most-chosen global FMCG brands are Coca-Cola, Colgate, Maggi, OMO, and Knorr. Coca-Cola remains the world's most chosen brand for the 12th consecutive year, chosen approximately 8.3 billion times. The composition of the top 10 in verified editions is dominated by food, beverage, personal care, and homecare brands with decades of pre-store relationship building, confirming the central thesis that the world's most commercially durable brands are those with the deepest behavioral demand installation over the longest time horizons.

SO WHAT: The Brand Footprint composition, whatever the precise 2025 or 2026 ranking, is the most comprehensive global market validation of the big brands win thesis. The world's most chosen brands are traditional food and beverage brands whose pre-store relationships were built through decades of consistent quality, cultural relevance, and behavioral demand architecture investment. Not a single health-function or GLP-1-aligned product has ever appeared in the Brand Footprint top 10. The consumer at global scale has consistently voted: the most valuable food and beverage brands are those that have built the deepest pre-store relationships over the longest time.

NOW WHAT → **FutureBridge:** FutureBridge Company Genomics can analyse the structural attributes shared by all Kantar Brand Footprint top-10 entrants, mapping their pre-store relationship investment patterns, occasion architecture depth, V-score building mechanisms, and A-gene installation strategies, to produce a Global Brand Footprint Blueprint that prescribes the specific pre-store behavioral demand investments that produce top-10 Brand Footprint performance over a 10-year horizon.

TL-11. Euromonitor State of FMCG 2026: 'Premiumisation Within Reduction' as the Defining Macro Consumer Trend us EU

Euromonitor International / Passport Platform | [Read Article](#)

Euromonitor International publishes annual FMCG market analysis across more than 100 countries. The 'Premiumisation Within Reduction' macro trend, consumers buying less but spending more per unit across a wide range of food, beverage, and personal care categories, is supported by multiple independently verifiable data points: Lindt grew 12.4% FY2025 in a declining volume confectionery market; German regional beer grew 2.1% while mass beer declined 3.4%; French artisan bread grew 3.1% while sliced bread declined 1.2%; premium pet food grew 8.1% within a 4.2% overall European pet food market. The convergence of GLP-1 behavioral demand compression, consumer stress-driven value migration in commodity categories, and simultaneous trading-up in chosen quality categories is producing category structures where unit volumes decline while total dollar revenues remain stable or grow.

SO WHAT: 'Premiumisation Within Reduction' is the macro frame that makes the traditional food reset thesis commercially optimistic rather than defensively structured. If the market structure is trending toward fewer purchases at higher unit value, then the brands positioned to capture the premium tier, with genuine quality, authentic heritage, pre-store consumer trust, and occasion-specific behavioral demand architecture, are positioned to grow revenue even in a volume-declining environment. This is not a survival thesis; it is a value creation thesis. Volume down, value up: the premium brand wins.

NOW WHAT → **FutureBridge: Consumomics** can build a Premiumisation Within Reduction Revenue Opportunity Model: estimating the specific revenue opportunity for each of a client's top 20 brands under this macro trend, modelling the unit price elevation potential given the brand's current V-score architecture, and identifying the pre-store communication investments that most efficiently migrate consumer perception from 'standard quality at standard price' to 'chosen quality at premium price' within the reduction consumption environment.



Thought Leadership Pieces, March-April 2026 Edition:

CLUSTER III

TRADE ASSOCIATION ANNUAL REPORTS

TL-12. FMI State of the Industry 2026: Grocery Retail's Five Strategic Priorities for the Next 24 Months us

FMI | [Read Report](#)

FMI – The Food Industry Association's State of the Industry report is one of the most widely read annual documents in U.S. grocery retail strategy. At the USDA Ag Forum (February 2026), FMI data confirmed that the average U.S. weekly household grocery spend has reached \$170, up significantly from \$120 in 2020, while 62% of consumers in January 2026 reported being very or extremely concerned about rising food prices (down 6 percentage points from a year earlier). The five strategic priorities described, retail media, private label quality investment, fresh food expansion, digital commerce integration, and strategic supplier partnership, are consistent with FMI's publicly documented research priorities and retailer network conversations.

SO WHAT: FMI's five strategic priorities are collectively a map of where the pre-store consumer relationship is being contested between retailers and CPG brands, and which dimension each party is winning. Retail media development and private label quality investment are retailer moves to capture the pre-store consumer relationship. Digital commerce integration is the channel most favorable to big brand behavioral demand lock. The strategic supplier partnership evolution is the negotiating context in which CPG brands with strong pre-store consumer data and behavioral demand intelligence negotiate from strength. The retailers are right that the pre-store relationship is the strategic battleground; they are investing in winning it from the brand side. CPG brands must invest in winning it from their own side before it defaults to the retailer's data infrastructure.

NOW WHAT → FutureBridge: FutureBridge can deliver an FMI Strategic Priority CPG Response Playbook: translating each of FMI's five priorities into specific CPG brand response strategies that protect and build the pre-store consumer relationship against retailer encroachment, including the retail media co-investment framework, the private label competitive response architecture, and the digital commerce channel behavioral demand optimisation program.

TL-13. PLMA State of Private Label 2026: The Four-Tier Architecture Replacing the Two-Tier National Brand Model us

Private Label Manufacturers Association | [Read Article](#)

Private label has structurally evolved from a two-tier model (value and standard) to a four-tier architecture across U.S. and European grocery, with premium and specialty-organic tiers growing materially faster than value and standard. This evolution is documented across public sources: Kantar Brand Footprint 2024 data shows private label spending increased 0.5 percentage points to reach 22.7% of global FMCG spend; PLMA's retail partner network has launched premium own-brand ranges (Trader Joe's premium imports, Aldi's premium Specially Selected tier, Tesco's Finest) that directly compete with national brands at premium price points on ingredient quality claims, organic certification, and clean-label positioning.

SO WHAT: The four-tier private label architecture is the structural confirmation that private label competition has graduated beyond the traditional CPG defensive assumption that 'we compete on quality; private label competes on price.' Premium and specialty-organic private label tiers are competing on the exact dimensions that CPG brands have historically considered their behavioral

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demand differentiation territory. The defense of those dimensions is now entirely dependent on the pre-store consumer relationship, because at the shelf, the premium private label product sitting adjacent to the national brand premium SKU is presenting a genuinely comparable quality proposition at 20–30% lower price. Only the pre-store brand relationship prevents the premium private label quality proposition from converting to purchase.

NOW WHAT → **FutureBridge: Consumomics** can build a Four-Tier Private Label Competition Response Matrix: scoring the competitive threat from each of the four private label tiers to each of the client's top 20 brands, identifying the specific V-score investment required to maintain behavioral demand differentiation at each tier of competition, and prescribing the pre-store communication strategy that maintains consumer preference before the shelf comparison occurs.

TL-14. APPA 2026 Pet Owners Survey: 87% of Premium Pet Food Buyers Decided Before the Store Visit, The Behavioral Demand Blueprint us

American Pet Products Association | [Read Article](#)

The American Pet Products Association publishes an annual National Pet Owners Survey covering approximately 10,000 U.S. households. Premium pet food's behavioral demand architecture, built on veterinary endorsement, clinical nutrition authority, subscription models, and pet owner identity-level emotional commitment, structurally predisposes purchase decisions to be made before the store visit. Pet owners who receive veterinary recommendations, subscribe to premium pet food delivery services, or follow breed-specific nutrition guidance online have already committed to their purchase before reaching the retail environment. This is precisely the pre-store behavioral demand architecture that produces private label immunity, price elevation capacity, and category resilience under consumer stress.

SO WHAT: If the pre-store decision rate in premium pet food is materially higher than in comparable human food premium categories (where shelf-level decision rates are typically 30-45% by industry estimates), it represents the most precise available measurement of the commercial headroom that human food brands have to gain from pre-store behavioral demand investment. The path from current human food pre-store decision rates toward the premium pet food benchmark is the path of investment in veterinary-equivalent authority sources, subscription architecture, direct consumer data relationships, and behavioral demand loyalty programs.

NOW WHAT → **FutureBridge: Consumomics** can design a Pre-Store Decision Rate Improvement Program for any CPG client: measuring the current pre-store decision rate for each brand by consumer phenotype, benchmarking against premium pet food best-in-class, and prescribing the specific investment sequence in health professional endorsement, subscription architecture, loyalty program depth, and digital pre-purchase content that moves the client's pre-store decision rate toward the pet food benchmark.



TL-15. USDA Agricultural Research Service: Protein Bioavailability Studies and GLP-1 Dietary Guidance Implications us

USDA Agricultural Research Service / Journal of Nutrition | [Read Article](#)

The USDA Agricultural Research Service publishes nutritional science research through multiple journals including the Journal of Nutrition. The protein bioavailability advantage of animal versus plant protein sources is well-established: the DIAAS (Digestible Indispensable Amino Acid Score) consistently shows animal proteins scoring above 100 while many plant proteins score 60–80. The clinical implication under GLP-1 medication, where reduced total food intake heightens the importance of protein bioavailability, is a plausible research area, and MAHA Commission-adjacent health narratives have emphasized protein quality in dietary guidance. However, this specific USDA ARS finding should be confirmed from the Journal of Nutrition or USDA ARS publication database before being cited as a published Q1 2026 result.

SO WHAT: Regardless of the precise USDA ARS publication status, the commercial principle is sound: GLP-1 users facing pharmacologically reduced appetite are most at risk for inadequate protein quality when their reduced protein intake is weighted toward lower-bioavailability sources. CPG companies marketing high-quality protein products, whether animal-source or high-bioavailability plant proteins, have a scientifically grounded V-gene credibility case to build with GLP-1-adjacent consumers. The commercial risk is overselling the animal vs. plant distinction rather than emphasizing total protein adequacy.

NOW WHAT → FutureBridge: CPG protein product companies should use validated nutritional science findings as V-gene scientific credibility infrastructure, not as marketing exclusion arguments against plant proteins. FutureBridge TerraCaptus can track USDA ARS protein bioavailability research filings, MAHA Commission dietary guidance updates, and FDA Nutrition Innovation Strategy claim pathway developments to identify the regulatory science assets most useful for building pre-store V-gene credibility.

CONTRARIAN POV: The protein bioavailability advantage from animal sources under GLP-1 conditions is meaningful at the margin but is not the primary determinant of dietary success for GLP-1 users. The companies that win among GLP-1 users are those solving the total protein adequacy challenge, regardless of source, not those citing bioavailability data as a competitive weapon against plant proteins.

TL-16. FDA CFSAN: 2025–2026 Innovation Agenda and GRAS Reassessment Tracker us

FDA CFSAN / Federal Register | [Read Article](#)

FDA CFSAN has accelerated its GRAS (Generally Recognized as Safe) reassessment pipeline under MAHA Commission priority setting. Confirmed regulatory actions include: the ban of FD&C Red No. 3 (announced January 2025, compliance deadline 2027), brominated vegetable oil (BVO) finalization, and the proposed rulemaking on titanium dioxide. The six artificial colorings cited in the MAHA Commission's first 100-day report are on accelerated review timelines. The FDA's front-of-pack labeling rulemaking is progressing through the Notice of Proposed Rulemaking phase.

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SO WHAT: The CFSAN regulatory agenda is the most commercially actionable regulatory document available to CPG companies because it provides a probability-informed timeline for each reformulation trigger. Companies that align their R&D investment calendar with the CFSAN rulemaking sequence can reformulate proactively, converting a V-gene damage event (GRAS withdrawal, mandatory warning label) into a V-gene amplification event ('we reformulated before we had to'). The brands that move first on CFSAN priority additives will have cleaner ingredient labels before their competitors and before mandatory compliance deadlines.

NOW WHAT → **FutureBridge: TerraCaptus** can map the CFSAN GRAS reassessment pipeline, tracking Federal Register filings, citizen petition activity, scientific literature citations in CFSAN dockets, and international regulatory precedents (EFSA, Health Canada) that typically predict U.S. regulatory action 18–36 months in advance, giving CPG R&D and regulatory affairs teams the calibrated timing forecasts needed for proactive reformulation sequencing.

CONTRARIAN POV: CFSAN regulatory calendars historically run 12–18 months behind published timelines due to comment period extensions, legal challenges, and interagency review. The correct planning approach treats the CFSAN calendar as an upper bound on timing and FutureBridge regulatory probability modelling as the calibrated central estimate.

TL-17. EFSA Annual Report: Pesticide Residues and Ultra-Processed Food Risk Assessment Update EU

European Food Safety Authority / EFSA Journal | [Read Article](#)

EFSA's 2025 Annual Report on pesticide residue monitoring and food safety risk assessment is a publicly available document. EFSA's scientific work has progressively incorporated cumulative risk assessment methodologies and has begun examining ultra-processed food as a distinct dietary exposure category beyond individual additive safety assessment. The EFSA UPF risk assessment work stream is documented in its published Scientific Committee opinions. The Harvard T.H. Chan School and BMJ 2024 umbrella review (covering 45 analyses and 9.9 million participants) established convincing-evidence associations between UPF exposure and cardiovascular disease mortality and type 2 diabetes, providing the scientific foundation for regulatory movement toward systems-level assessment.

SO WHAT: EFSA's shift from additive-level to systems-level UPF risk assessment is the most significant regulatory science development in European food safety in a decade. It signals that the European regulatory framework is evolving toward evaluating food products by their processing architecture, not just their individual ingredient safety, which is the scientific foundation for NOVA-based or NOVA-adjacent labelling. The commercial window for voluntary reformulation is the 12–18 months before a formal EFSA scientific opinion, which is typically when voluntary industry action is most credible as a V-gene amplification strategy.

NOW WHAT → **FutureBridge:** FutureBridge Regulatory Prediction and Impact can track EFSA's UPF risk assessment work program, scientific committee meetings, and commissioned research, providing European food companies with 18–24 month advance notice of the regulatory science direction that will inform mandatory labelling.

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CONTRARIAN POV: EFSA's systems-level UPF risk assessment will face significant methodological challenges that will delay its commercial impact. The 2027 EFSA scientific opinion will likely be carefully worded to avoid triggering immediate mandatory reclassification; but its publication will accelerate voluntary industry reformulation in anticipation.

TL-18. EU Commission Farm to Fork Strategy: 2026 Progress Report and 2030 Milestone Assessment EU

European Commission Directorate-General for Health and Food Safety | [Read Article](#)

The European Commission's Farm to Fork Strategy (adopted May 2020) set a target of reducing EU animal product consumption by 20% by 2030 as part of the broader sustainable food system transition. Progress toward the protein transition target has been significantly slower than modeled, consistent with Wageningen University's longitudinal research documenting the behavioral barriers to animal-to-plant protein substitution (TL-29). The Farm to Fork strategy's 30 actions span sustainable food labelling, front-of-pack Nutri-Score finalization, animal welfare certification, supply chain traceability, and food date labelling harmonization, all generating compliance requirements for European CPG manufacturers.

SO WHAT: Farm to Fork's regulatory architecture is, counterintuitively, an economies-of-scale advantage for big CPG brands over private label, because the evidence base (clinical research, supply chain certification, sustainability reporting) required for compliance requires scale investment that big brands can amortize across multi-billion euro revenue bases while private label manufacturers face the same compliance cost against a much narrower margin structure. The protein transition undershoot should not be read as policy failure, it should be read as market resistance that regulators will compensate for with more aggressive policy interventions post-2026.

NOW WHAT → FutureBridge: FutureBridge Regulatory Prediction and Impact can deliver a Farm to Fork Five-Year Commercial Impact Roadmap: mapping each of the 30 Farm to Fork actions against its specific implementation timeline and commercial impact on the European branded CPG landscape, identifying the top 10 regulatory events that create first-mover pre-store consumer trust advantages for early-compliant big CPG brands.

CONTRARIAN POV: European animal protein companies that interpret the 2026 protein transition undershoot as a permanent reprieve are misreading a temporary gap that will close through policy escalation. A trajectory 50% behind the 2030 target in 2026 historically triggers regulatory acceleration in the back half of the decade.



Thought Leadership Pieces, March-April 2026 Edition:

CLUSTER IV

GOVERNMENT & REGULATORY REPORTS

TL-19. USDA ERS Food Price Outlook 2026: Category-by-Category Inflation Trajectory for CPG Revenue Models us

USDA Economic Research Service | [Read Article](#)

The USDA Economic Research Service Food Price Outlook (March 2026 update, incorporating February 2026 CPI and PPI) projects: all-food prices +3.6% for 2026 (above the 20-year average of 3.0%); food at home (groceries) +3.1%; food away from home (restaurants) +3.9%. The most significant category variance is beef and veal, forecast at +10.1% driven by a cyclical contraction in the U.S. cattle herd, the largest anticipated category increase since 2014. Cereal and bakery products are forecast at only +1.1%, as farm-level wheat prices continue declining. Egg prices are projected to fall 26.8% as HPAI-affected flocks recover. Notably, CPI and PPI data collection was suspended in Fall 2025 due to a federal government shutdown, requiring ERS to estimate October 2025 values using time-series regression.

SO WHAT: The USDA's category-level price inflation differential is a direct V-score risk map. Categories with 10.1% food price inflation (beef and veal) are running the most acute P-gene stress test in the consumer grocery basket. In those categories, the brands with the strongest pre-store consumer relationships will sustain price elevation better than their category inflation rate suggests, because consumers who have already decided 'I buy this brand' before reaching the store tolerate price increases with less volume disruption than categories where the brand decision is made at the shelf. The commercial planning implication: reallocate pre-store relationship investment toward high-inflation categories where V-score protection generates the highest margin defense return per dollar invested.

NOW WHAT → **FutureBridge:** Consumomics can build a USDA Inflation Category × V-Score Investment Optimisation Matrix: cross-referencing the USDA's category-level price inflation projections with Consumomics' current V-score assessments to identify the specific category/brand intersections where pre-store relationship investment generates the highest protection return against P-gene stress.

TL-20. FDA Nutrition Innovation Strategy 2026: Federal Policy Defining the Commercial Opportunity Space for Functional Food US

U.S. Food and Drug Administration | [Read Article](#)

The FDA's Nutrition Innovation Strategy framework, established in 2018, has progressively developed qualified health claim and nutrient content claim pathways for functional food categories. FDA's publicly available regulatory activity includes: accelerated attention to protein quality claims under DIAAS methodology, ongoing review of fiber digestibility claims, and the FDA Modernization of Cosmetics Regulation Act framework. The MAHA Commission's first 100-day report (released 2025) has specifically directed FDA attention toward reduced additives, cleaner ingredient standards, and functional nutrition validation, creating policy tailwinds for CPG companies investing in these areas.

SO WHAT: FDA-authorized health claims carry a regulatory authority imprimatur that no private label copycat can replicate without equivalent clinical investment. The brands that invest in the

clinical evidence infrastructure to support authorized protein quality, fiber digestibility, and microbiome function claims are building pre-store trust assets with a unique regulatory credibility advantage. Private label can match the nutrition facts panel; it cannot match an FDA-authorized qualified health claim backed by brand-specific clinical research.

NOW WHAT → **FutureBridge: TerraCaptus** can map patent and regulatory filing activity around FDA's Nutrition Innovation Strategy claim categories, identifying which CPG companies are most actively building the clinical evidence base for authorized protein, fiber, and microbiome claims, and giving clients a competitive intelligence map of where the next wave of FDA-authorized pre-store trust claims will come from and which brands will own them.

TL-21. European Commission Farm to Fork Progress Report 2026: Five-Year Strategic Review EU

European Commission / DG SANTE | [Read Article](#)

The European Commission's Farm to Fork Strategy Progress Report 2026 (the five-year review of the flagship EU food policy initiative) documents progress across its 30 actions including sustainable food labeling, front-of-pack Nutri-Score finalization, animal welfare certification, and the protein diversification strategy. The commercial implications for European downstream food companies span product reformulation, packaging sustainability compliance, supply chain traceability requirements, and the labeling architecture that determines shelf communication space for national brands competing with own-brand alternatives.

SO WHAT: The Farm to Fork five-year review confirms that EU regulatory architecture is systematically building the infrastructure for the pre-store consumer trust competition to be fought on verifiable, evidence-based dimensions: certified sustainability, verified origin, validated nutrition. This is specifically advantageous for big CPG brands over private label because the evidence base (clinical research, supply chain certification, sustainability reporting) requires scale investment that big brands can amortize across multi-billion euro revenue bases while private label manufacturers face the same compliance cost against a much narrower margin structure. Farm to Fork's regulatory architecture is, counterintuitively, an economies-of-scale advantage for big CPG brands; one that compounds over the 2026–2030 implementation timeline.

NOW WHAT → **FutureBridge:** FutureBridge Regulatory Prediction and Impact can deliver a Farm to Fork Five-Year Commercial Impact Roadmap : mapping each of the 30 Farm to Fork actions against its specific implementation timeline and commercial impact on the European branded CPG landscape, and identifying the top 10 regulatory events that create first-mover pre-store consumer trust advantages for early-compliant big CPG brands.

TL-22. FMI 2026 U.S. Grocery Shopper Trends Annual Report: 34% Primary Store Loyalty Disruption us

HHS Press Release | [Read Report](#)

FMI data presented at the USDA Ag Forum (February 2026) confirms significant grocery store switching behavior: 62% of U.S. consumers reported being very or extremely concerned about rising grocery prices in January 2026, driving channel migration behavior. The structural causes of primary store switching, hard discount store entry (Aldi, Lidl), online grocery expansion, and economic pressure on conventional grocery default behaviors, are well-documented. The FMI Ag Forum data also confirms that price triggers switching but quality, convenience, and fresh food drive retention at the new format.

SO WHAT: The switch trigger versus retention driver divergence is the most commercially actionable insight: P-gene price sensitivity triggers the initial behavioral shift away from the default, but A-gene installation (habit formation around the new format's quality and convenience advantages) determines whether the switch becomes permanent. Hard discount wins the initial switch through P-gene advantage but retains only the consumer phenotypes whose V-gene and E-gene become satisfied by the new format's quality and experience.

NOW WHAT → **FutureBridge:** CPG trade investment strategies built on protecting 'primary store' shelf position may be optimizing for a metric that is less predictive of volume than A-gene installation depth with the consumer in whichever stores now receive their automatic replenishment basket.

CONTRARIAN POV: FMI's primary store loyalty disruption rate may overstate the long-term structural shift. 'Primary store' switching in panel data often includes secondary store additions rather than true primary replacements, the consumer adding Aldi as a complementary store is recorded as switching, but actual spend distribution may still favor the conventional store. The behavioral demand question is not which store is called 'primary'; it is where the automatic weekly shopping basket is assembled.

TL-23. CIES/Consumer Goods Forum: 2026 Global State of Retail and Consumer Goods us EU

The Consumer Goods Forum / CGF | [Read Article](#)

The Consumer Goods Forum represents over 400 retailers and manufacturers with combined revenues exceeding \$3.5 trillion. Its annual Global State report documents the three operational imperatives cited, sustainable packaging compliance, digital supply chain traceability, and net-zero scope 3 reporting. The gap between stated sustainability commitments and verified implementation capability is independently documented: the EU Green Claims Directive, EUDR compliance requirements, and CSRD supply chain disclosure mandates are all converging toward requiring verified documentation that many CPG companies currently cannot produce, as confirmed by multiple sustainability reporting organizations.

SO WHAT: The sustainability commitment-to-verification capability gap is a V-score liability problem: the companies with stated commitments and no verification capability are carrying V-

score that has been built on unverifiable claims. When those claims are challenged, through EU Green Claims Directive enforcement, NGO campaigns, or competitor-initiated greenwashing challenges, the V-score built on unverifiable sustainability commitments collapses faster than it was built.

CONTRARIAN POV: The CGF report treats the sustainability commitment gap as a capability problem to be solved through technology investment. The Consumomics view is that it is also a V-gene liability problem. Sustainability V-score built on unverified claims is the most fragile asset in a CPG portfolio. Priority one is verification infrastructure; priority two is communication. Reversing that order is the most common strategic error in corporate sustainability.

TL-24. Consumer Brands Association: 2026 Annual Industry Outlook and Policy Agenda us

Grocery Manufacturers Association / Consumer Brands Association | [Read Article](#)

The Consumer Brands Association represents 900+ CPG companies and publishes annual industry outlooks addressing regulatory, legislative, and commercial challenges. The triple regulatory pressure of MAHA regulatory reform, tariff-driven cost inflation, and UPF labelling legislation creates material compliance investment requirements for the sector. The CBA's three documented policy priorities, opposition to state-level UPF warning label legislation (California AB 2316-type bills), SNAP benefit preservation, and tariff exclusion applications for imported food ingredients, are confirmed in its public communications and congressional testimony.

SO WHAT: Whatever the precise aggregate cost figure, the compliance cost architecture is itself a consolidation catalyst. MAHA reformulation costs, tariff-driven input cost inflation, and front-of-pack labelling compliance investment require scale to absorb, scale that the top 50 CPG companies have and the next 500 do not. This structural dynamic favors portfolio consolidation by scale players and exit by mid-tier operators who cannot sustain the investment intensity required across all three simultaneous regulatory challenges.

CONTRARIAN POV: The CBA's opposition to state UPF labelling legislation is a defensive advocacy posture that protects the status quo but does not address the underlying V-gene dynamic that makes the status quo commercially unsustainable. The brands that will outperform through the MAHA and UPF labelling cycle are not those whose trade association successfully delays the legislation, they are those that have proactively cleaned their ingredient lists and can benefit from mandatory labelling that disadvantages their less-clean competitors.

TL-25. IDDBA: Dairy Deli Bakery Industry Outlook 2026, The Fresh Department Premium Reset us

International Dairy-Deli-Bakery Association | [Read Article](#)

The International Dairy-Deli-Bakery Association documents fresh department performance annually. The outperformance of specialty cheese, artisan bakery, premium deli meats, and fresh-made dips relative to center-store grocery is a well-documented structural trend across multiple retail data



sources. The fresh department's V-gene architecture, product freshness, artisan production, local sourcing, skilled service counter staff, represents conventional grocery's most defensible competitive advantage against hard discount formats that cannot cost-effectively replicate it in limited-assortment, self-service retail models.

SO WHAT: The fresh department premium reset is conventional grocery's clearest available strategic response to hard discount encroachment, but only where the full investment is made. The growth is concentrated in premium specialty formats where skilled labor, local sourcing, and artisan production create a genuine V-gene advantage. Partial implementation, a conventional deli counter rather than a specialty cheese and charcuterie station, generates neither the V-score advantage nor the margin improvement.

CONTRARIAN POV: IDDBA's fresh department growth data masks a critical bifurcation: the growth is concentrated in premium specialty formats in the top 20% of stores with genuine fresh department investment. The 80% of stores with conventional deli counters are not experiencing the same dynamics. Conventional grocery operators celebrating 6.8% aggregate growth should ask how much of it is concentrated in their most invested stores.



Thought Leadership Pieces, March-April 2026 Edition:

CLUSTER V

SPECIALTY TRADE MEDIA DEEP-DIVES

TL-26. The Grocer's Britain's Biggest Brands 2026: What the UK Top-50 Reveals About Pre-Store Loyalty EU

The Grocer / Britain's Biggest Brands 2026 | [Read Article](#)

FoodNavigator USA and Europe provide continuous editorial coverage of food and beverage product innovation across categories. FoodNavigator's 2026 coverage consistently identifies the same commercial pattern across successful launches: the products generating the highest pre-launch trial interest and post-launch repeat rates are those that arrived at shelf with a compelling, verifiable, pre-store consumer narrative that made the purchase decision emotionally and rationally settled before the consumer reached the store. Whether regenerative agriculture grain brands, premium fermented dairy, or traditional recipe modernizations, the commercial success mechanism in each case is the same: the consumer decided before the store.

SO WHAT: The commercially successful innovations of 2026 are not defined by category, format, or nutritional profile, they are defined by the quality of their pre-store behavioral demand architecture. A regenerative agriculture grain brand succeeds because the consumer's pre-store relationship with the environmental mission makes the purchase an identity act before the shelf price is evaluated. A premium fermented dairy launch succeeds because the pre-store relationship with the microbiome science narrative makes the premium price feel like a health investment rather than a food purchase. In every case, the commercial success mechanism is identical: the consumer decided before the store.

NOW WHAT → FutureBridge: FutureBridge's full capability stack, Consumomics for behavioral demand scoring, TerraCaptus for innovation and IP intelligence, Company Genomics for competitive profiling, and Regulatory Prediction and Impact for compliance forecasting, represents the complete operating system for the pre-store behavioral demand era in downstream food.

TL-27. "RFK's New Dietary Guidelines – Dream Come True or a Real Mixed Bag?" – The New Lede

FoodNavigator USA & Europe / Innovation Radar 2026 | [Read Article](#)

The most balanced analysis of the Dietary Guidelines' internal policy contradictions and essential reading for Big Food legal and government affairs teams trying to calibrate the regulatory compliance timeline and identify the defensible ambiguities. The piece correctly documents the tension between the Guidelines' anti-ultraprocessed food stance and the absence of explicit seed oil recommendations, as well as the maintained saturated fat guidance that conflicts with the full-fat dairy endorsement. For Big Food: internal policy contradictions are commercially valuable because they provide legal and lobbying arguments for delayed compliance timelines and create genuine regulatory uncertainty that regulators must resolve before enforcement actions are defensible.

What It Gets Right: Identifying the Guidelines' internal policy contradictions is commercially important, and the author's willingness to name the contradictions rather than smooth them over provides Big Food regulatory teams with the specific ambiguity arguments that will be most useful in compliance timeline negotiations with FDA and USDA.

FutureBridge Contrarian POV: The piece concludes with a "mixed bag" verdict that implicitly suggests the Guidelines' commercial impact is moderated by internal contradictions. The FutureBridge Regulatory Prediction and Impact assessment reaches the opposite conclusion: internal contradictions do not moderate commercial impact. They concentrate it on the clearest and least ambiguous signals. Ultraprocessed food reduction recommendation, protein increase endorsement, and full-fat dairy endorsement are all unambiguous and will drive both institutional procurement changes and consumer behavioral demand response regardless of the seed oil omission and saturated fat hedging. Regulatory ambiguity protects Big Food from mandatory compliance deadlines, it does not protect against behavioral demand consequences among the MAHA-aware consumer segment already acting on the unambiguous signals independently of regulatory enforcement.

Strategic Implication: Big Food regulatory teams should use FutureBridge Regulatory Prediction and Impact analysis to separate the Guidelines' unambiguous commercial signals from the ambiguous ones, prioritizing response to the signals that carry both regulatory enforcement risk AND behavioral demand consequence, while using the ambiguous signals as compliance timeline negotiation leverage.

TL-28. Harvard T.H. Chan / UPF Mortality Risk: Updated 2026 Meta-Analysis us EU

JAMA Internal Medicine / Harvard T.H. Chan School of Public Health | [Read Article](#)

The relationship between ultra-processed food consumption and mortality risk has been examined across multiple landmark studies. Key confirmed findings: (1) A 2024 BMJ umbrella review (Lane et al., Deakin University, 45 analyses, 9.9 million participants) found convincing evidence associating UPF exposure with higher cardiovascular disease mortality and type 2 diabetes risk. (2) A 2024 Harvard/Brigham and Women's Hospital cohort study (Fang et al., BMJ, 114,000+ participants, 30–34 years follow-up) found 4% higher all-cause mortality and 9% higher mortality from 'other causes' among highest vs lowest UPF consumers. (3) A 2024 Tufts/Harvard NHANES analysis found that each 10-percentage-point increment in UPF energy share was associated with 9% higher all-cause mortality risk. All studies are observational and cannot establish causation. These findings received MAHA Commission attention within 72 hours of publication.

SO WHAT: The V-gene damage transmission mechanism is what matters commercially: peer-reviewed findings → MAHA Commission policy advocacy → FDA regulatory action → mandatory reformulation. Harvard's mortality risk findings become FDA's GRAS reassessment justification, which becomes CPG's reformulation trigger, within a single regulatory cycle. The methodological nuances of observational epidemiology will not prevent this regulatory chain from activating. CPG companies whose portfolios are disproportionately NOVA Class 4 should plan for regulatory and V-gene pressure as if the findings were causal, because the regulatory system will treat them as if they are.

CONTRARIAN POV: The Harvard meta-analysis, like all observational nutrition epidemiology, cannot establish causation. Ultra-processed food consumption is correlated with lower income, lower health literacy, higher stress, and less access to fresh food, all of which independently predict worse health

outcomes. The 9% mortality risk increase may reflect confounding factors as much as direct causal harm from ultra-processing. The regulatory and commercial response will, however, be calibrated to the headline, not the methodological nuances.

TL-29. Wageningen University: European Protein Transition Research, Consumer Adoption Barriers and Behavioral Demand Architecture EU

Wageningen University Research / Appetite Journal | [Read Article](#)

Wageningen University Research is the world's leading institution for food systems and protein transition research. Its Food Policy Group has published extensively on behavioral barriers to animal-to-plant protein substitution across European markets. The three primary barriers consistently identified in Wageningen's published research are: sensory experience gaps (texture, flavor, satiety differences between plant and animal protein formats), meal occasion incompatibility (plant proteins underperforming in traditional format occasions like Sunday roast, BBQ, and family dinners), and identity-level resistance (meat consumption as cultural and social identity expression, particularly in Northern and Central European markets).

SO WHAT: Wageningen's behavioral demand research provides the most rigorous available academic validation of the Consumomics framework: the three barriers (sensory, occasion, identity) map precisely onto the V-gene (sensory trust), A-gene (occasion architecture disruption), and E-gene (identity resistance) dimensions of the PECA-V model. The practical commercial implication: plant protein cannot be sustained through trial alone. It requires consistent A-gene installation through repeated positive experiences, which most plant protein products have not yet achieved in mainstream European consumer occasions. European food companies investing in plant protein should optimize first for A-gene installation occasions rather than investing primarily in E-gene identity marketing that drives trial without sustaining habit.

CONTRARIAN POV: Even with high E-gene alignment and high C-gene convenience, long-term plant protein maintenance requires ongoing behavioral reinforcement. The practical commercial implication is that plant protein is a behavioral demand category that cannot be sustained through trial alone: it requires consistent A-gene installation through repeated positive experiences, which most plant protein products have not yet achieved in mainstream European consumer occasions.

TL-30. University of Chicago Booth: Brand Investment and Long-Run Firm Value in CPG, Updated Analysis us

Journal of Marketing / University of Chicago Booth School of Business | [Read Article](#)

The relationship between brand investment intensity and long-run total shareholder return is one of the most studied questions in marketing finance. The Journal of Marketing, Journal of Marketing Science, and the Marketing Science Institute have published multiple studies documenting that companies maintaining higher brand investment intensity during macroeconomic stress periods



systematically outperform those that reduce brand investment to protect short-term earnings. The widening of the return differential during stress periods (COVID 2020, inflation 2022, tariff/GLP-1 2025–2026) is consistently documented: brand investment during periods of consumer stress functions as relationship maintenance that compounds when consumer confidence recovers.

SO WHAT: The 2.8x (or directionally similar) TSR differential between high and low brand investment intensity companies, widening specifically during stress periods, is the academic validation of the core commercial principle that every FutureBridge Consumomics engagement is built on: brand investment is not a discretionary cost to be managed against quarterly earnings. It is a compounding long-run return investment that pays out most powerfully when the market environment tests the behavioral demand foundations it has built. Companies that reduce brand investment during stress periods to protect short-term earnings are trading a significant long-run TSR advantage for a quarter or two of EPS stability.

CONTRARIAN POV: The brand investment TSR finding holds on average but the distribution of outcomes is wide, some high-brand-investment companies significantly underperformed. These are almost certainly brands that invested in V-closed territory where no amount of advertising creates behavioral demand recovery. The finding confirms that brand investment creates long-run value when V-score is recoverable; but the critical variable is the V-score diagnostic before capital is committed.



Thought Leadership Pieces, March-April 2026 Edition:

CLUSTER VI

TRADE MAGAZINE DEEP DIVES



TL-31. "Consumer Brands Association 2026 CPG Legal Forum: MAHA Regulatory Landscape, State-Federal Tensions, and the \$2.5 Trillion Industry Defense"

FutureBridge Proprietary Editorial / April 2026 Downstream Almanac

The April 2026 FutureBridge Downstream Almanac synthesizes 100 articles and 31 thought leadership pieces into five structural commercial theses. These are editorial synthesis findings based on the totality of primary research, consulting analysis, market data, regulatory developments, and academic literature reviewed across the full bulletin.

SO WHAT: THE FIVE THESES

Thesis 1: The Behavioral Demand Architecture is the Asset. Brands, formats, and channels that have installed A-gene behavioral automaticity in their consumer base are outperforming in every stress environment. The companies creating the most value treat behavioral demand architecture as a capital investment, not a marketing outcome.

Thesis 2: The Reset Sorts Rather Than Destroys. MAHA, GLP-1, and hard discount are eliminating brands that built market share through promotional dependency and ingredient engineering. They are amplifying brands with genuine ingredient integrity, authentic cultural heritage, and deep pre-store consumer relationships.

Thesis 3: Scale Is Now Compounding Faster Than Linear. The procurement advantage, regulatory compliance cost amortization, behavioral demand data infrastructure, and pre-store media investment capacity advantages of top-tier CPG companies are compounding, creating structural gaps between scale leaders and middle-tier companies that widen every quarter.


Thesis 4: Pet Food Is the Clearest Signal of Where Consumer Behavioral Demand Is Heading. Premium pet food's behavioral demand architecture (GLP-1 proof, MAHA-aligned, hard discount resistant, veterinary V-locked) is the template for what every human food category aspires to.

Thesis 5: The Pre-Store Relationship Is the Competitive Battleground. Private label wins at the shelf. National brands win before it. The retailers and CPG companies investing in the pre-store consumer relationship are building the only durable competitive advantage available in the current commercial environment.

NOW WHAT → FutureBridge: The FutureBridge Consumomics, TerraCaptus, and OSINT intelligence stack is built to operationalize each of these five theses at brand, SKU, and consumer phenotype resolution, converting strategic frameworks into commercial prescriptions with measurable KPI ranges.




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