

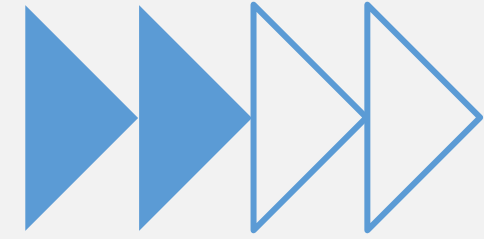


Member Technical Drop-in Clinic

Health: Unblocking what's stalling progress

Key Takeaways | June 2026

Key themes



**1 Health moves
from trend to
accountability**

**2 Incentives are the
blocker**

**3 Consumer
behaviour is
shifting**

**4 Marketing shifts
from claims to
behaviours**

**5 Portfolio is the
battleground**

**6 Trade-offs are
now
unavoidable**

Health moves from trend to accountability

- HFSS restrictions now shaping promotions and ranging
- Nutrient Profiling Model (NPM) consultation increasing scrutiny
- Health metrics and reporting expectations emerging
- UPF scrutiny rising across media and policy

Health is now measured, compared and exposed



Incentives, not intent, are the blocker

- Commercial KPIs still reward volume, margin and price
- Health goals clash with category and promotional mechanics
- HFSS and NPM are external forcing mechanisms
- Progress remains uneven without commercial incentive change

Health will not scale until incentives shift



Consumer behaviour is shifting, but unevenly

- GLP-1 changing appetite and portion assumptions
- Functional snacking growing around satiety, strength and convenience
- Fibre gap persists vs protein-led narratives
- Cost pressure shaping everyday choices

Demand is real, but not predictable



Marketing cannot carry the shift alone

- “Healthy” claims under greater scrutiny
- HFSS limiting how products are promoted
- UPF debate reshaping consumer context
- Health-led convenience and defaults growing

Health must be built into the offer, not just the message.



The core portfolio is the battleground

- Nutrient profiling shaping reformulation decisions
- Core ranges under increasing scrutiny
- Suppliers critical to delivering claims, compliance and reformulation
- Health-led innovation needs to move beyond niche ranges

Health scales through the core, not the edge



Trade-offs are now unavoidable

- Health, sustainability and supply chains converging
- Affordability pressures intensifying decisions
- Hard category shifts becoming more visible
- Internal tensions across functions increasing

The hardest decisions are still being delayed



The gap is decision-making, not knowledge

- Health pressure is now showing up in the commercial model – demand, conversion, reformulation, affordability and growth
- Members are not asking for more information on the rules; they need help deciding where to act first
- The real challenge is turning health into clearer portfolio, pricing, product and trade-off decisions

Health is a leadership and operating challenge, not just a technical or compliance issue

58%

said consumer demand and conversion is where health pressure is showing up the most – ahead of reformulation, claims, reporting and pricing pressure.

33%

said knowing where to prioritise was where they were least confident. Closely followed by other confidence gaps around turning health into commercial growth and aligning health with affordability.

Health accountability has no natural owner

- Cross-functional governance is still the exception, not the norm
- Health decisions need commercial, technical, regulatory and supplier voices in one room
- Without clear ownership, good ideas get blocked too late in the chain
- A named health outcome owner is often missing

Ownership has to be built, not assumed

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I can usually tell very quickly whether a business is set up to deliver health. You only need to look at what is getting funded, rewarded and promoted.

Charlotte Radcliffe, RNutr

Three moves to turn health pressure into action

Members do not need more noise on health. They need a practical route from pressure to decisions.

That means moving from broad ambition to three practical disciplines: evidence, prioritisation and ownership.

01

Start with evidence

Create one clear view of nutrition data, claims, HFSS/NPM status, specs and supplier document to support prioritisation, decision-making and action.

02

Scale through the core portfolio

Focus on high-volume, everyday products, not niche ranges where health impact, commercial exposure and feasibility overlap

03

Build cross-functional cadence

Name an owner and create a standing forum across commercial, technical, regulatory, sustainability and supply.

Turning health ambition into action takes the whole system

Health starts on the farm and finishes on the shelf. Healthier soils, resilient farms, product development, retail choices and public health outcomes are all connected.

The challenge is not a lack of ambition. It is how to align the people, decisions and trade-offs needed to make healthier choices easier, affordable and commercially viable.

This is where FFM can create the space for practical progress – connecting the right voices, surfacing the real blockers and helping members move discussion to action.

Capture the advantage.

FFM brings together the farmers, manufacturers, retailers, suppliers and health/NPD leaders to explore what it takes to turn health ambition into products, ranges and decisions that can work in practice.

Talk to us to prioritise your next health decision

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**Turning food system complexity
into confident action**

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