CONSUMED: NUTRITIONAL BEHAVIOUR INDEX

January 2026

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"At Danone, we are committed to bringing health through food to as many people as possible"

Yet, as our new report reveals, consumers are navigating conflicting messages and unclear advice, with no clear definition of what "healthy" really means. The result? Confusion and missed opportunities to make better food choices.

JAMES MAYER
President – Danone North Europe

To better understand these challenges we surveyed 5,000 UK adults and consulted 200 dietitians and nutritionists. The findings are clear. Both consumers and health professionals agree current efforts to support healthy eating are not enough.

Government and industry need to work together

Our research shows that without a clear and consistently applied science-based definition of 'healthy,' both consumers and industry will continue to face uncertainty and confusion.

The UK food system is at a pivotal moment. The NHS 10 Year Health Plan rightly places a greater emphasis on preventing illness and recognises the role of good nutrition linked to improved health outcomes.

This, along with other government policies is a positive step towards driving a healthier nation. For example, the Government's Healthy Food Standard, which requires large food businesses to report on sales of healthier products, is providing transparency within the industry and will help shape future health policy – a change Danone has championed.

However, we're concerned that other recent policy proposals, once implemented, may not help consumers make healthier choices. For example, the proposal to expand the scope of what counts as high fat, salt and sugar (HFSS) could inadvertently reclassify the likes of fruit yogurts and bran cereals, from 'healthy' to 'unhealthy'. The new HFSS model could undermine years of progress by industry to reformulate foods in line with standards previously set by the Government. Such changes risk adding to the confusion rather than giving the clarity consumers need, given anything from chocolate bars and crisps to yogurts and cereals would be considered unhealthy.

This challenge is mirrored in the ongoing confusion around the term Ultra Processed Foods (UPF). UPF has become widely used in media and social media despite there being no universally agreed definition, and it being highly contested by nutritionists.

According to our research 72% of consumers believe that processed food is unhealthy, despite there being no consistent scientific evidence to support this. However, the nutritionists and dietitians we spoke to said that the level of food processing is not among their top 10 considerations for what constitutes a healthy diet, and consumers should instead focus on the nutritional value of food.

Government, industry and health professionals must continue to work together to guide policy, turn clarity into action and define "healthy" in a way that is clear, consistent and actionable.

Placing emphasis on whether a product is processed, rather than considering its nutritional value, has led to confusion among consumers. Products that are enriched with beneficial nutrients—such as fibre, protein, vitamins, and minerals—play an important role in a balanced diet and should not be categorised alongside those high in added fats, salt and sugars.

These examples highlight that without a clear definition of 'healthy' grounded in nutritional value, we risk making it harder for consumers to make healthier choices.

This report is a call to action. The goalposts need to stop shifting and we need a unified definition of healthy that works for everyone. For any future changes government, industry and health professionals must continue to work together to guide policy, turn clarity into action and define "healthy" in a way that is clear, consistent and actionable.

Action needed to support healthier choices

The Consumed: Nutritional Behaviour Index aims to shed light on consumer attitudes and behaviours around healthy eating over time, while exploring consumer understanding of how government and industry are supporting healthier diets.

The findings reveal widespread confusion about what constitutes healthy food, alongside a growing demand for clear and simple guidance.

While steps have been taken by the Government and industry to support healthier choices, consumers are still calling for more action to make healthy eating easier and less confusing. Dietitians and nutritionists agree and overwhelmingly say not enough is being done.

Our research shows that:

2 in 3

consumers (66%) want further action from government to support healthy eating.

Of this group, the most supported measure is to **define what constitutes healthy food**

reflecting **public confusion**

and the need for a **clear definition of what healthy is,** alongside **greater transparency**

59%

of dietitians and nutritionists say one of the main barriers consumers face when trying to maintain a healthy diet is a lack of understanding about what is and isn't healthy

say government could be doing more

89%

"The food and drink industry could also do more to help consumers make healthier choices"

90%

Consumers want clarity and consistency

1 Clarity and simplicity matter when choosing food.

65%

of **consumers** say "clearer nutritional labelling" would help them make healthy choices.

94%

of **dietitians and nutritionists** say that "most people want simple guidance".

2 The story on food processing is confusing.

Many UK adults believe processed food is unhealthy

72%

But 38% say fortification makes them more likely to buy a product.

38%

This suggests that some form of processing, such as adding vitamins or minerals, is seen as positive, and that a longer ingredients list doesn't necessarily mean a food is less healthy. When asked what individuals should focus on when trying to eat healthily, nutritionists and dietitians see consumption of "ultra processed foods"[1] (UPFs) as less of a priority than consuming more fruit and vegetables.

3 Amid information overload, trusted sources matter.

91%

of **dietitians and nutritionists** agree that "most people are overwhelmed with the amount of information" when it comes to healthy eating.

For **consumers**, nutritional labels are far more trusted than sources such as influencers and social media for health information.

4 There's appetite for reformulation and restrictions.

64%

of **consumers** say reformulating products would effectively help them make healthier choices.

91%

of **dietitians and nutritionists** back further restrictions on the promotion or availability of HFSS products.

Overall, consumers want clarity and consistency to help navigate a landscape of confusing messages and changing advice.

[1]Described in the survey as a type of food that has been industrially modified

On processed foods, there's confusion

The survey reveals widespread confusion among consumers around food processing.

While almost half (47%) have avoided buying or consuming food they consider a UPF, only 59% of consumers say they understand the term at least somewhat. As many as 88% of dietitians say that most consumers don't fully understand what UPFs are.

The results also suggest that not all consumers view processing in the same way. Some consumers are cautious about processing, while others recognise the benefits processing can provide, More than two-thirds (72%) believe processed food is unhealthy, yet nearly half (45%) of consumers are more likely to buy foods that offer additional benefits, such as protein or fibre.

38% of consumers say they are more likely to buy food fortified with vitamins and minerals, which often involves processing. In both cases, this is higher than those who prefer unprocessed foods (28%).

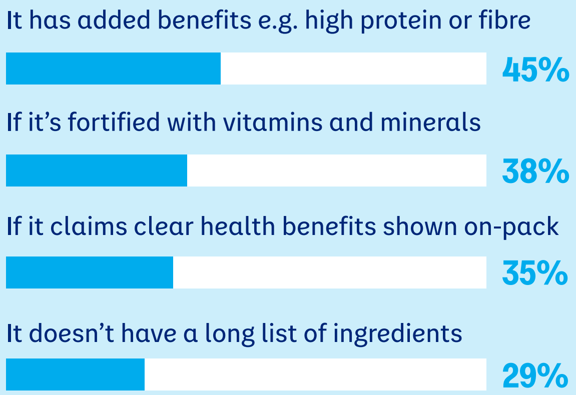
Experts see UPFs as a reference point, not a focus

Meanwhile dietitians and nutritionists take a holistic view about what constitutes a healthy diet, Overall, the level of processing in a food is not in their top 10 considerations for a healthy diet. While 47% say reducing UPFs should be a priority, they place far more emphasis on nutritional balance, including prioritising fruit and vegetables (89%), hydration (85%) and fibre (84%).

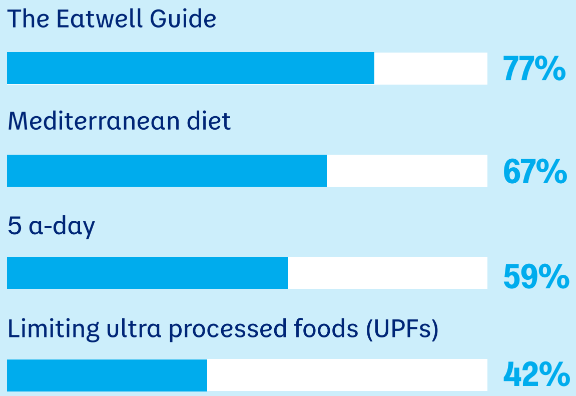
> **"There is no universally agreed definition of UPFs among scientists and academics, and the terminology can create unhelpful confusion for shoppers."**

- Niamh Brannelly -
Head of Nutrition and Science Communication,
Danone UK & Ireland

WHICH, IF ANY, WOULD MAKE CONSUMERS MORE LIKELY TO BUY A PARTICULAR FOOD OR DRINK PRODUCT?



WHICH OF THE FOLLOWING TERMS OR FRAMEWORKS DO NUTRITIONISTS/ DIETITIANS CURRENTLY USE AS A REFERENCE POINT IN THE WORK THEY DO?



Changing the recipe: Consumers want less sugar, salt and fat

Adults are trying to eat healthily

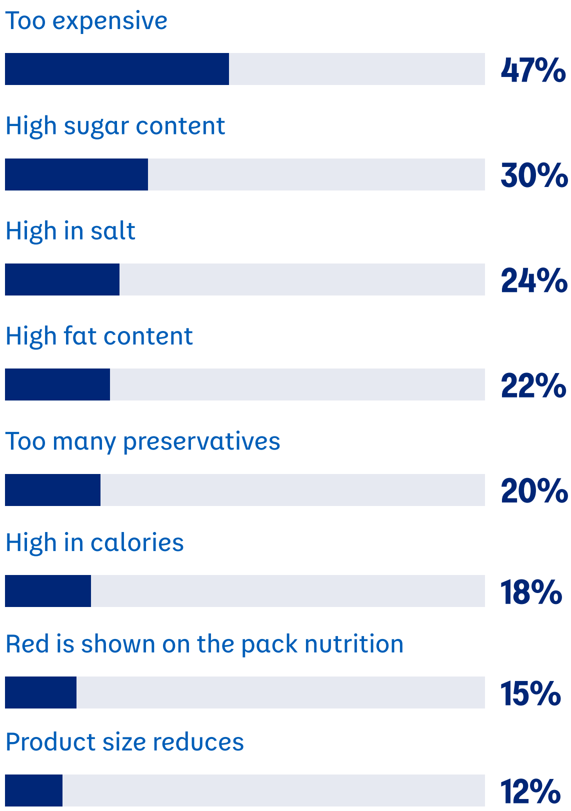
Our research confirms that UK consumers know that too much fat, sugar and salt isn't healthy and are taking steps to reduce the levels they consume. About a quarter (25%) try to eat and drink healthily every day, and another 48% do so multiple times a week.

High levels of sugar, salt and fat in food influence purchasing decisions. After price, high sugar (30%), salt (24%) and fat (22%) content are the three most common reasons consumers avoid purchasing a product.

However, age plays a role. Gen Z (18–24) is less deterred, with only 18% avoiding buying food due to high sugar, 14% due to salt and 15% due to fat – in each case, the lowest across all age groups. By contrast, over-65s are more cautious, with 42%, 38% and 30%, respectively, avoiding foods for the same reasons.

Interestingly, the trend is reversed when it comes to calories: 21% of 18–24s would avoid buying a food because of its high calorie content, compared to just 14% of over-65s.

WHICH, IF ANY, WOULD STOP YOU PURCHASING A CERTAIN FOOD ITEM?



Consumers and experts support reformulation

To reduce their intake of fat, sugar and salt, consumers want help from food and drink manufacturers. Nearly two-thirds (64%) think reformulating product recipes would help them make healthier choices; this ranks just behind clearer nutrition labelling.

Dietitians and nutritionists agree, and support action. As many as 83% think health commitments to drive reformulation would be effective. This is second only to doing more to reduce the cost of healthier products.

Some 91% also support restrictions on the promotion of HFSS products, suggesting strong backing for measures such as the multi-buy and discount restrictions introduced in England in October 2025.

Half (50%) of experts also say consumers struggle with sugar consumption, behind portion control (55%) and fruit and vegetable intake (54%).

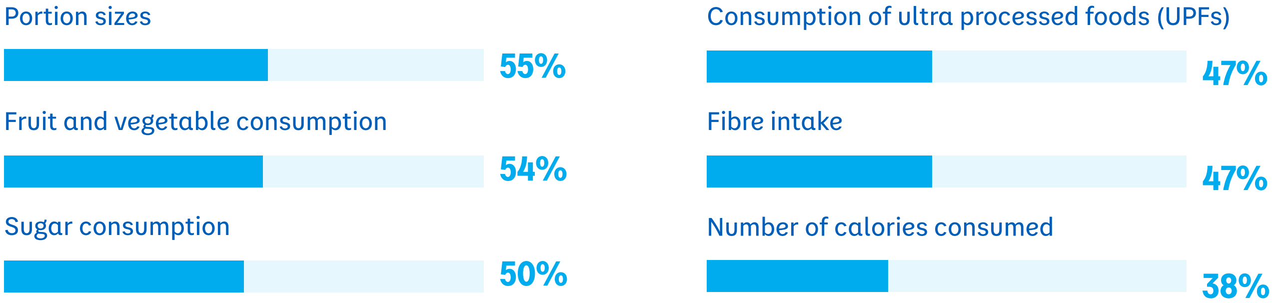
Yet dietitians and nutritionists take a more holistic view on where individuals should focus their efforts. Priorities for healthy eating include fruit and vegetable consumption, hydration, fibre intake and portion control, with fat, sugar and salt further down the list.

Eating healthily isn't just about limiting fat, sugar and salt; it's also about making positive and balanced choices.

83%

of experts think health commitments to drive reformulation would be effective.

WHAT CONSUMERS STRUGGLE WITH THE MOST ACCORDING TO HEALTH PROFESSIONALS



Base: all dietitians / nutritionists (200).

What dietitians and nutritionists want

The single change they'd make

We asked dietitians and nutritionists to tell us, in their own words, the one change they'd make to help people make healthier food choices. We then grouped their answers into three broad themes:

Improve nutritional education and/or understanding

35%

Improve affordability of healthy foods

32%

Promote healthy eating behaviours

21%

The bottom line

Consumers, dietitians and nutritionists want clearer standards, simpler guidance and greater transparency from government and industry.

Measures such as defining what counts as a healthy food and driving reformulation are seen as essential to support informed choices and cut through confusion.

While opinions may differ by age and role, there is a shared view that more needs to be done to help people confidently choose healthier food options.

What information sources do people trust?

Nutrition labels are a trusted go-to

Nutritional labels are the most used and trusted source of health and nutrition information for food and drink. Nearly a quarter of UK adults (23%) rely on them as their primary source—ahead of public sector websites (19%) and GPs (9%).

Almost half (47%) trust labels, ranking above family (43%), and far higher than social media platforms like YouTube, Instagram and TikTok (ranging from 8% to 11%), though still behind independent experts such as GPs, nutritionists and Government websites (all scoring 60% or more).

WHAT ARE CONSUMERS PRIMARY SOURCE OF HEALTH/NUTRITION INFORMATION?

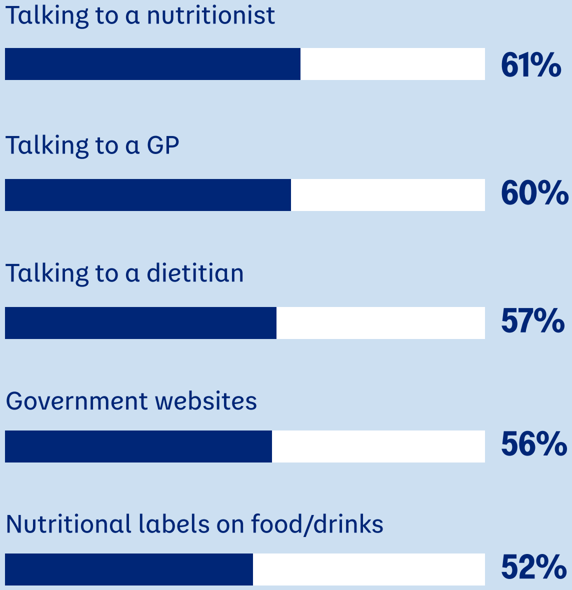
What sources does Gen Z trust?

When it comes to accessing information on health and nutrition, Gen Z is in an unfortunate position: its main source is the least trusted.

For 18-24 year-olds (which lies within Gen Z):

- TikTok is the top primary source (19%), yet only 18% trust it
- YouTube is a primary source for 15%, but trust sits at just 24%

GEN Z'S MOST TRUSTED SOURCES FOR NUTRITIONAL INFORMATION*



* Question: How much do you trust/distrust the following sources of information on health/nutrition?

Action in figures

Our research reveals what actions consumers, dietitians and nutritionists want from government and industry. These are the top results.

Action from government

66% of **consumers** want further action from government to support healthy food choices.

Of those who do, the most supported policies are:

Define what constitutes a healthy food, based on levels of sugar, salt and fat

29%

Mandatory reporting for food and drink manufacturers based on levels of sugar, salt and fat*

27%

* Appears in the NHS 10-year Health Plan for England, published in July 2025 after this research was conducted

Younger people tend to back government action more than older groups:

25-34s

81%

over 65s

55%

89%

of dietitians and nutritionists think the government isn't doing enough.

Asking them to choose from a list of policies, the top three are:

Tighten rules about on-pack health claims

35%

Further restrict promotion of HFSS products, such as multi-buy offers*

34%

Mandatory targets from food and drink manufacturers based on sugar, salt and fat levels

32%

* Introduced in England from October 2025

Action from industry

Nearly half (49%) of **consumers** don't think the food and beverage industry is doing enough to support healthier food choices, compared to 27% who do.

Asking all consumers what would be effective, these measures rank highest:

Do more to reduce the cost of healthier products

76%

Clearer nutrition labelling

65%

Reformulate products for sugar, salt and fat levels

64%

90%

of dietitians and nutritionists think the industry isn't doing enough.

When all dietitians and nutritionists are asked what would be effective, these are the three rated most highly:

Do more to reduce the cost of healthier products

96%

Introduce health commitments that drive reformulation or healthier products

83%

Clearer nutritional labelling on products

82%

What's next?

Our research highlights a clear tension: people want to eat well, but are navigating a confusing landscape of mixed nutrition messages and unclear advice.

SOLVING THIS CONFUSION STARTS WITH CLARITY AND CONSISTENCY, AND SO WE'RE CALLING ON THE GOVERNMENT TO WORK TOGETHER WITH INDUSTRY TO:

- **Create a consistent, evidence-based framework** that clarifies and communicates what makes food healthy – one that's grounded in nutritional value and applied across the entire food system.

- **Encourage innovation and reformulation** by ensuring a stable and consistent regulatory environment in which to improve the nutritional quality of food and drink over time, without shifting the goalposts.

At Danone, we are proud to have committed over 90% of our portfolio to being non-HFSS[2], and we will continue to work with the Government and industry to support healthy eating efforts.

With this agreed definition, industry can reformulate and innovate with purpose, government can guide with confidence, and we can support the nation in making healthier food choices.

METHODOLOGY

Based on the survey "Healthy Eating: The Perspective of Healthcare Professionals" by Cake Consulting in May 2025 with a sample of 200 UK nutritionists and dietitians

And a survey conducted by OnePoll in March-April 2025 with a sample of 5,000 UK adults. Nationally representative on the basis of age, gender and region

[2] Defined by the UK Government's current policy and legislation relating to HFSS based on the 2004/5 NPM Model

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