What's happening in the world of plant-based, healthy food?

Insights Digest

July 2026

Contents

Introduction

This report outlines several key consumer and market dynamics shaping HAK's category. It also translates these into clear, evidence-based recommendations for:

Strategy Innovation Communication.

We structure our analysis around two forces.

- **Pull Factors**: consumer trends and behaviours, from the shift towards health and flexitarianism to the demand for convenience, that create opportunities for HAK to capture.
- **Push Factors**: industry-wide shifts, including regulatory pressure, food waste targets and the sustainability paradox, that require deliberate action to get consumers on board.

Together, these factors point to where HAK is well positioned to win, and where the industry as a whole still needs to close the gap between intention and actual consumer purchases.

This report also introduces **Future of Food Institute** as a consumer insights partner. As a specialist agency dedicated to sustainable and healthy food choices, we combine proprietary tools such as our Food Profiles segmentation with a curated knowledge base of trends and innovations across the food and sustainability sector.

Our aim is straightforward: *to help HAK develop the right products, for the right consumers, with the right message.*

Pull Factors

Consumer trends and behaviour offering opportunities for HAK

Overview of consumer trends and behaviour offering opportunities for HAK

- **Health has become the dominant force shaping food consumption among Europeans.** 51% of Europeans cite eating healthier as their top dietary priority and far exceeding any other factor shaping their food choices, including sustainability and convenience.
- **Consumer concern about ultra-processed food is reshaping packaged food.** Consumers are increasingly scrutinising ingredient lists, rejecting complex formulations, and gravitating toward foods perceived as natural and minimally processed.
- **The structural move away from meat-heavy diets is now well-established.** European consumers are embracing flexitarianism and a more mindful approach to meat consumption, rather than fully eliminating it.
- **Consumer expectation for convenience is accelerating, especially among young people.** Ready-to-eat food for immediate consumption is growing at approximately 7% in European grocery retail, with 82% of Gen Z eating ready-to-heat meals at least once a month.
- **The cost-of-living crisis has fundamentally reset consumer value expectations.** More than 80% of consumers now perceive private-label quality as equal to or better than branded products.

Health has become the dominant force shaping food consumption among Europeans.

51% of Europeans cite eating healthier as their top dietary priority and far exceeding any other factor shaping their food choices, including sustainability and convenience.

This intent translates into a desire for more fruit and vegetables: just over 50% of Europeans express a wish to increase their intake. For HAK, whose portfolio is built around vegetables, this is a cultural tailwind. The challenge is converting stated intent into habitual purchase. Key barriers to adopting healthier choices including cooking confidence, availability, and habit. Young consumers experience these barriers most.

Read more in chapter one of our 2026 Trust Report published by EIT Food's Consumer Observatory.

Consumer concern about ultra-processed food is reshaping packaged food

Consumers are increasingly scrutinising ingredient lists, rejecting complex formulations, and gravitating toward foods perceived as natural and minimally processed.

Claims around absence of preservatives, artificial ingredients, and added sugars are rising in salience. For HAK, this is a nuanced opportunity. Its core products (canned, jarred, and pouched vegetables and pulses) are by nature minimally processed, and its "soil to mouth" positioning directly anticipates the clean-label demand.

However, HAK must actively manage how its processing methods are perceived. The distinction between ultra-processed junk food and prepared or preserved food is poorly understood by consumers.
The industry challenge is investing in consumer education around the meaningful difference between *processing for preservation* (canning, jarring) and *ultra-processing for formulation.* HAK's brand heritage and B Corp credentials give it credibility to lead this.

Educate consumers about the difference between *processing for preservation* (freezing, canning) and *ultra-processing for formulation.*

The structural move away from meat-heavy diets is now well-established.

European consumers are embracing flexitarianism and a more mindful approach to meat consumption, rather than fully eliminating it.

51% of European meat consumers report having reduced their yearly meat intake, up from 46% in 2021, with Germany (59%), France (57%), and Italy (59%) leading. Critically, around 90% of plant-based food consumers are neither vegan nor vegetarian: the commercial opportunity lies with this large, pragmatic middle ground.

These consumers are not looking to replace meat with innovative or ultra-processed alternatives. Consumers are seeking natural sources of protein and fibre including vegetables and legumes. This positions HAK not as a disruptor competing with meat, but as the intuitive, culturally neutral beneficiary of a broad dietary evolution.

Prioritise the flexitarian "pragmatic middle" as the core growth segment. The flexitarian is already Hak's customer. Deepen that relationship across more occasions.

Meat's role in European culture is shifting, but unevenly. Northern and Western European consumers are moving toward "mindful meat"; quality over quantity, with greater attention to ethics and origin. In Southern and Eastern Europe, change is expected to lag by a generation.

For HAK, which operates primarily in Northwest Europe, this is a favourable development. Its core markets are precisely those where cultural appetite for vegetable-forward eating is strongest. The social dimension still carries weight here though: a third of flexitarians cite family or partner resistance as a barrier. Products that fit naturally into shared, family-occasion meals are most likely to sustain habitual purchase than products that signal dietary departure

Design formats suited to shared, family-oriented meal occasions, reducing the social friction that flexitarians report as a barrier.

Consumer expectation for convenience is accelerating, especially among young people.

Ready-to-eat food for immediate consumption is growing at approximately 7% in European grocery retail, with 82% of Gen Z eating ready-to-heat meals at least once a month.

Younger consumers are more likely to prioritise food that is quick and easy to prepare compared to older cohorts, and the trend is reinforced by rising single-person households, longer commutes, and decision fatigue. HAK's extension into stand-up pouches and fresh-prepared formats directly addresses this demand. For HAK, expanding the reach and visibility of its convenience formats and ensuring they are positioned as healthy, quick, and accessible rather than premium or niche, is one of the most immediate commercial opportunities.

Grow the ready-to-eat range to meet rising convenience demand, while keeping a clear healthy and "natural" positioning against ultra-processed alternatives.

Foodservice is growing faster than grocery retail; expanding at 6.8% between 2022 and 2025 compared to 4.8% for grocery over the same period. This divergence reflects a long-term shift away from home cooking in Europe, particularly among younger consumers. For a company whose heritage is built on retail-channel packaged vegetables, this channel evolution poses a strategic question: how does HAK capture vegetable and pulse consumption occasions that are migrating out of the home?

Expand into foodservice and other out-of-home channels to capture vegetable consumption occasions that are migrating away from retail.

The cost-of-living crisis has fundamentally reset consumer value expectations.

More than 80% of consumers now perceive private-label quality as equal to or better than branded products.

Nearly 85% of European consumers report trading down in their grocery shopping. Private label sales in Europe reached a record €354.5 billion in 2024, accounting for 39% of total grocery market value.

This pressure is acute in HAK's categories, where canned and jarred vegetables are a traditional private-label stronghold. HAK's branded positioning needs to be supported by clear, consistent differentiation. The company should emphasise their clean-label “soil to mouth” narrative, sustainability credentials (eg. B Corp), and premium quality that comes with Dutch vegetable processing; all at price points that remains accessible.

Defend the branded portfolio against private label by competing on taste, origin and nutritional credentials rather than price.

Push Factors

Industry shifts that require action to bring consumers on board

Overview of industry shifts that require action to bring consumers on board

- **Sustainability drives brand legitimacy, not purchasing behaviour.** Sustainability is the top dietary priority for only 9% of Europeans, ranking third behind health and affordability.
- **Reducing food and packaging waste is an industry imperative.** EU targets dictate food waste must be reduced, but action against food waste often requires consumers to change their purchasing, storage, and consumption habits.
- **Regulatory pressure is driving traceability and evidence-based claims on packaging.** There is growing policy momentum around front-of-pack labelling, sustainability claims, and the naming conventions for plant-based products.

Sustainability drives brand legitimacy, not purchasing behaviour.

Sustainability is the top dietary priority for only 9% of Europeans, ranking third behind health and affordability.

Over half of consumers say sustainability has *some* influence on their eating habits, but price is the primary barrier to sustainable choices in virtually every country surveyed. For HAK, has credible sustainability credential. Its B Corp certification, and Green Kitchen sustainability principles give it a level of third-party validated credibility that most competitors cannot claim. Consumers want sustainability claims to be independently verified so HAK is positioned to benefit from this.

Sustainable product claims have outperformed non-sustainable counterparts commercially only when anchored alongside taste, quality, and value.The practical implication for HAK is that sustainability credentials build brand legitimacy among engaged consumers, but do not direct purchasing. HAK's business and values fit, the challenge is ensuring sustainability does not crowd out more immediate consumer motivations.

Anchor sustainability claims alongside taste, quality and value, rather than leading with sustainability alone.

Reducing food and packaging waste is an industry imperative.

EU targets dictate food waste must be reduced, but action against food waste often requires consumers to change their purchasing, storage, and consumption habits.

Packaging innovation is being driven by regulation, costs, and sustainability commitments. Plastic-free packaging has the highest consumer adoption potential of any food innovation tested. 78% in an 18-country study and 52% of global consumers actively report reducing plastic use.

HAK already uses a diverse packaging mix, cans, jars, stand-up pouches, which gives it flexibility relative to single-format competitors. The stand-up pouch format, in particular, is lighter and generates less packaging waste than glass jars. This story can be told credibly.

The industry is also innovating smart stickers, date-labelling reform, upcycled ingredients, and extended shelf-life packaging to address foodwaste. Consumer awareness of their own role in food waste is growing, but translating that into consistent behaviour change remains difficult. Consumers see food waste at home as their responsibility, but not food wasted in the supply chain.

The key communication challenge is making the food waste reduction argument explicit: HAK's preserved formats extend shelf life significantly compared to fresh vegetables, reducing household food waste — an environmental benefit that is currently under-communicated by the category as a whole.

Frame shelf-stable products as"waste-smart", and pouch packaging as creating less plastic waste to show that HAK takes responsibility for waste in their supply chain.

Regulatory pressure is driving traceability and evidence-based claims on packaging.

There is growing policy momentum around front-of-pack labelling, sustainability claims, and the naming conventions for plant-based products.

The industry faces a challenge in ensuring that sustainability and health claims are substantiated, credible, and consistent. Public backlash against greenwashing has already caused some manufacturers to reduce the presence of sustainability claims on shelf.

HAK is better positioned than most to navigate this. B Corp certification provides a credible, independently audited sustainability claim. This is exactly what consumers and regulators are increasingly demanding. The risk is one of execution: ensuring that labelling, on-pack communication, and broader brand messaging are consistent and specific. They should also resonate with consumers whose top priority is not sustainability.

Translate HAK's promising credentials it into claims that resonate with mainstream shoppers, not just sustainability-engaged consumers.

About Future of Food Institute

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Our Mission:

Help sustainable food companies innovate faster and communicate with more impact, by offering crystal-clear consumer insights.

Using our insights, our clients can develop the **right products**, for the **right consumers**, with the **right message**.

What makes us different?

- We are the specialised consumer insights agency in **sustainable & healthy food** choices.
- We know what's happening in the food chain. Whenever we can, we draw from **existing knowledge**, trends and media.
- We are a network organization. We build the **best team for each project** by connecting experts, universities, consultants and researchers.
- Our effective and efficient way of working gives you **more insight for your budget**.

Since 2018, we've been working with mission-driven food brands and non-profits that have **a positive impact on society and our planet**. Together we empower consumers to make food choices that are good for them as well as the planet.

We offer all proven market research methodologies. On top of that we have a number of specialities:

- Our proprietary consumer segmentation: **Food Profiles**. We have identified 6 distinct **types of consumers**, each with a different mindset when it comes to food choices.
- Our curated **insights, trends and innovations database** containing hundreds of inspirational developments in marketing & advertising, tech, policy, and consumer **insights** in the food and sustainability sector.

Our areas of expertise

Strategy & Positioning

Innovation

Branding & Communication

Our capabilities

Quant & Qual Insights

Trends, Media & Knowledge

Field studies

Network Organisation

Some of our clients and partners

How can we help?

Quantitative Research
Reliable numbers help turn complex decisions into clear direction. We combine category expertise with efficient, high-quality research execution—giving you quantitative insights you can trust to move your business forward.

Qualitative Research
Qualitative insights reveals the **motivations**, **emotions**, and **cultural beliefs** that shape consumer behavior. With extensive experience in sustainable food choices and a strong team of experts, we uncover the deep human insights that spark innovation and sharpen strategic direction.

Food Profiles
Food Profiles is a research-backed **segmentation** model that identifies six distinct consumer types based on their food values, motivations, and behaviors—providing far more precision than traditional demographic segmentation. Developed by Future of Food Institute and Food Cabinet, it helps brands tailor their products, messaging, and innovation strategies to what truly drives each consumer group.

Usage & Attitude
Usage & Attitude research gives you a deep understanding of how consumers **use** your products (and your competitors')—and how they **think** and **feel** about them. By combining real-world usage behavior with emerging category developments and global consumer trends, we help you future-proof your portfolio and fill your innovation pipeline with products consumers truly want.

Concept Testing
Concept testing helps you de-risk innovation by **validating ideas** early with real consumers, ensuring your next product or proposition is grounded in evidence rather than assumptions. We deliver fast, reliable, cost-effective, and actionable concept evaluations—refining ideas, uncovering new opportunities, and strengthening propositions before full-scale development.

Communication Research
Communication research ensures your **messaging** truly **resonates** by grounding it in the language, tone, and motivations of your target audience. By involving real consumers early, we help you develop clear, relatable, and high-impact communication that makes every advertising euro work harder.

Policy Research
Policy research helps ensure that interventions, regulations, and campaigns are grounded in a solid understanding of real consumer behaviour and the motivations and barriers that shape this behavior. By combining **behavioral insights** with our deep expertise in sustainable food choices, we help policymakers design effective, evidence-based solutions that truly drive positive change.

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