January 2025

Ultra-Processed Foods

in the food and drink industry

Highlights

Nearly all (90%) of UK consumers have heard of the term "ultra-processed foods"
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Over two-thirds (67%) of consumers are very concerned about affording their groceries, more than double three months previously (31%).
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More than two-thirds (68%) of UK consumers pay attention to the level of processing in "healthy" foods, with one in five (21%) focusing on it a lot.
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Three in five (60%) people want to see information about processing methods on food packaging.
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One in three (32%) consumers are trying to kick their UPF snacking habits.
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Over four in five (82%) UK consumers purchased convenience food at least once in the week leading up to the survey.
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Dive into our Ultra-processed foods section to discover key insights and cross-sector takeaways.

Methodology

Vypr is a **leading product intelligence platform** designed to empower brands with the insights needed to make informed product decisions at the right moments. Our platform leverages a **proprietary community of over 80,000 UK consumers**, providing our cutomers with direct access to real-time feedback. This unique capability allows brands to refine their strategies and develop products that truly resonate with their target audiences.

At Vypr, we go beyond traditional market research by focusing on the immediate, intuitive reactions of consumers. Instead of lengthy questionnaires, we engage our community with short, targeted questions that capture fast, instinctive responses. This approach is rooted in the principles of **System 1** thinking, a concept popularised by Daniel Kahneman in his seminal work, Thinking, Fast and Slow. System 1 represents the brain's quick, automatic decision-making process, which is responsible for approximately 95% of purchasing decisions. By tapping into this cognitive function, Vypr enables brands to understand consumer behaviours and attitudes with **accuracy and speed**.

Research Methodology

The findings in this report are based upon first-party research, conducted between October 2024 and December 2024. The primary research apparatus used to collate consumer feedback was a bespoke survey application, available on smartphone. The application is device agnostic and allowed a nationally representative community of real UK consumers to provide answers to a broad range of questions. To deliver comprehensive insights, Vypr adopts a mixed-method approach, by integrating both **qualitative and quantitative** research methodologies.

Qualitative Research

For our qualitative research, we utilised two distinct types of questions:

Free Text Responses: Engaging a sample size of 50 consumers, this approach allowed respondents to provide open-ended answers. These responses offer deep, personal insights into consumer thoughts and attitudes, capturing the nuances of their experiences.

Sentiment Analysis: Leveraging AI technology, we analysed responses from 250 consumers to summarise the overall sentiment, whether positive or negative, related to specific topics. This method provides a clear understanding of the emotional tone behind consumer feedback, highlighting the underlying sentiments that drive behaviour.

Quantitative Research

Our quantitative research was designed to capture structured, statistically significant data:

Sample Size and Question Types: We conducted surveys with a robust sample of 1,000 consumers. This larger sample size ensures the data is representative of the broader population, allowing us to draw meaningful conclusions across different demographics.

Single and Multi-Answer Multiple Choice Questions: These questions offered respondents a range of predefined options, enabling us to measure consumer preferences and behaviours with precision.

Vykert Scale: Our proprietary Vykert question, a refined version of the traditional Likert scale, uses a sliding scale to capture the intensity of consumer opinions. This provides a more nuanced view of their preferences and attitudes.

Representation: All quantitative research was conducted using a nationally representative sample of 1,000 consumers. This means that proportionate weightings, aligned to the most recent ONS population data (2024), were used to ensure proportional representation associated to age and gender

In Brief

The UK's relationship with ultra-processed foods (UPFs) is complex and often misunderstood. UPFs are typically classified based on the degree of processing, the number of ingredients, and the presence of specific additives, though there is no universally agreed definition of "ultra-processed."

This approach differs from the High Fat, Salt, and Sugar (HFSS) regulations followed by the food industry, which focus on a product's nutritional profile. The lack of alignment between these frameworks can lead to confusion for consumers, highlighting the need for clearer communication and education.

Many value the affordability and convenience of these products, but they have rising concerns about their health implications and environmental impact. These conflicting sentiments ripple across grocery stores, restaurants, and takeaways, shaping consumer decisions in profound ways. Understanding these dynamics sheds light on the complex interplay between convenience, cost, and conscience in modern food choices.

Rising Awareness, Persistent Consumption: Factory-made foods containing preservatives, additives, and unrecognisable ingredients have long dominated supermarket shelves. However, the spotlight on ultra-processed foods is growing, driven by television programmes and social media content. This **increased awareness has highlighted the potential health risks of these products**. Despite this, the allure of affordability and convenience remains strong, with four in five consumers (82%) continuing to purchase UPFs.

Economic and Environmental Pressures: The UK's cost-of-living crisis is amplifying consumer anxieties. **Nearly 67% of consumers are very concerned about affording their grocery shopping**, a significant rise from earlier in the year. At the same time, sustainability pressures are mounting, with 45% of consumers expressing strong concerns about making environmentally friendly choices - a sentiment that has more than doubled in recent months.

A Complex Relationship Unveiled: Consumers face a complicated relationship with UPFs, influenced by a mix of awareness, affordability, and sustainability concerns. Understanding these competing motivations and concerns helps brands better support shoppers in making choices that align with their values and circumstances.

The relationship between consumers and UPFs highlights the need for balance. **Brands can help by offering clear nutritional information**, transparent sustainability labels, and innovative alternatives that prioritise both health and convenience. By addressing these needs, brands can build trust and support more informed consumer choices.

Awareness of UPFs increases

Awareness of UPFs seems to be growing, with nine in ten of consumers recognising the term. Generally, over 35s get information from television channels, while under-35s prefer search engines and social media platforms. However, the term is not as deeply entrenched in the public consciousness as "price match", "traffic light labelling" or "UHT".

Most well-known food terms

1. Price match
2. Traffic light labelling
3. UHT
4. UPF
5. HFSS
6. Nova

Growing Awareness of UPFs among UK Consumers: Nearly all (90%) of UK consumers have heard of the term "ultra-processed foods"

Moreover, just under a third (31%) of consumers now recognise the acronym "UPF," a sharp increase from 17% in the summer, reflecting growing familiarity with industry terminology.

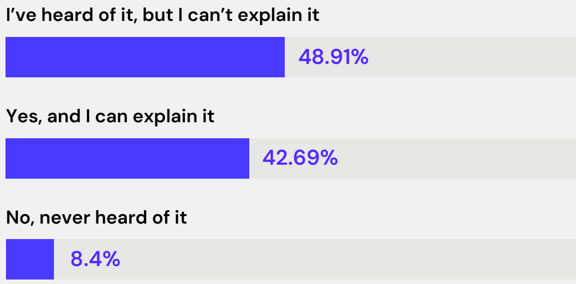
Generational Divide in Information Sources: Younger consumers (under 35 years) generally learn about UPFs from digital sources, with 29% using search engines like Google and 27% turning to social media platforms.

In contrast, older consumers (over 35 years) tend to gain awareness through traditional media. Television programmes, including shows and documentaries by Michael Mosley, serve as the primary source of information for 36% of this demographic. Additionally, around one in five (21%) rely on magazines and newspapers for information about UPFs.

UPF Awareness and Other Food Terms: Compared to other food terms food-related terms and abbreviations, awareness of UPF lands in the lower-middle range.

The most well-known and understood of all the terms presented was “price match", with around (69%) seven in ten grasping the phrase.

Do you know what ultra-processed food is?



Sent to a nationally representative sample

Limited understanding of UPFs

While awareness of the term UPF is rising, grocery consumers do not fully understand it. Our data found that less than half (43%) of people felt confident enough to offer an explanation. Many explanations used words like "additives" and "preservatives", showing that consumers are vaguely on the right track but still missing a lot of education. By contrast, people are much more comfortable explaining terms like "price match" or "five-a-day".

- More than two-thirds of consumers feel they could explain the terms "price match" (69%), and "five-a-day" (66%).
- Around one in two feel that can could explain UHT (54%) and UPFs (50%)
- When we put them to the test, less than half (43%) of the respondents had a go at explaining what UPFs are.

Most consumers could not provide a satisfying definition of UPFs, although at least 30% knew what the acronym stood for.

The most common descriptors are, "additives," "preservatives," "artificial ingredients," and "processed."

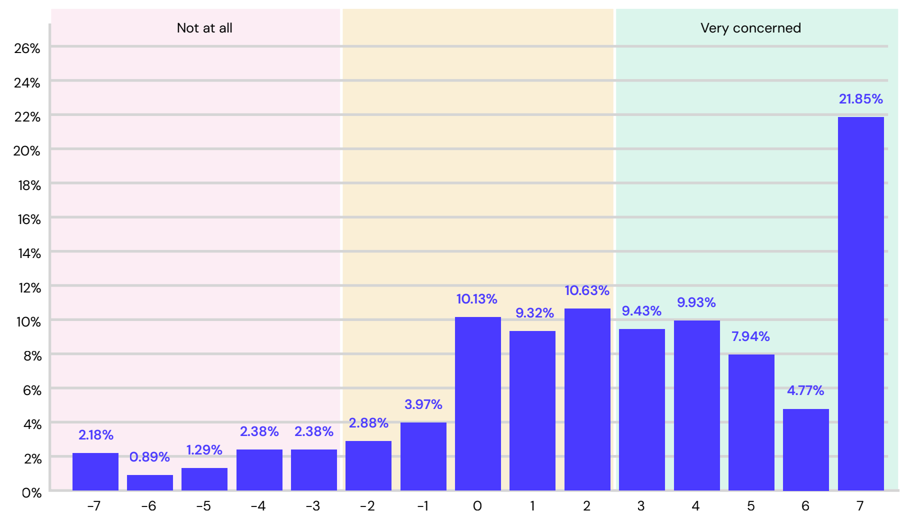
When asked what does ultra-processed mean?

It means products that have been made with over five ingredients

Female, 35-44

- Over half of consumers (54%) feel concerned about the health implications of UPFs. Just over a third (37%) are neutral, and around one in ten (9%) are unconcerned.
- Even though consumers appreciate UPFs as convenient and affordable, one in two think (51%) they are unhealthy and over a third (37%) consider them to have low nutritional value.

How concerned are you about the health efects of consuming Ultra Processed Foods?



Five-a-day vs UPFs and HFSS

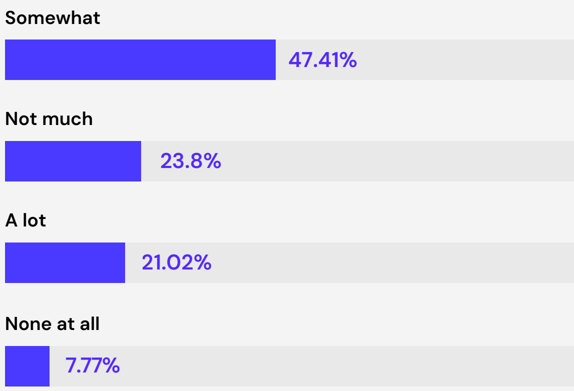
As one of the more popular terms, we compared "five-a-day" against UPF and HFSS (high in fat, salt and sugar) to see which one was ringing the loudest in consumer consciousness. Overall, most people are either thinking about hitting their five-a-day or they are focused on other things. About one in five people consider UPFs as they steer their trolleys through the aisles, more than double the number of people thinking about HFSS.

More than two thirds (68%) of UK consumers pay attention to the level of processing in "healthy" foods, with one in five (21%) focusing on it a lot.

We asked grocery shoppers whether they were thinking about UPFs, HFSS or five-a-day as they navigate the supermarkets:

- Most people (35%) are focused on hitting their five-a-day fruit and vegetable goals.
- "None of the above" was the next most popular answer (32%), as many shoppers are probably more focused on other factors like price or convenience over health labels.
- UPFs came in second, with more than one in five (23%) people considering food quality.
- HFSS is the least considered factor, with just one in ten (11%) of consumers prioritising their household's fat, salt, and sugar intake despite its significant impact on food industry practices and ingredient use.

When it comes to 'healthy' foods, how much attention do you pay to the level of processing?



Sent to a nationally representative sample

Rising concerns

Consumers are increasingly troubled by what they're eating. Mostly, they're worried about how much it costs and whether they can afford it. But increasingly, people are anxious about the impact of UPFs on their health, as well as poor levels of sustainability – especially in restaurants.

Ultra-processed foods and the grocery sector

Over two-thirds (67%) of UK consumers report being very worried about affording their groceries, marking a significant increase from just three months ago when this figure stood at 31%. This doubling of concern highlights the growing financial strain faced by shoppers.

In addition, more than three-quarters (77%) of the population express concern over the impact of ultra-processed foods (UPFs) on their health and wellbeing. This indicates a rising awareness and anxiety surrounding food quality and nutritional standards.

Sustainability is another pressing issue for consumers. Anxiety about the low levels of sustainability in supermarkets has surged by 13% over three months, rising from 32% in August to 45% in October. This jump underscores the increasing importance of environmental factors in consumer decision-making.

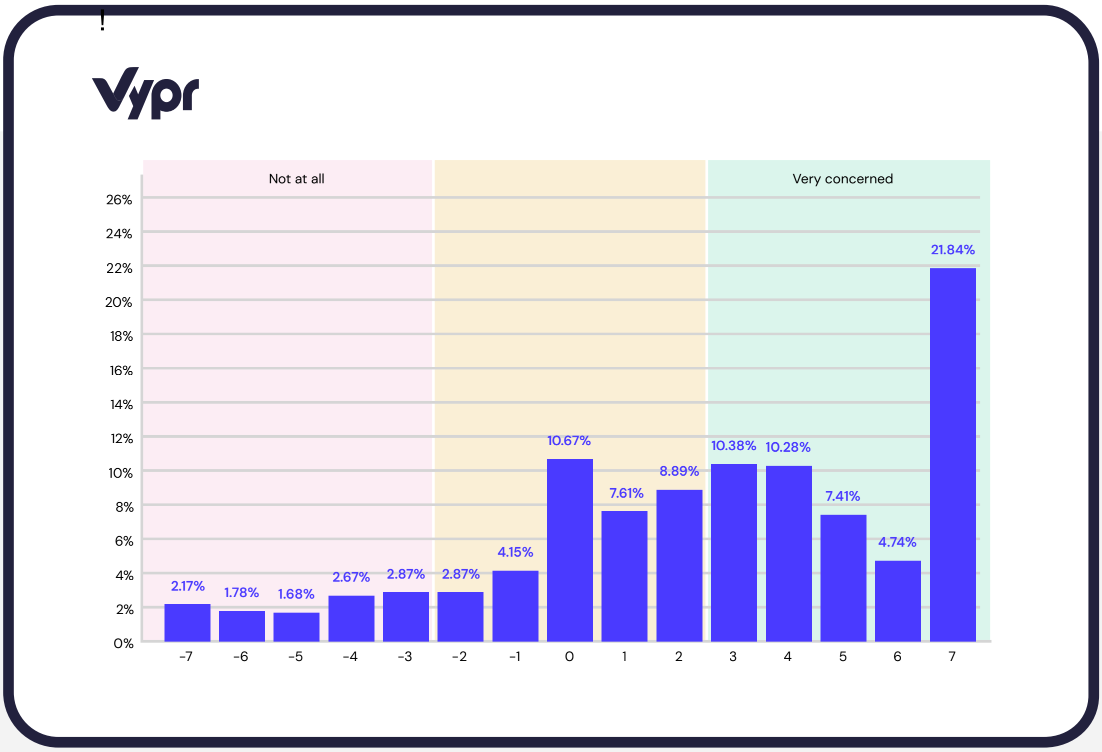
Top Stressors for UK Grocery Shoppers

The primary concerns for UK grocery shoppers are as follows:

1. **Increased Prices:** Nearly half (50%) of consumers cite rising costs as their biggest worry.
2. **Product Quality:** Over one in five (23%) shoppers are anxious about maintaining high-quality standards in the products they buy.
3. **UPFs:** Approximately 12% of consumers identify UPFs as a significant source of stress.

Older shoppers, particularly those over the age of 55, are especially affected by escalating prices. More than half (54%) in this demographic list rising costs as their primary concern, reflecting heightened vulnerability among older consumers in the current economic climate.

How concerned are you about Ultra Processed Foods when shopping for groceries right now?

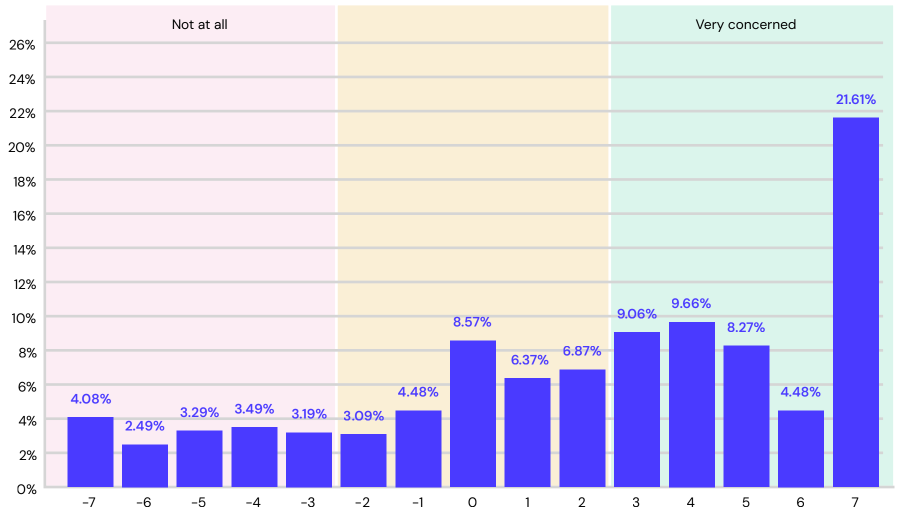


UPFs and the takeaway sector

The affordability of takeaways has become a pressing issue for UK consumers, with the proportion of people worried about costs more than doubling in just three months. Concerns rose from 27% in August to 62% in October, highlighting the growing financial pressure on households.

Additionally, over half (54%) of consumers worry about the high levels of UPFs often found in takeaway meals. This shows that people are becoming more conscious of what they're eating and its impact on their health.

How concerned are you about Ultra Processed Foods when ordering a takeaway?



Top Stressors for UK Takeaway Consumers

When it comes to ordering takeaway food, the leading concerns for UK consumers are:

1. **Affordability:** The biggest worry, with 62% of consumers feeling "very concerned" about costs.

2. **UPFs:** A significant concern for 54% of consumers who worry about their health impact.

3. **Sustainability:** 44% of consumers rank sustainability as a key stressor, reflecting increasing demand for environmentally friendly options.

Addressing UPF concerns should be a top priority for the industry. Clearer ingredient transparency and healthier menu options could help reassure consumers and rebuild trust. These steps could make a real difference in aligning with shifting consumer expectations.

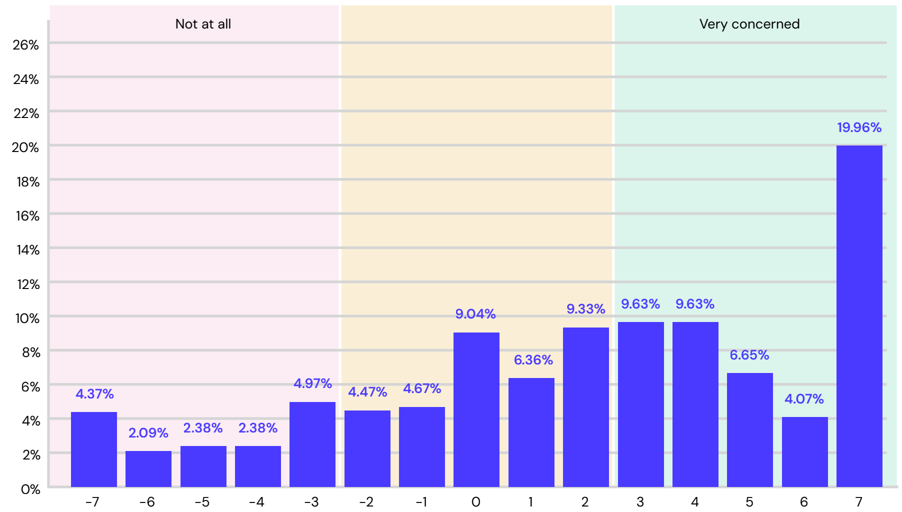
UPFs and the dine-out sector

The cost of dining out is a growing concern for UK consumers, with two-thirds (67%) worried about whether they can afford their meal. This highlights the financial pressures many face when choosing to eat out.

Half (50%) of consumers also express concern about the presence of UPFs in restaurant dishes, reflecting heightened awareness of nutritional quality. Additionally, just under half (44%) feel uneasy about the sustainability practices of restaurants, showing the increasing importance of environmentally responsible dining.

Restaurants have an opportunity to ease these concerns by prioritising transparency about ingredients and reducing reliance on UPFs. Simple steps, like sourcing sustainable ingredients and offering healthier menu choices, could go a long way in meeting consumer expectations and fostering loyalty.

How concerned are you about Ultra Processed Foods when ordering at a restaurant?



Efforts to reduce UPFs

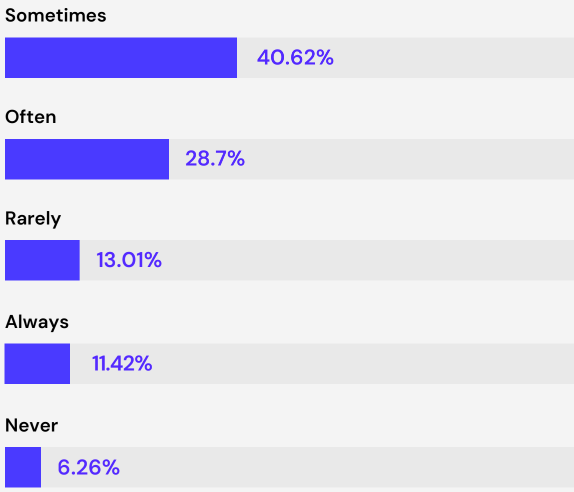
While most consumers are mindful of ultra-processed foods, less than a sixth (13%) completely avoid them consistently. Our research found that despite their best intentions, more than four in five bought UPFs in the week leading up to the survey. Some grocery shoppers are making efforts to plug the gap between their intentions and behaviour though. More than a third (35%) have already reduced their UPF intake over the past six months, and there are some resolutions in place to kick unhealthy habits.

General Intentions Around UPFs

Avoidance Behaviours

- Half consumers think it's very important to avoid UPFs in their diets.
- Over two-thirds (69%) actively try to steer clear of UPFs, with 41% avoiding them sometimes and 29% avoiding them often.
- A smaller group, less than a sixth (13%), never avoid UPFs.

How often do you consciously avoid purchasing ultra-processed foods?



Sent to a nationally representative sample

Changing Habits

- One in three (32%) consumers are specifically working to kick their UPF snacking habits.
- Just over one in five (22%) want to eat fewer UPFs and reduce alcohol consumption.
- Conversely, a minority (16%) are content with their current eating habits and don’t wish to make any changes.

Home-Cooking Preferences

- Cooking from scratch remains a common practice in the UK, with three in five (61%) preparing meals at home at least every other day. Over four in five (87%) do so at least weekly.

Preferences for Processing Levels

- More than two-thirds (65%) of consumers prefer minimally processed high-protein foods, such as Greek yogurt or canned tuna, over heavily processed alternatives.
- The label "heavily processed" can deter many consumers, making them more likely to put a product back on the shelf, even for high-protein options.

Intention-Behaviour Gaps Around UPFs

Contradictions in UPF Consumption

- Just over a third (35%) of consumers have reduced their UPF intake over the past six months, with 12% of this group making significant changes.
- Despite recognising health risks, nearly four in five purchased UPFs at least once in the past month, with more than a third doing so several times.
- Convenience foods remain popular, with over 82% purchasing them in the week prior to the survey and 56% of these buyers doing so more than once.

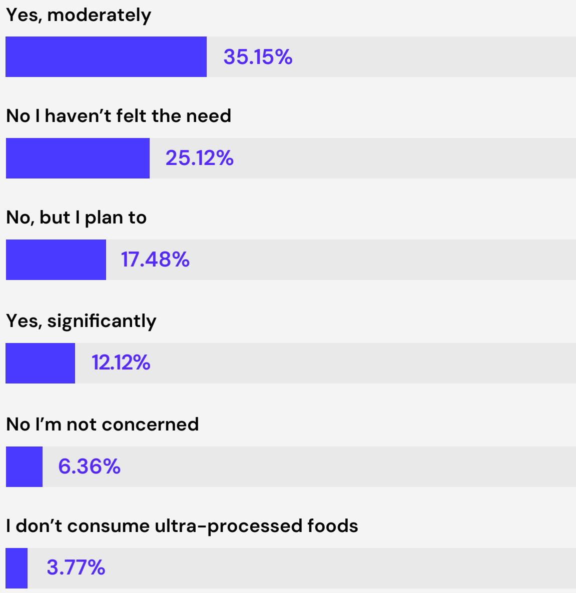
Mixed Priorities Among Consumers

- Among those who don't exercise regularly, three in five (60%) prioritise health over convenience, though only 20% do this consistently.
- And many consumers are unaware that high-protein products like protein bars and shakes are classified as UPFs.

Attitudes Towards Healthier Options

- When asked if they'd pay more for a healthier version of a UPF, 41% said it depended on the situation. Only 29% would prioritise health, while fewer than 20% would choose cost savings.
- A third (33%) of consumers balance eating UPFs with a healthier meal to feel better about their choices, while 16% feel guilty but purchase UPFs anyway.

In the past six months, have you made any changes to your diet specifically to reduce ultra-processed food consumption?



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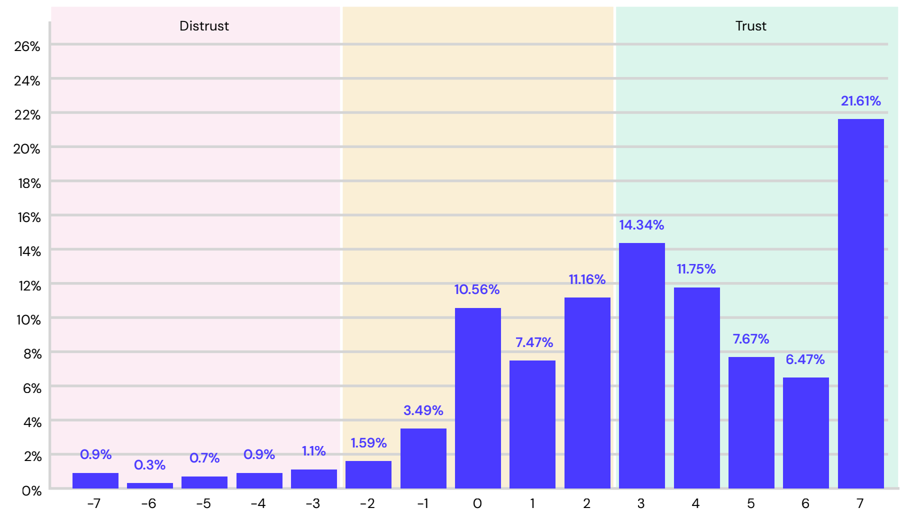
Helpful Tools for Consumers

- **Three in five (60%) people want to see information about processing methods** displayed on food packaging, **suggesting a strong demand for transparency**.
- The majority (62%) of grocery shoppers trust the labels and classifications provided on food packaging, showing that **clear labelling can influence purchasing decisions.**
- The **traffic light labelling system is the most popular food classification,** preferred by three-quarters (75%) of consumers for its simplicity and clarity.

How much do you trust food labels and classifications, e.g. traffic light labelling



UPF and what consumers want

Earlier in 2024, we also uncovered the rise of products fortified with additional nutrients or beneficial compounds, particularly among men. Today, nearly two in five (38%) of 35–44-year-olds across genders add them to their weekly baskets. Another key group are vegans and vegetarians, with around a third (30%) buying functional foods often, possibly to supplement what may be missing in their diets elsewhere.

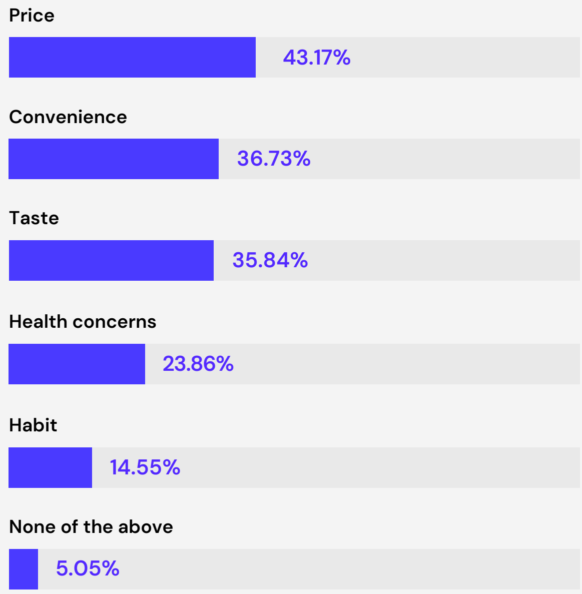
UPF Motivations: The top three motivations for grocery shoppers to put UPFs in their baskets are price, convenience and taste, collecting 43%, 37% and 36% of consumer preference collectively.

Popular UPFs and Priorities: The UK's favourite UPFs are packaged bread, breakfast cereals, confectionery, and frozen foods. Convenience and nutritional value are equally important to nearly half (46%) of UK consumers when choosing products. However, for over a third (35%), nutritional value takes priority.

Preferences for Improvements: Many consumers have stated that clearer labelling on UPFs would likely influence their purchase decisions. Some noted that better labelling would make them "think twice" or "reevaluate" their choices.

Two-thirds (66%) of UK consumers would be willing to pay more for healthier alternatives to UPFs. This willingness rises to nearly nine in ten (88%) among sporty individuals who exercise daily.

What factors most influence your decision to purchase ultra-processed foods (select all that apply)?



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Cross-sector takeaways

1. **Offer healthy alternatives:**

   Considerable groups – especially younger and sporty people – want healthy alternatives to UPFs so much that they are even willing to pay more for them. Catering for this need is a low-hanging fruit for brands.

2. **Help consumers distinguish between “unhealthy” and “UPFs”:**

   Better education around UPFs is needed to help consumers make informed decisions, as many consumers today seem to be using the term as a catch-all synonym for “unhealthy". This may not always be accurate as some processed foods like protein shakes could be better suited for someone's diet, than for example, a homemade sherry trifle.

3. **Use sustainable packaging:**

   Despite intentions to improve their health and care for the planet, the majority of consumers are still tempted by the price and convenience of UPFs. To help them manage cognitive dissonance, sustainable packaging could help alleviate some of their ongoing climate anxiety.

3. **Continue to improve traffic light systems:**

   Consumers appreciate the food labelling traffic light system, voting it as their favourite way to find out information about their food. But there is also room for improvement. Consumers want more transparency about the nutritional content, processing levels and sustainability factors. Adding these features without complicating it could be an investment worth making.

5. **Convenience without ultra processing:**

   Consumers’ need for quick and easy food could be pushing them to make decisions that they feel conflicted over. For retailers looking to soothe this cognitive dissonance, they could introduce un-processed alternatives, for example fresh ready-to-cook meals or quick and easy recipe cards. Affordability and sustainability play a significant role too and so brands that calm those pain points could benefit the most.

In Summary

As UK shoppers manoeuvre around supermarkets, they're battling through a labyrinth of concerns and preoccupations. Nearly half (45%) are worried about how their purchases will affect the planet - a 13% increase since the summer. And alarmingly, over two-thirds (67%) are worried about whether they can even afford their groceries.

On top of this, consumers are aware of how unhealthy UPFs can be, reflecting on learnings from TV programmes or social media content. When they realise that a product is "heavily processed", they will usually put it back as they deem it to be unhealthy. But often, they don't realise that foods like bread, ice cream or plant-based alternatives fall into the same category.

For brands and retailers, there is a unique opportunity to help consumers overcome their knowledge gaps and find products that give them pleasure without the guilt. There could be gaps in the market for unprocessed alternatives, especially ones which are convenient and healthier.

Partner with Vypr to Lead the Market

Now is the time to act on these insights.

As you shape your strategies for the coming year, consider how Vypr's **data-driven approach can support your business in staying ahead of the curve with vast insights and product intelligence.** Whether it's through refining your product offerings, enhancing customer engagement, or driving sustainable practices, the actionable insights Vypr can provide can empower you to make informed decisions that resonate with today's consumers.

Don't just react to change—lead it. Contact us today to learn how Vypr's global intelligence platform can help your brand navigate the future of retail with confidence and success. Together, we can shape the industry's future, one insight at a time.

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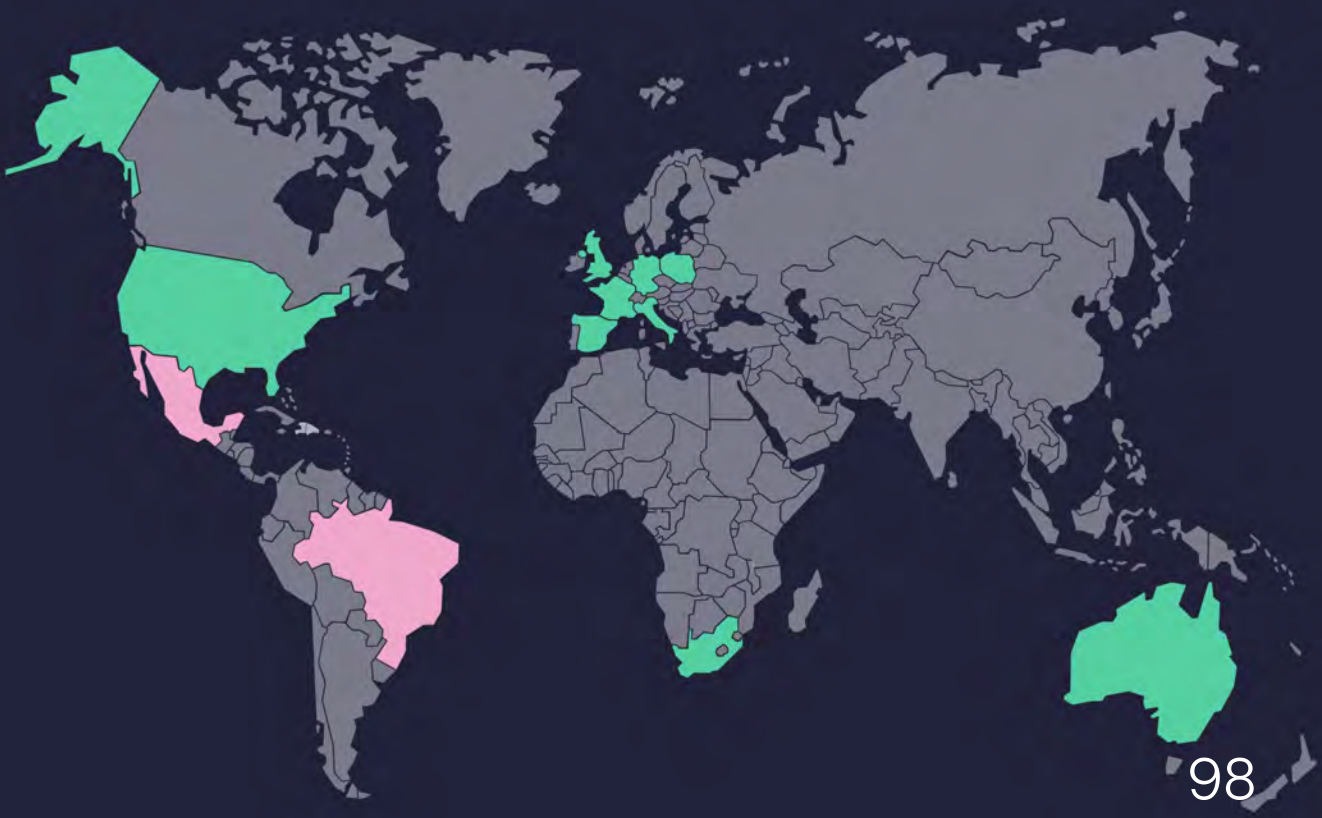

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