



Creating Value in Food: The New Economics of Wellness Claims

April 2026

EXECUTIVE SUMMARY

Why read this report?

Key findings

INTRODUCTION

The economics of wellness in numbers

Amid constrained food volumes, need to create value with health and wellness

PRICING PRESSURE AND CLAIM DEVALUATION IN WELLNESS FOOD

Health priced above average, but premiums continue to compress

Baseline claims give way to selective wellness value engines

From differentiator to expectation: The mainstreaming of core wellness claims

When wellness claims defend relevance, not pricing power

Changing nutritional baselines part of claim devaluation for protein and sugar

Private label accelerates wellness claim mainstreaming

WINNING STRATEGIES: AFFORDABLE WELLNESS AND PREMIUM LEVERS

Dietary staples mainly need affordable wellness; formulated foods, premium wellness

Inherent nutrition as value anchor, particularly in dairy and other food staples

UK pasta: Now squeezed on high protein, mid-tier brands must reframe their offering

In the US, Barilla Protein+ navigates protein claim devaluation with fresh look and fibre claim

UK yoghurt: From protein fortification to recipe focus, format and occasion

Siggi's weaves protein into authentic recipe and star ingredient narrative

Claims with best price premiums: Health outcome prevails, plant-based matters

Sweet snacks retain the strongest wellness premium headroom

US sweet biscuits: "Clean", nutritious mid-range... metabolic health in premium segment

ChipMonk's premium biscuits step into world of GLP-1 style weight regulation

CONCLUSION

Recommendations

The evolving economics of wellness

Questions we are asking

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