

Consumer ingredient perceptions

2025 | EMEA Wave 4



What is it?

- Cargill's proprietary bi-annual tracker of EMEA consumer ingredient perceptions
- 2025 results assessed 65 ingredients in 6 markets among over 3,000 respondents

What can we learn?

- Which ingredients drive seeking or avoidance of a food & beverage product
- How perceptions change over time
- What the relationship is between familiarity, perceived healthfulness and the purchase impact

Key measures

Familiarity

Consumers tell us how familiar they are with each ingredient

Health perception

Consumers tell us how healthy they perceive each ingredient to be

Purchase impact

Consumers indicate whether each ingredient would make them more or less likely to purchase a product

Let's give you a snapshot of the type of insights we gathered

1 The importance of the ingredient list remains unchanged, yet the reason to consult it is shifting more towards seeking ingredients



Ingredient reading likelihood

64%
Extremely / Very likely to check ingredient list (+2pts)*



Reason to check ingredients

Seek **51%** ↑
Extremely / Very likely (+6pts)*

Avoid **58%**
Extremely / Very likely (+1pts)*

Seeking behavior increased significantly compared to the previous wave, closing the gap versus avoiding.

Base: N= 3121. Q2.1: When you shop for packaged food or beverages that you never purchased before for your household, how likely are you to look at each of the following kinds of information provided at the shelf or on the package? Q2.2: When you look at the ingredient list on a packaged food or beverage, how likely are you to do so because you are trying to...? *By comparison with previous Wave.

2 Consumers are willing to pay more for products that contain healthy ingredients such as biotics, fibers, proteins and oils



Perceived as the healthiest

"Natural" sounding ingredients and "sought after ingredients" are perceived as the healthiest. Biotics, proteins, fibers and oils are among the ingredients perceived to be most healthy. From a botanical point of view sunflower, grape (chick)pea and seaweed are occurring most.

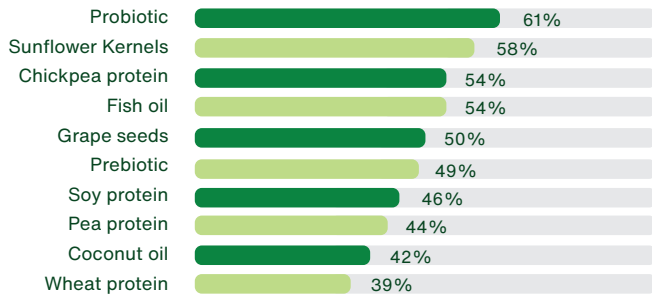


Willing to pay 10% or more

56% ↑
Strongly agree / Agree (+7pts)*

Consumers are willing to pay 10% more for a food or beverage product with healthier ingredients than other options.

Health perceptions (NET Scores)
NET Scores = Good for you (T2B) minus Bad for you (B2B)



*By comparison with previous Wave.

Ingredient types included in our study:

- Cocoa & chocolate
- Proteins
- Fats & oils
- Sweeteners
- Fibers & biotics
- Texturizers

Base: Among those asked for each ingredient. N= 1161-1290 per ingredient (each respondent evaluated 25 of the 65 ingredients). Q3.2: Please indicate how good or bad for you each of these ingredients is, in your opinion. Please select the number on the scale that best corresponds to your opinion.

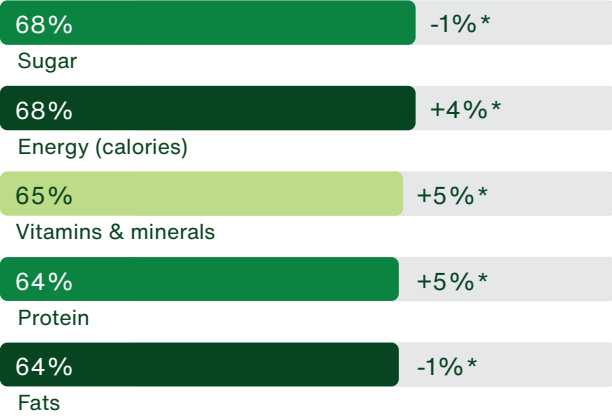
3 Consumers continue to shift away from sugars, towards weight management with a preference for natural sweeteners



Sugar and calories are most likely to be looked at by consumers

The 'sought after' ingredients (vitamins & minerals, protein, fiber) all jumped up more strongly

Extremely / Very likely to look at the following kinds of nutritional information (among those who look at nutritional information):



Base: Among those who look at nutritional information N= 2617
 Q4.3: When you are looking at the nutritional information on a packaged food or beverage, how likely are you to look at each of the following kinds of information?
 * Vs previous Wave.



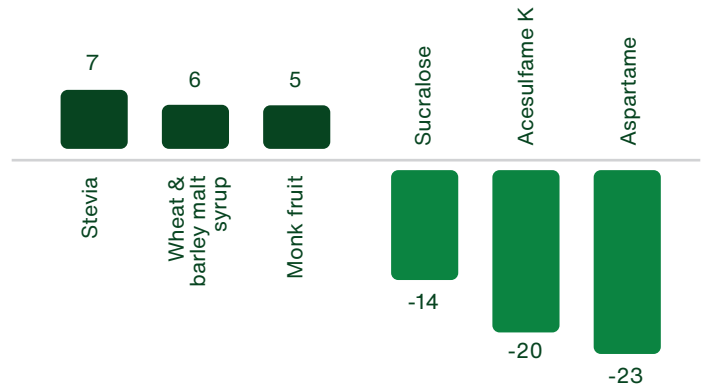
The NET Purchase impact of sweeteners

Sweeteners remains mostly (slightly) negative, with Stevia being one of the few exceptions, having the highest positive purchase impact.

Wheat & barley malt syrup and monk fruit have a positive NET Purchase impact which has also increased versus Wave 3 (2022).

Wave 4 NET Purchase impact

NET = More Likely (T2B) minus Less likely (B2B)



Base: N= 1184-1211. Q3.3: If you were doing your grocery shopping and noticed the following ingredients on a food or beverage ingredient list, do you think it would make you more likely to purchase the product, less likely to purchase the product, or would it make no difference in your decision?

4 Consumers continue to look for products with ingredients they are familiar with. Bringing more natural cues helps to build trust in your products



High importance of 'label-friendly'

- 70% Recognizable ingredients
- 64% Avoid food with artificial ingredients
- 62% Products with fewer ingredients on labels



Ingredients with more natural cues are perceived healthier

NET Health perceptions

NET Scores = Good for you (T2B) minus Bad for you (B2B)

Botanical origin

Corn starch	23%
Starch	18%

Sunflower formats

S. kernels	58%
S. oil	39%
S. flour	26%

Base: N= 3121Q4.2: Please indicate how strongly you personally agree or disagree with each statement.

Contact your Cargill account manager for more information

