

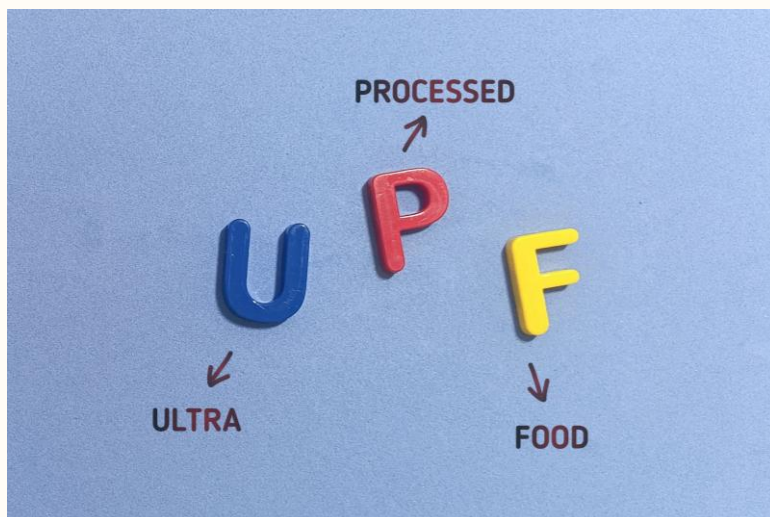
14th July 2026

Brave New World: UK Consumer's New Health & Wellness Reality

JETRO



Agenda



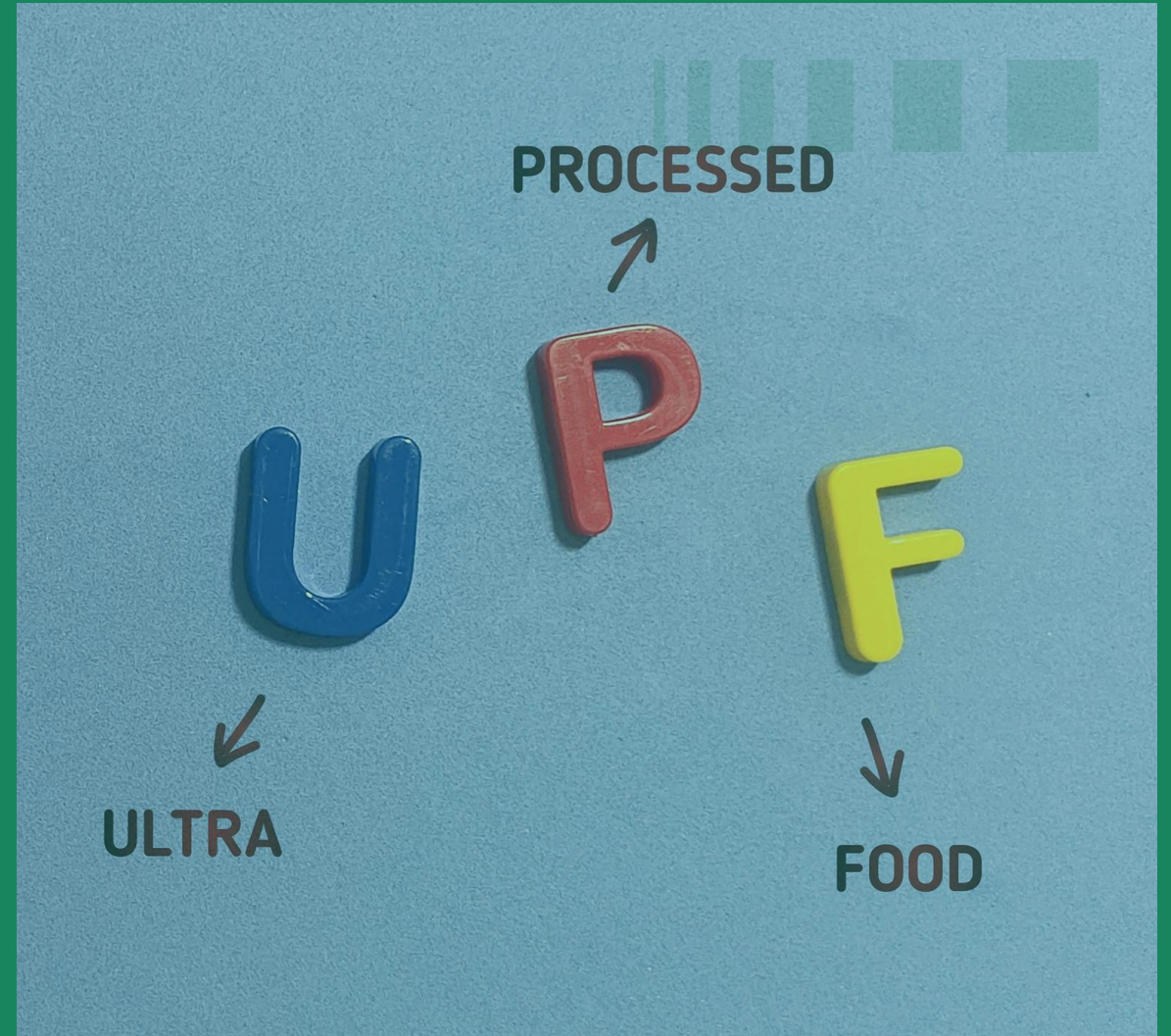
UPF & functional foods
(Global & UK)



GLP-1
(UK-only)

Source: Lumina Intelligence, 2026

UPF & Functional Foods



What are ultra-processed foods?



The NOVA classification system, developed in Brazil in 2009 (but currently being reviewed), groups food into four categories based on the extent of industrialised processing:

- **Group 1:** Unprocessed or minimally processed foods (fruits, veg, eggs)
- **Group 2:** Processed culinary ingredients (oils, salt, and sugar)
- **Group 3:** Processed foods (canned vegetables or bread)
- **Group 4: Ultra-processed foods**

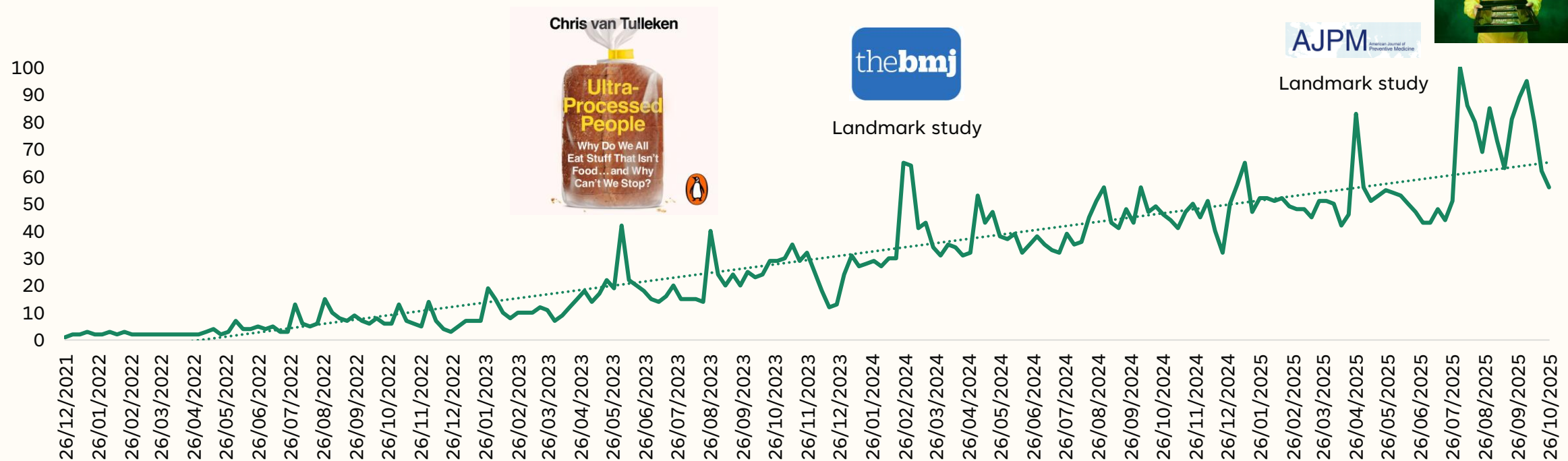
“Formulations of ingredients, mostly of exclusive industrial use, made by a series of industrial processes, many requiring sophisticated equipment and technology”

Source: Lumina Intelligence <https://thenutritionconsultant.org.uk/ultra-processed-foods> , <https://upfzero.com/nova-classification-system>

UPF is gathering consumer interest, peaked by media launches

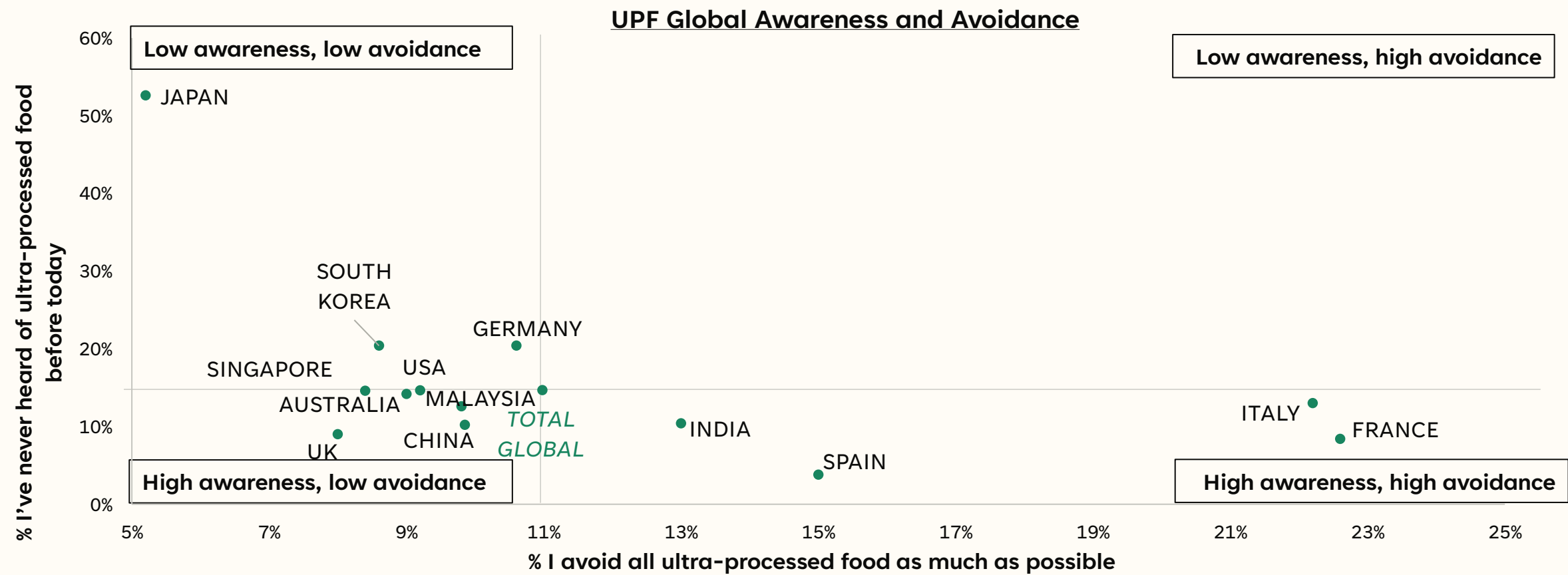


Google Trends: Topic - Ultra-processed food: (Worldwide)



Source: Lumina Intelligence, Google Trends

European countries have high awareness and often, high avoidance of UPF



Distaste for UPF is growing – and fast

53%

say they have a **less favourable view** of UPF than they used to



60%

actively avoid some or all UPF

43%

say their views of UPF have changed **in the past year**



59%

actively avoid some or all UPF



Social media was the top driver of changing views

Source: Lumina Intelligence & Food Navigator, Future Food Global Study September 2025

Consumers view UPFs as bad for your health



If you hear the term “ultra-processed food”, what comes to your mind?



Source: Lumina Intelligence & Food Navigator, Future Food Global Study September 2025

Top term by country

Foods that are bad for your health



Foods with long ingredients or unfamiliar additives



Fast food or takeaways



Protein remains the top benefit bought



Top added benefit bought

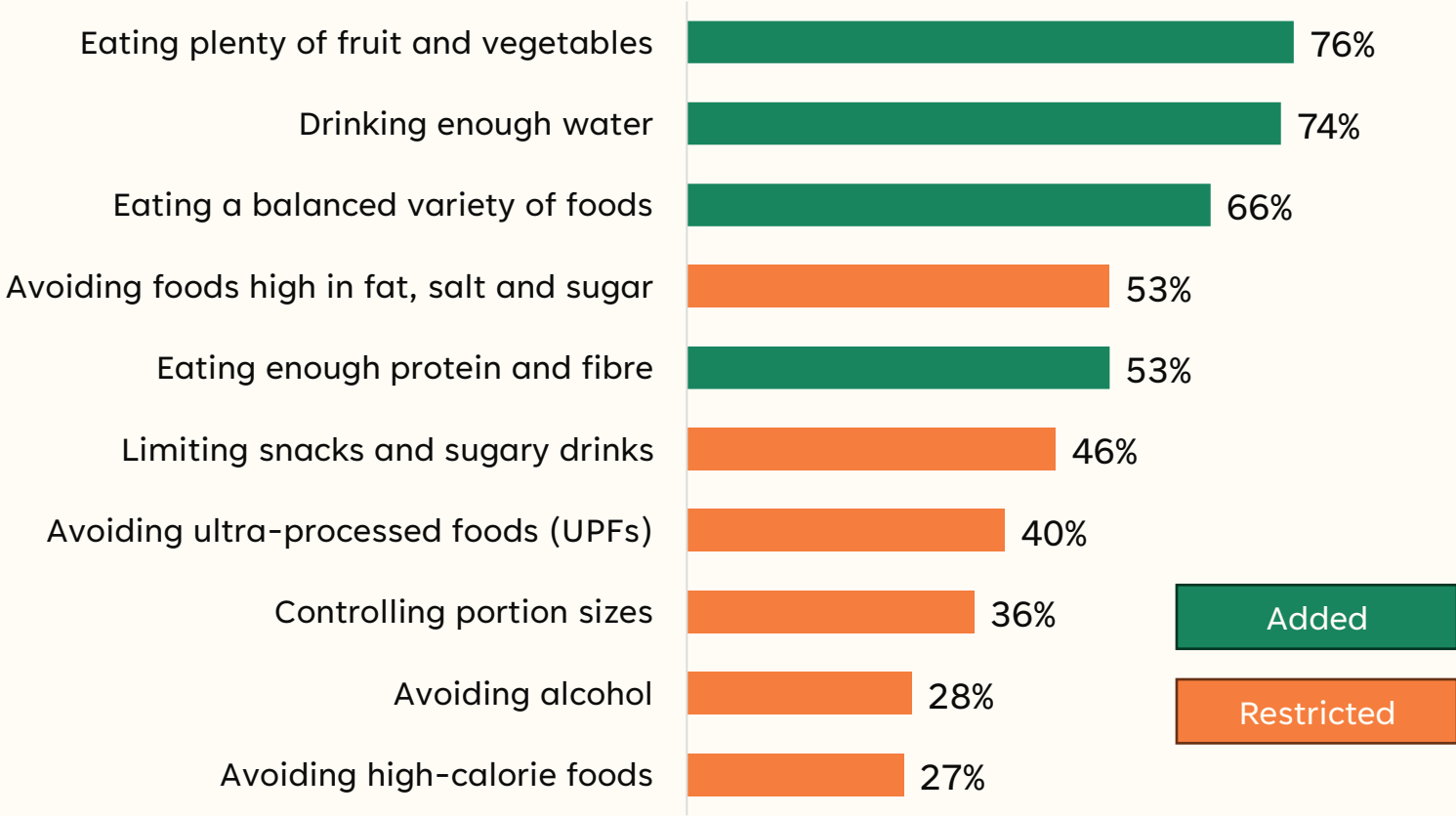
- 1 Added Protein 
- 2 Added Vitamins & Minerals 
- 3 Gut Health 
- 4 Immune Support 
- 5 Energy or Focus

Source: Lumina Intelligence & Food Navigator, Future Food Global Study September 2025



Both UPF and GLP-1 innovation taps into wider health trends around functional foods and added protein

Which of the following do you consider the most important components in a healthy diet? - UK



Source: Lumina Intelligence, Future Food Global Study September 2025, Sample size n= 500

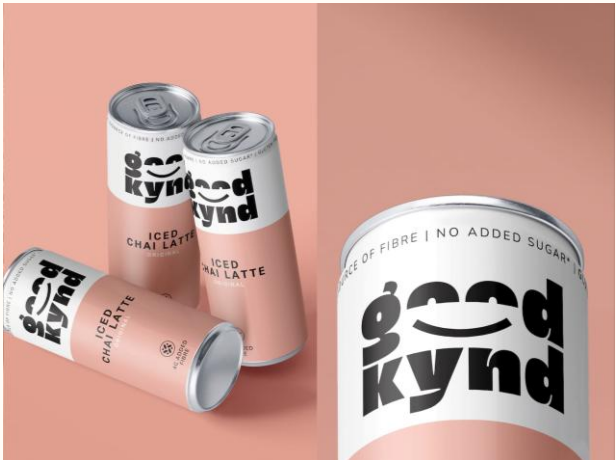
Functional ingredients, protein and fibre continue to shape health innovation in the UK



76%
are interested
in functional
ingredients

36%
buy food with
added protein

39%
Want to see
more fibre in
products



Source: Lumina Intelligence UPF Study, Starbucks, Trinco, Tesco, Good Kynd

GLP-1



Nearly 5% of UK adults are currently using GLP-1



4.7%
Currently taking GLP-1

5.2%
Use GLP-1 in the past

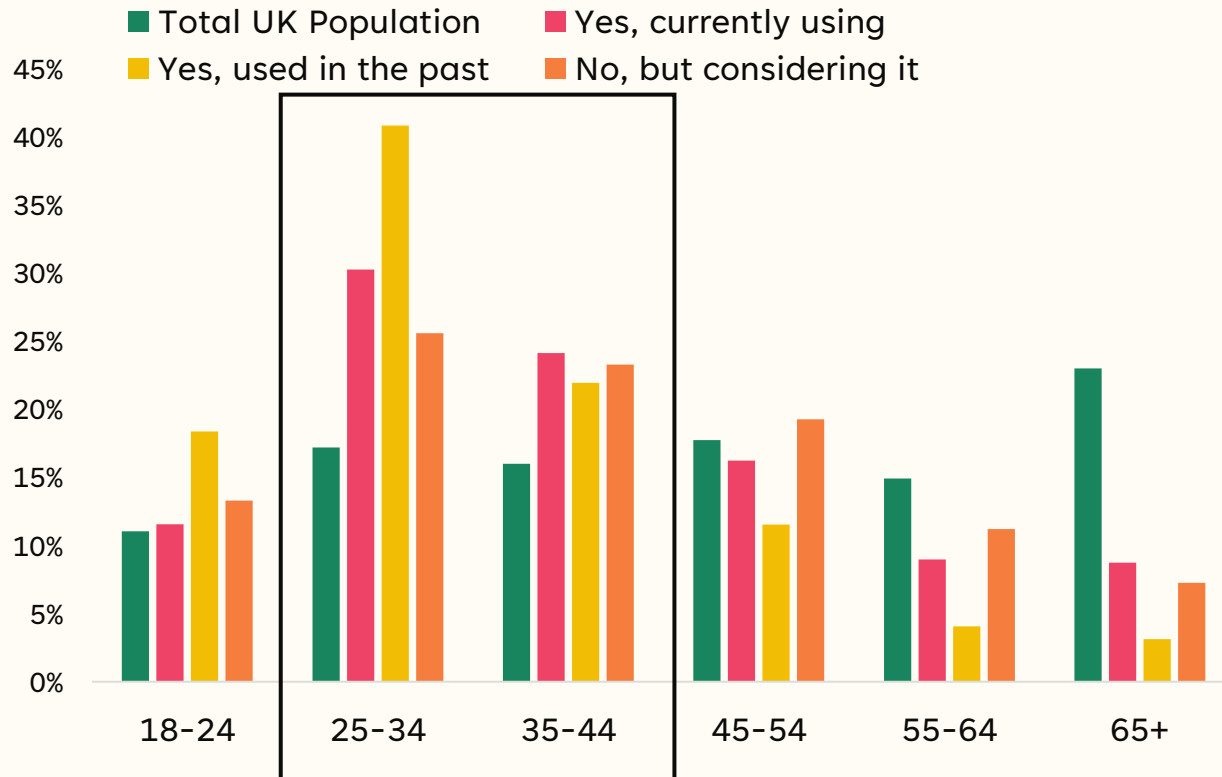
9.6%
Considering taking GLP-1

Source: Lumina Intelligence, GLP-1 Tracking 28 w/e 01.03.26

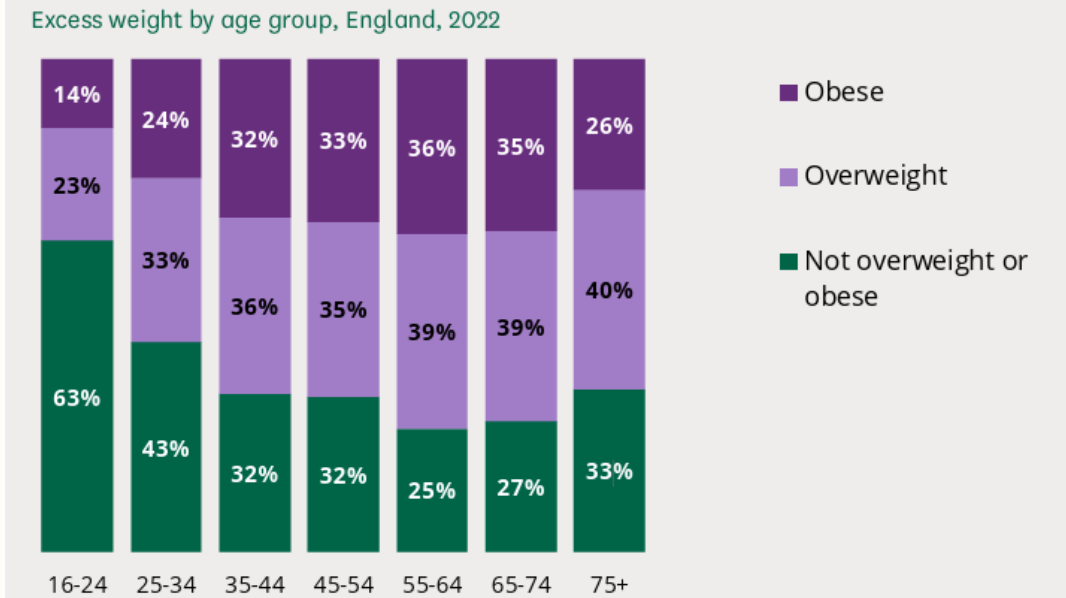
25–44-year-olds are most likely to be currently using GLP-1, indicating a disparity between obesity prevalence and current users



Do you use GLP-1 Medication?



Government Statistics – England, 2022



Source: NHS Digital, [Health Survey for England 2022](#), Table 1

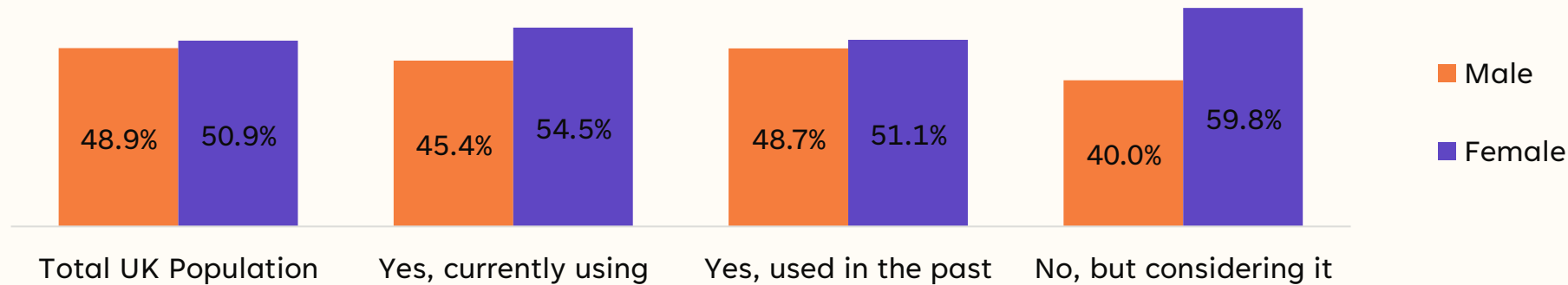
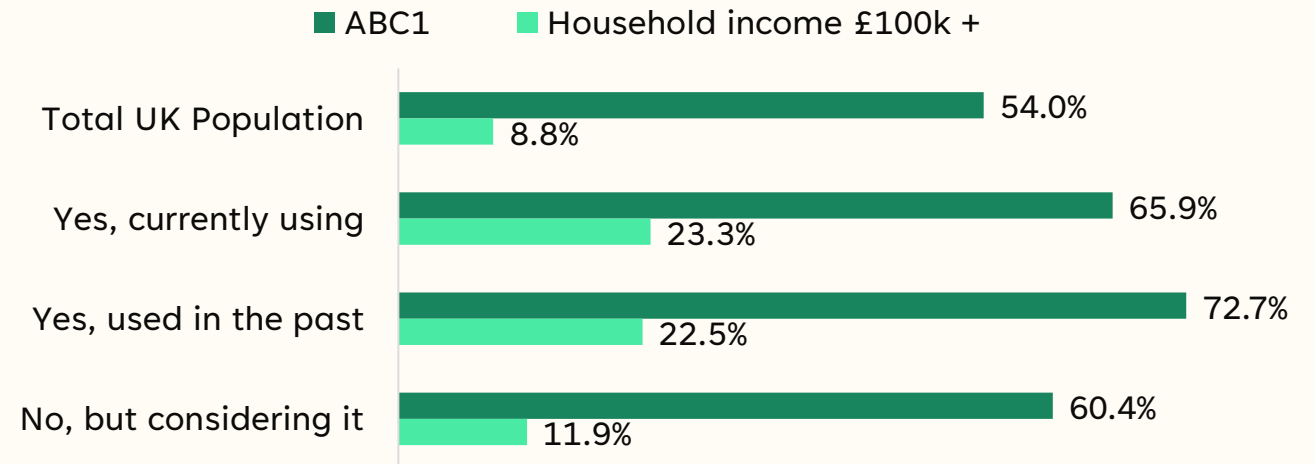
Source: Lumina Intelligence GLP-1 Tracking 28 w/e 01.03.26, House of Commons Library Obesity Statistics

Over 90% of GLP-1 users in the UK are estimated to pay for the medication. Current and lapsed users are therefore affluent, with nearly one in four household income over £100k



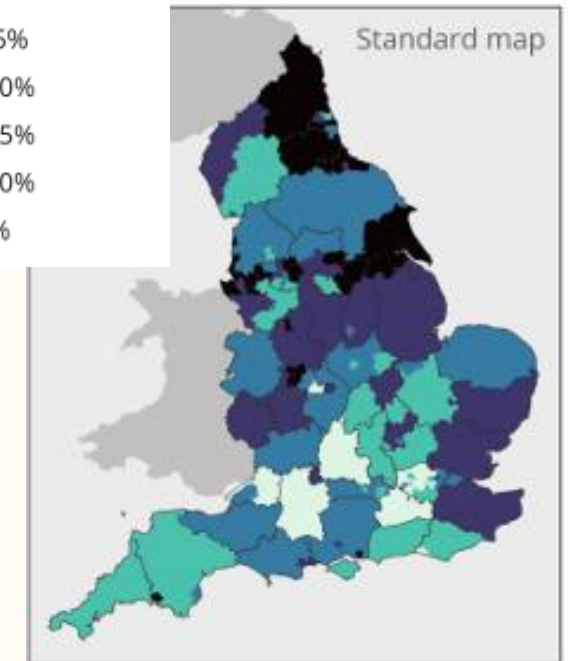
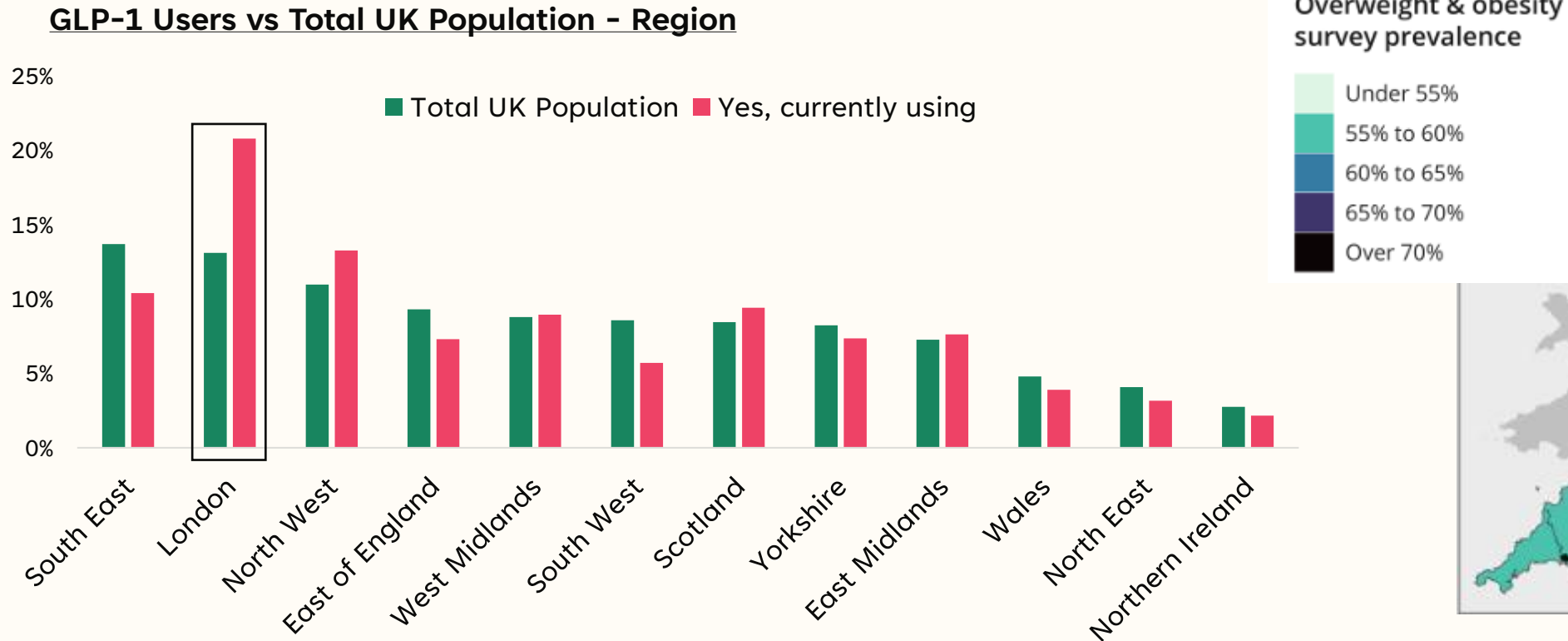
Who are GLP-1 users?

How weight-loss injections are turning obesity into a wealth issue



Source: Lumina Intelligence GLP-1 Tracking, 28 w/e 01.03.26, BBC

One in five current users reside in the capital, despite London having some of the lowest overweight and obesity prevalence in the UK

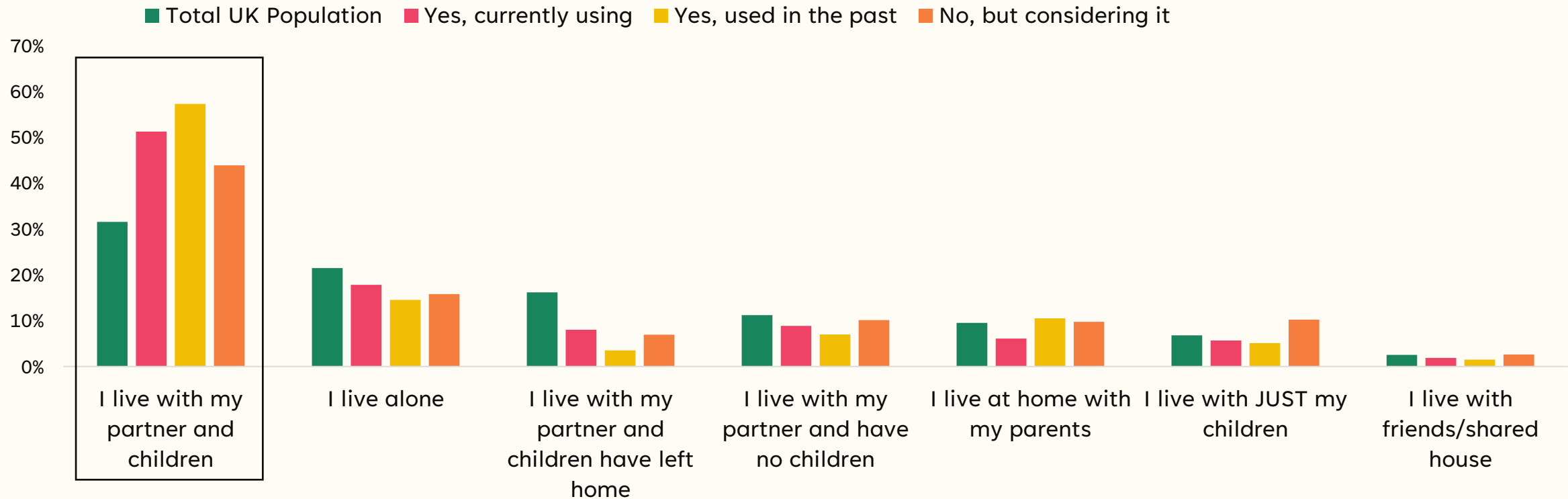


Source: Lumina Intelligence GLP-1 Tracking 28 w/e 01.03.26, House of Commons Library Obesity Statistics

GLP-1 users are more likely to live with their partner and children, representing nearly half of users



GLP-1 Users vs Total UK Population – Living Situation



Source: Lumina Intelligence GLP-1 Tracking 28 w/e 01.03.26

There is a polarised spectrum of GLP-1 users to consider



ABC1
London
25-44

13% of GLP-1 Current
Users
vs **5%** Total Population
ix. 252

C2DE
Outside London
18-24 and 45+

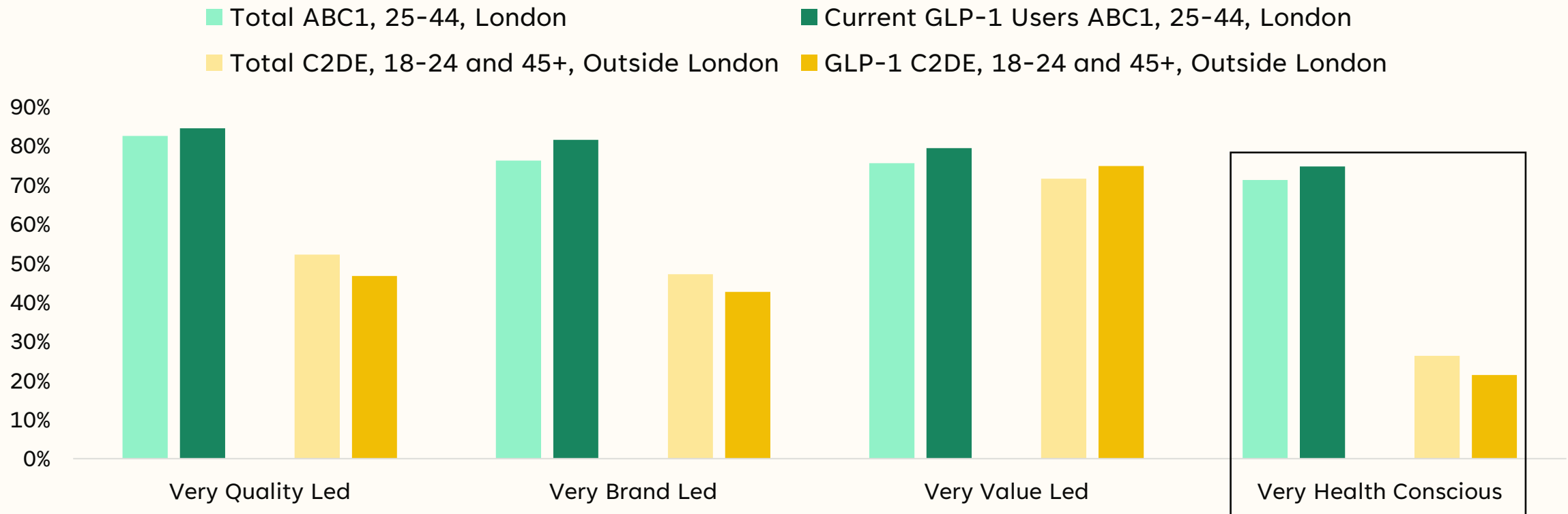
20% of GLP-1 Current
Users
vs **32%** Total Population
ix. 63

Source: Lumina Intelligence GLP-1 Tracking 28 w/e 01.03.26

GLP-1 users can not be treated as a homogenous group, they need to be targeted differently



Psychographics



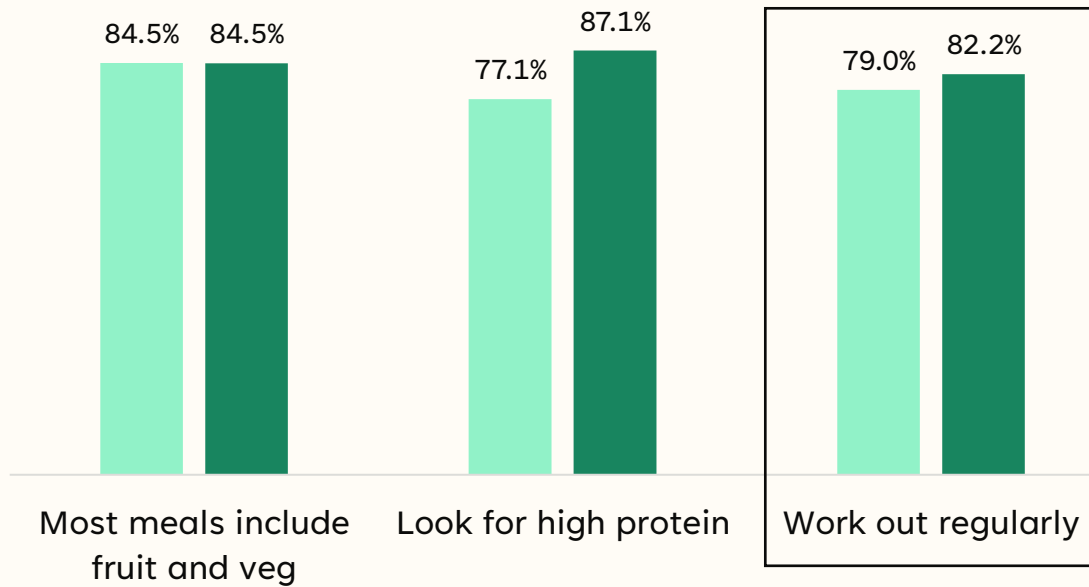
Source: Lumina Intelligence GLP-1 Tracking 28 w/e 01.03.26

Protein is a consistent driver for GLP-1 users in both groups



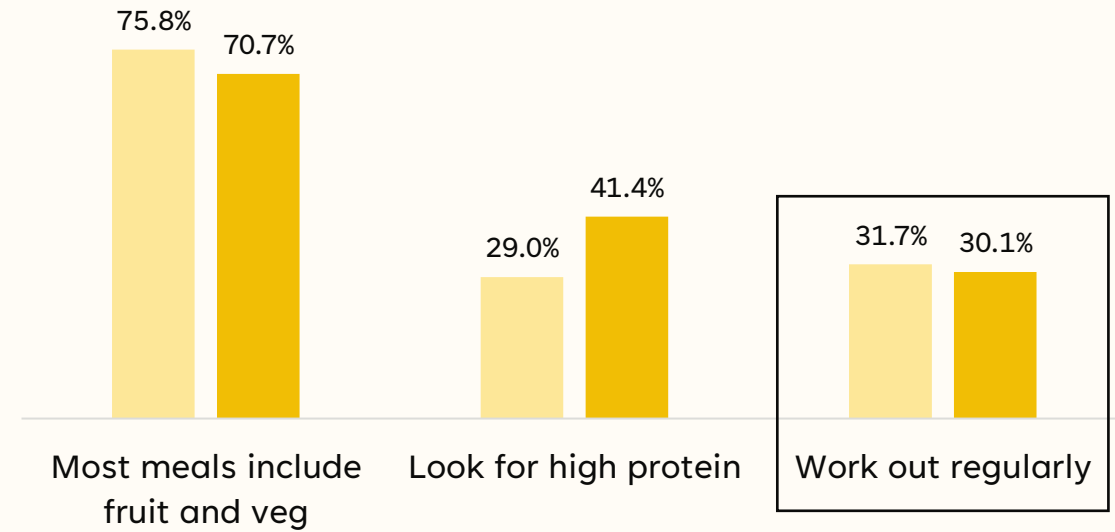
Health Behaviours – ABC1, London, 25-45 – % Agree

■ Total ■ GLP-1 Current Users



Health Behaviours – C2DE, Outside London, 18-25 and 45+ – % Agree

■ Total ■ GLP-1 Current Users

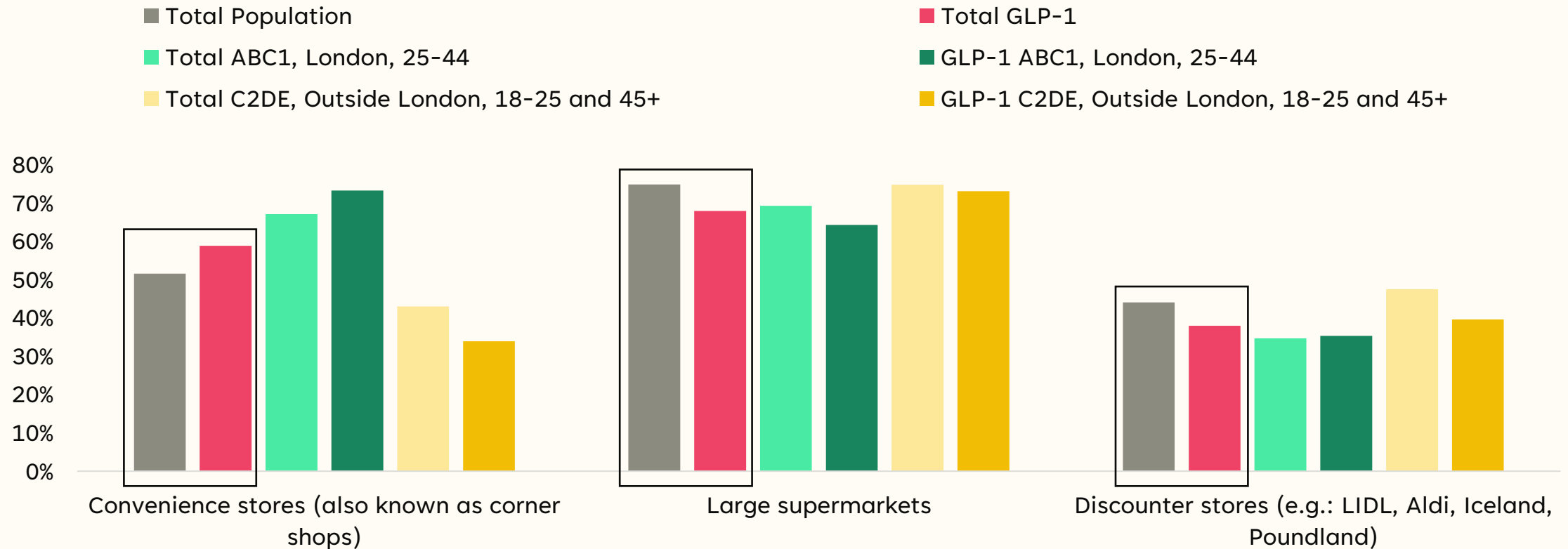


Source: Lumina Intelligence GLP-1 Tracking 20 w/e 04.01.26

GLP-1 presents an opportunity for Convenience Stores in affluent areas and London



Type of stores visited last month



Source Lumina Intelligence GLP-1 Tracking 28 w/e 01.03.26

GLP-1 innovation (retail)



Sainsbury's - £3.75



Co-op £3.50



Morrisons - £3.75



M&S - £7.00



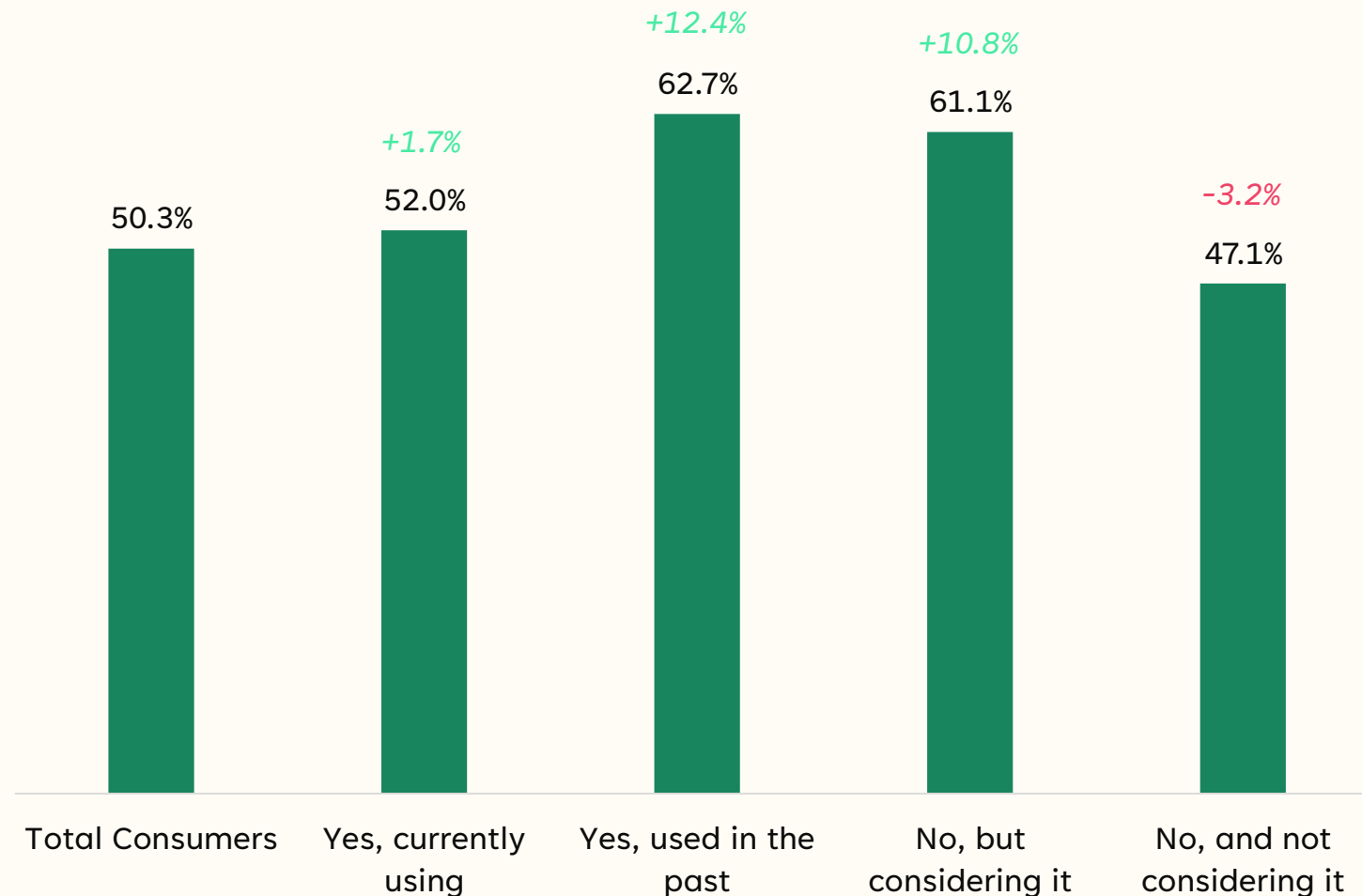
ASDA - £2.50

Source: The Grocer, Retailer Websites



**Over half of GLP-1
current users had an
out of home occasion
in the past week**

% who had an OOH occasion in past week



Source: Lumina Intelligence GLP-1 Tracking 4w/e 15.03.26

Sample size GLP-1 current users: 177

GLP-1 innovation (OOH)

HIGH PROTEIN- LOW CALORIE BOWL

36g Protein | **GLP-1 Friendly**

Adobo Chicken, Supergreens Lettuce Mix, Fajita Veggies, Fresh Tomato Salsa, and Guacamole

ADD TO BAG

CUSTOMIZE



HIGH PROTEIN-HIGH FIBER BOWL

46g Protein | 14g Fiber | **GLP-1 Friendly**

Adobo Chicken, Light Brown Rice, Black Beans, Fajita Veggies, Corn Salsa, Fresh Tomato Salsa, and Lettuce

ADD TO BAG

CUSTOMIZE



health[ier] menu

filter by ▾ sort by ▾



little Thai chicken curry
12.25 plant points



little spicy chicken teriyaki
9.75 plant points



little grilled katsu chicken
curry
9 plant points

Source: Operator Websites

GLP-1 users are more likely to opt for lighter, sharable dishes, while avoiding fried, heavy food



GLP-1 Current Users Dish Preferences

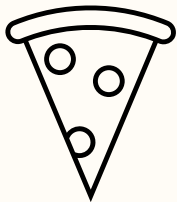
Proportionally more likely to order



Salad



Wraps



Pizza

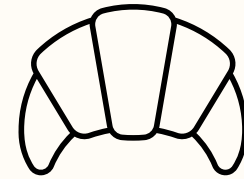


Pasta

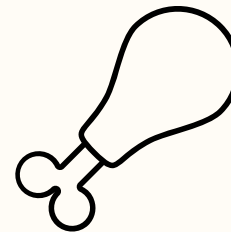
Proportionally less likely to order



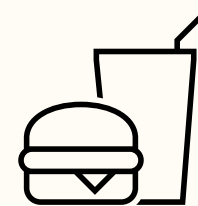
Ice Cream



Pastries



Chicken/wings/
tenders



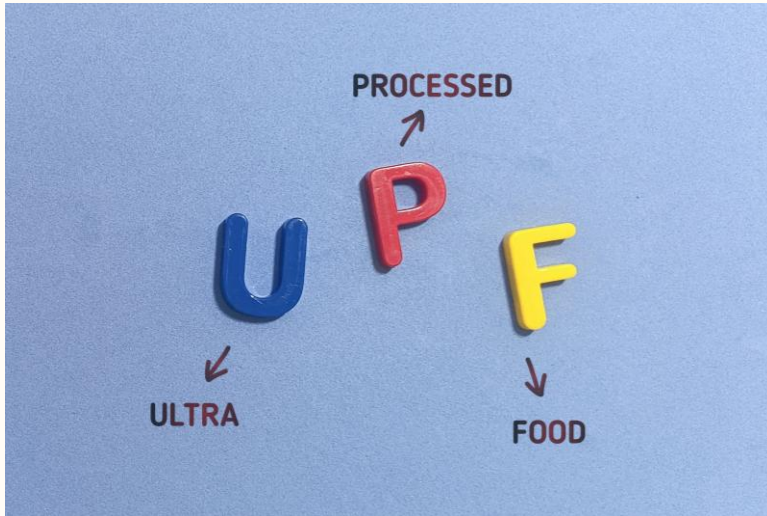
Burgers



Fries

Source: Lumina Intelligence GLP-1 Tracking 4w/e 15.03.26

Agenda



UPF & Functional Foods

UPF avoidance is an undeniable trend. Minimal processing and signposting is key, especially with natural, functional ingredients. However, there is still a place for fortification; consumers want products with added benefits and nutritional value.

Source: Lumina Intelligence, 2026



GLP-1

UK GLP-1 consumers are disproportionately affluent, London-based millennials. Demographic is a greater influencer of behaviour than simply using GLP-1 medication, and consumers should not be treated homogenously. High protein is a consistent driver across demographics.

Thank you for listening



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