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Rebuilding Relevance in Big Food: Why Consumer-Led Innovation Must Power the Next Phase

Executive Summary

For a few years, large food manufacturers seemed almost unstoppable.

During the pandemic, strong supply chains, trusted brands and simplified product portfolios helped many of the world's biggest food companies outperform competitors. Products remained available when consumers needed them most, and many organisations emerged from the period with stronger sales and healthier margins.

Today, the picture looks very different.

Across many markets, volume growth has slowed or declined. Private label brands are gaining momentum, shoppers are becoming more selective about where they spend their money, and leadership teams are facing growing pressure to deliver results in a much more competitive environment.

This is not simply a short-term challenge caused by inflation or changing market conditions. It reflects a broader shift in consumer behaviour. People have more choice than ever before, less loyalty to established brands, and tighter household budgets. In this environment, being available is no longer enough. Brands must prove their value every day.

The good news is that this moment presents an opportunity.

Companies that place consumers back at the centre of decision-making, invest in meaningful innovation, and develop a deeper understanding of everyday behaviours will be best positioned for future growth. The next chapter for Big Food will not be written by cost-cutting alone. It will be shaped by organisations that understand how people actually live, shop, cook and eat.

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How We Moved from Pandemic Growth to Market Reality

The pandemic created conditions that strongly favoured large food manufacturers.

While many businesses struggled with disruption, established food companies benefited from resilient supply chains and the ability to keep products on shelves when consumers needed them most. At the same time, many organisations reduced product complexity by focusing on core, high-performing SKUs.

Consumers were also spending more time at home. Meals that might previously have been eaten in restaurants, offices or schools were now being prepared in kitchens. Demand increased across a wide range of food categories, creating a period of growth that few could have predicted.

For many businesses, these conditions reinforced the belief that scale, efficiency and brand recognition would continue to be the primary drivers of success.

However, markets rarely stand still.

As the world moved beyond the pandemic, a different set of challenges emerged. Rising commodity prices, supply chain disruptions and geopolitical tensions increased costs throughout the food industry. Manufacturers responded with multiple rounds of price increases, often out of necessity.

At the same time, private label producers and smaller challenger brands rebuilt their operations and returned to the market with competitive pricing and focused innovation.

Consumers noticed.

Many households began asking a simple question: **Is this product really worth the extra cost?**

For some brands, the answer was clear. For others, it was not.

The result has been a marketplace where size alone no longer guarantees success. Consumers are comparing options more carefully and switching brands more readily than they have in years.

Why Leadership Changes Are Happening Across the Industry

The increase in leadership changes across major food companies has attracted considerable attention.

While executive turnover is often viewed as a sign of instability, it can also be seen as a sign that organisations recognise the need for change. Boards are increasingly questioning whether traditional growth strategies are still fit for purpose in today's market.

Many companies are looking for leaders who bring stronger consumer understanding, digital capabilities and innovation experience. They are searching for new ways to reconnect brands with changing consumer expectations.

Yet leadership changes alone will not solve the underlying challenge.

The real issue runs deeper than any individual executive. Many organisations are still operating with systems, processes and assumptions that were built for a different consumer environment.

In some categories, consumption habits are changing. In others, health expectations are evolving. Some shoppers are moving towards fresh food options, while others are seeking greater convenience. Across nearly every category, consumers are reassessing value.

Replacing leadership without addressing these broader shifts risks repeating the same strategy with a different team.

The Consumer Has Changed. Have Food Portfolios Changed Too?

One of the biggest challenges facing Big Food is that consumers have changed faster than many portfolios have.

Today's shoppers have access to more options than ever before. Traditional supermarket shelves are only part of the picture. E-commerce platforms, rapid delivery services and specialist retailers have expanded the competitive landscape significantly.

At the same time, loyalty has become harder to earn and easier to lose.

Consumers are increasingly willing to experiment with private label products, regional brands and emerging challengers. If a product offers similar quality at a lower price, many shoppers are happy to switch.

This does not mean brands no longer matter.

It means brands must work harder to justify their place in consumers' baskets.

Budget pressures have amplified this trend. After several years of inflation, many households are making deliberate trade-offs. They may choose premium products in categories they care deeply about while looking for savings elsewhere.

In this environment, brands need clear answers to three important questions:

Why does this product matter?

What problem does it solve?

Why is it worth paying more for?

The brands that can answer these questions clearly are far more likely to maintain relevance and growth.

Why Innovation Needs to Matter Again

Walk through any supermarket today and you will find countless examples of innovation.

New flavours. New packaging. New formats. Limited editions. Seasonal launches.

Yet surprisingly few of these innovations create lasting impact.

Many product launches are incremental improvements rather than meaningful solutions to real consumer needs. They generate short-term attention but struggle to build long-term demand.

This is one reason innovation productivity has become a growing concern across the industry.

Successful innovation rarely begins with a product idea. It begins with a consumer problem.

Perhaps busy parents need simpler meal solutions on weekday evenings. Perhaps health-conscious consumers want products that fit their goals without sacrificing taste. Perhaps shoppers are looking for ways to reduce food waste at home.

When innovation starts with genuine consumer tensions, it becomes easier to create products that people actually want to buy again and again.

At the same time, companies must be realistic about the categories in which they compete.

Not every category can be revived through marketing or product launches alone. Some categories require fundamental change. Others may need investment, partnerships or even difficult decisions about where future resources should be allocated.

The most successful organisations will be those willing to make these choices based on consumer realities rather than historical assumptions.

Why Understanding Real Life Matters More Than Ever

For decades, surveys, focus groups and panel data have played an important role in consumer research.

These tools remain valuable. However, they only tell part of the story.

People often describe their behaviour differently from how they actually behave.

A consumer may say they prioritise healthy eating, yet their fridge may reveal a more complex reality. Healthy ingredients sit alongside convenience foods, family favourites and occasional indulgences. The choices people make are influenced by time, habit, family dynamics, budget and countless other factors.

This is why newer approaches such as mobile ethnography and video-based consumer research are becoming increasingly important.

Watching how products are stored, prepared and consumed provides a level of context that traditional research often struggles to capture.

A short video recorded in a family kitchen can reveal frustrations that never appear in a survey. Packaging that is difficult to open. Products forgotten at the back of the fridge. Workarounds consumers have created to solve problems themselves.

These moments may seem small, but they often contain the seeds of future innovation.

They help organisations move beyond assumptions and understand what daily life really looks like for the people they serve.

Perhaps most importantly, video brings consumers closer to decision-makers.

A chart can communicate data. A video can communicate experience.

When leadership teams see real consumers navigating real challenges, conversations often become more focused, practical and meaningful.

Bringing Consumer Understanding Back into Strategy

Consumer insight should not sit on the sidelines of business strategy.

The organisations that thrive in the coming years will be those that make consumer understanding a core part of how decisions are made.

This means moving beyond occasional research projects and building a culture of continuous listening.

It means combining sales data with behavioural insights. It means balancing quantitative research with observation. It means understanding not only what consumers buy, but why they buy it.

Most importantly, it means ensuring that consumer realities remain visible at every level of the organisation.

When discussions about innovation, investment and portfolio decisions begin with genuine consumer needs, companies are more likely to create products that remain relevant over time.

A Positive Turning Point for Big Food

The food industry has reinvented itself many times before, and it will do so again.

While volume pressures, private label competition and leadership changes may dominate headlines, they also represent an opportunity to rethink how growth is created.

The next generation of successful food brands will not necessarily be the ones with the biggest budgets or the largest portfolios. They will be the brands that stay closest to consumers, understand changing behaviours and respond with solutions that genuinely improve everyday life.

In a world where shoppers have more choice, less loyalty and tighter budgets than ever before, relevance has become one of the most valuable competitive advantages.

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The companies that learn fastest from consumers will be the companies that grow.

And increasingly, those lessons will come not only from reports and dashboards, but from real kitchens, real homes and real people.

The Consumer Is Already Showing You the Answers

The question is whether your organisation is seeing them.

Every day, consumers reveal how they shop, cook, store food, substitute products and make purchasing decisions. Hidden within these everyday behaviours are the opportunities that shape future growth.

At Neotrigen, we help brands capture and understand these moments through video-based consumer research and digital ethnography. The result is richer insight, stronger innovation and decisions grounded in reality rather than assumption.

If your organisation is looking to build products, portfolios and strategies around real consumer behaviour, we'd love to continue the conversation.

Learn more about how Neotrigen helps brands turn consumer reality into business growth.