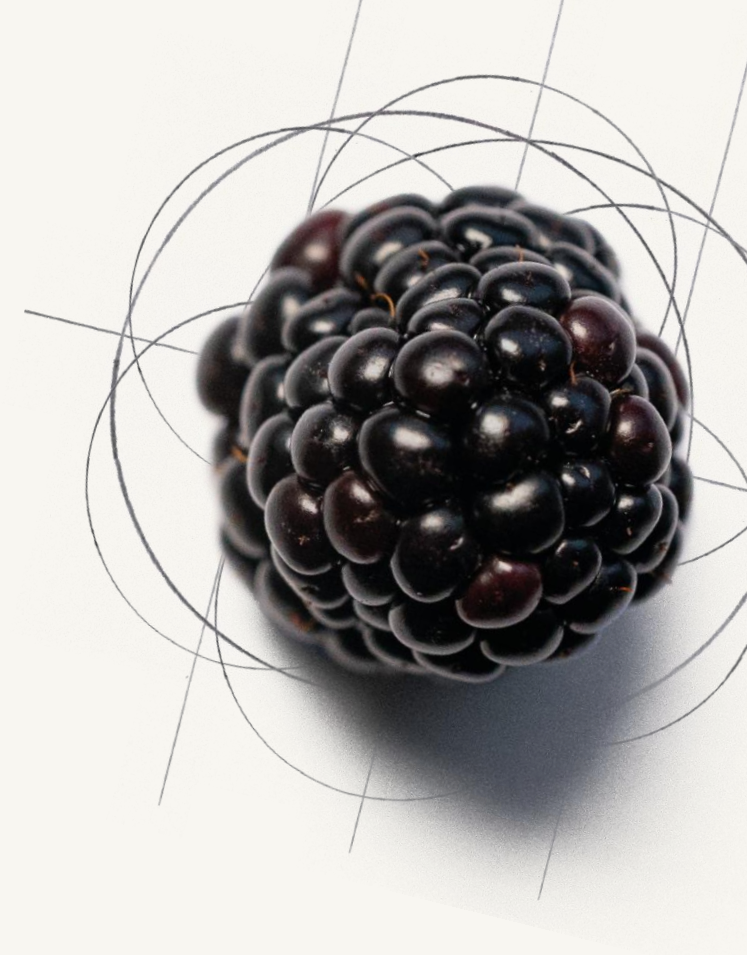




The
BRAMBLE
INTELLIGENCE 40

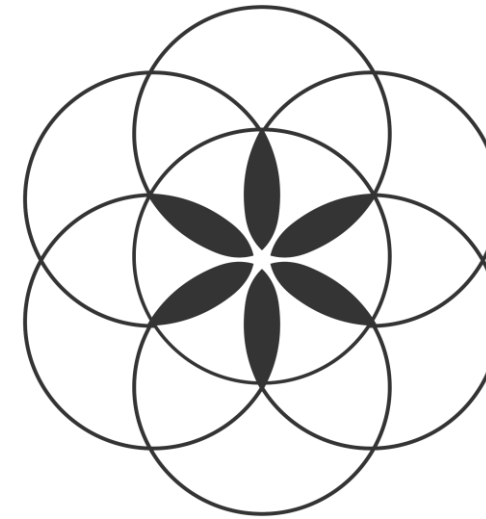
The companies creating the products, services and infrastructure for “*Tomorrow’s Appetites*”

WHO IS BRAMBLE?

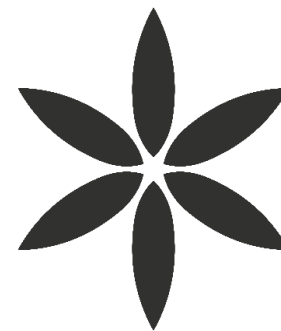
Bramble Partners is an advisory and investment firm.

Our mission is to build a thriving food system that generates prosperity, restores the environment and provides nourishing food for everyone.

We believe the value in the food system of the future will be won by businesses that share this mission.

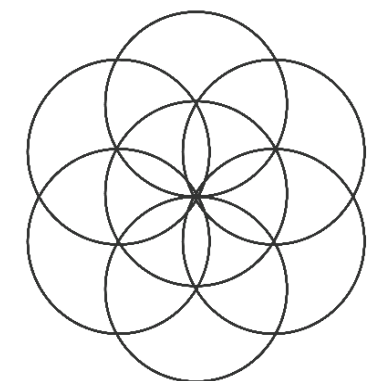


BRAMBLE
PARTNERS



INTELLIGENCE

We use our proprietary insight and evidence to help leaders spot opportunities, avoid risks and capture value as the food system changes.



INVESTMENTS

Bramble Fund I is a £100m venture fund investing across the food system value chain – from soil to gut. We back the most ambitious food system innovators across the UK and Europe, at Series A to Growth stage.

WHAT IS THE BRAMBLE INTELLIGENCE 40?

The **Bramble Intelligence 40** is a showcase of companies – from early-stage innovators to giants such as Google – moving to capture the biggest shift of profits in food since the rise of the supermarkets.

In July, Bramble Intelligence published *Tomorrow's Appetites*. It argued that the barbarians are at the gate. Three forces from outside the food industry – **appetite-suppressing drugs**, **artificial intelligence (AI)** and **diet-related diagnostic technology** – are changing what people eat and buy.

These forces bring opportunity as well as threat. They will create four new sources of profitable growth:

1. Making it easy to eat well;
2. Food that nourishes;
3. Ingredients people can trust;
4. The diet and health feedback loop.

We've chosen companies bringing fresh ideas to these new sources of growth. They vary in size, scope and model, and not all will succeed. But each has rising revenue, growing users or a large installed base.

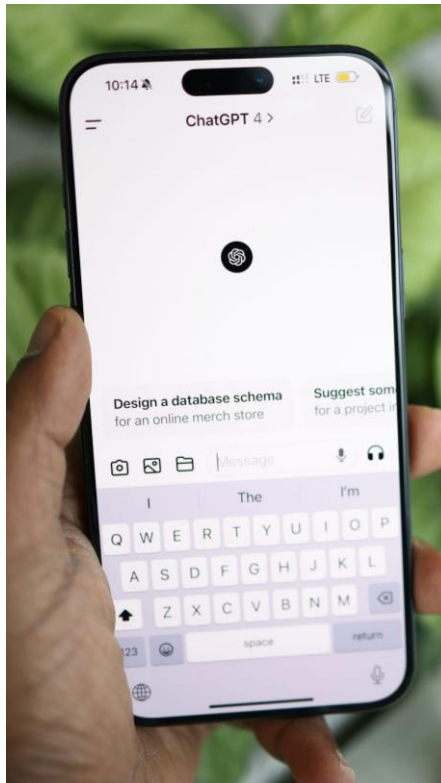
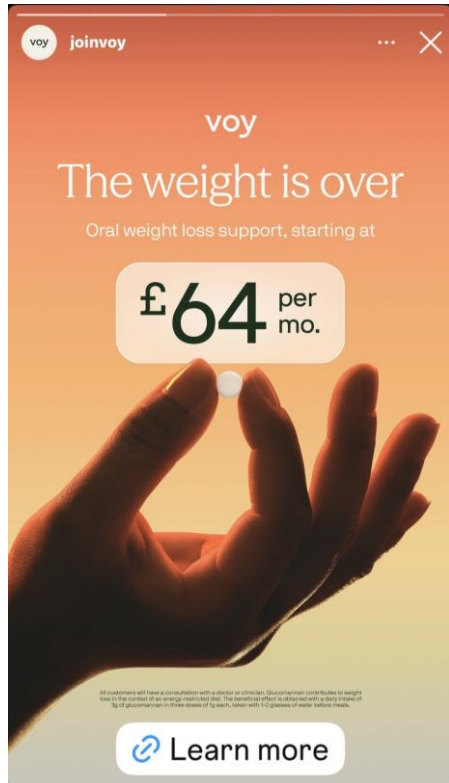
This showcase is anchored in the UK and US, with examples from Asia and Europe. One section is UK-only by design, showing category-defining British food brands.



With thanks to the many experts, academics, investors and exited founders who generously shared their knowledge and views to shape The Bramble Intelligence 40

What is changing the food industry?

Consumers now have three easy tools that help them eat differently



1. **Appetite-suppressing drugs** are moving from clinical use into everyday life faster than any drug class before them. They work because obesity is not a failure of willpower. A single system – linking the gut microbiome, gut and brain hormones and reward circuitry – governs appetite, satiety and energy storage. The drugs act directly on it.
2. **Artificial Intelligence (AI)** is where consumers go to make sense of the flood of contradictory food advice they face from social media and podcasts, mainstream news, influencers and a steady drip of new scientific research.
3. **Diet-related diagnostics** give people what they have always lacked: feedback. Without seeing how their body responds to what they eat, they have neither the proof nor the motive to change behaviour. When people can see results, they will value food differently.

The backdrop: Cost and regulation are tightening at the same time. Climate volatility and geopolitics have turned sourcing from a procurement task into a strategic problem.



The pace of change is accelerating

Availability, access and adoption of these tools by consumers is rapid

	5 YEARS AGO	TODAY	5-10 YEARS – <i>our view</i>
Appetite-suppressing drugs (e.g., GLP-1)	Diabetes treatment, little public awareness	1 in 8 US adults using these drugs ~3M UK adults using these drugs, 95% pay privately - Daily oral formats available - Faster uptake than statins - Generics in India for \$14/month	<i>Prices fall – generics</i> <i>Next generation formats – longer-acting, reduced side-effects, wider set of indications</i>
Artificial Intelligence	Consumer AI applications did not exist	230 million weekly users ask health questions on ChatGPT - More than a third of UK shoppers use AI for online grocery shopping (i.e., meal planning, recipe inspiration)	<i>Agentic shopping fills the basket</i> <i>AI generated information is the default source of nutrition advice</i>
Diet-related diagnostics	Lab science: glucose monitors prescription-only, blood panels expensive	Glucose monitors, blood panels and breath tests sold direct to consumers for under £100 a month	<i>Cheaper and easier to access</i> <i>Improved accuracy of tests and correlation to health outcomes</i>

FOUR VALUE SHIFTS ARE EMERGING

Together, these create a reinforcing feedback loop

CREATING THE DIET AND HEALTH FEEDBACK LOOP

Coaching

Diet advice and behavioural-change support that nudges you to eat better over time

Diagnostics

Wearables, at-home biomarker tests and subscriptions that measure how your body uses nutrition, and what else it needs

FOOD THAT NOURISHES

INGREDIENTS
PEOPLE
CAN TRUST

MAKING IT EASY TO EAT WELL

Inspiration

Recipes and plans that remove the stress from planning and prepping meals

Nutrition Guidance

Simple nutrition scores and suggested swaps that make healthier choices easy

Fulfilment

Making it fast and easy to buy quality, nutritious food

Data Integration

Pulling together purchase, wearable, biomarker and health data to show how food choices shape your health

The Bramble Intelligence 40

Each value shift is creating new business opportunities

MAKING IT
EASY
TO EAT WELL

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British Brand showcase – globally there are many, many more in each market

FOOD THAT
NOURISHES

Maximising quality protein

Quality protein, from diverse sources to protect and build lean muscle

Full of fibre

Fibre that fills you up and feeds your microbiome, from wholefoods, not fortification

Rich in micronutrients

Micronutrients that your body can absorb easily, in natural forms

Healthier convenience

Nutritious food packaged in convenient formats, without sacrificing quality

INGREDIENTS
PEOPLE
CAN TRUST

Better Ingredients

Genomic testing and precision breeding to grow crops with more protein, fibre and micronutrients – and critically, more flavour

Better Growing

Reducing synthetic agrichemicals and intensive farming, and tracking how those changes affect an ingredient's food quality

Better Packaging

New technologies for maintaining shelf life and food safety

THE DIET AND
HEALTH
FEEDBACK
LOOP

Coaching

Diet advice and behavioural-change support that nudges you to eat better over time

Diagnostics

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Pulling together purchase, wearable, biomarker and health data to show how food choices shape your health

The Bramble Intelligence 40

The companies creating products, services, and infrastructure for “Tomorrow’s Appetites”

MAKING IT
EASY
TO EAT WELL

Inspiration



Nutrition Guidance



zomato

Fulfilment



British Brand showcase – globally there are many, many more in each market

FOOD THAT
NOURISHES

Maximising quality protein



Full of fibre



Bio & Me

PACK'D

Rich in micronutrients

NATOORA



Healthier convenience

FRIVE

STOCKED

INGREDIENTS
PEOPLE
CAN TRUST

Better Ingredients



Better Growing



Edacious



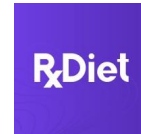
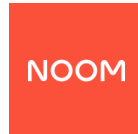
Better Packaging

KLURALABS



THE DIET AND
HEALTH
FEEDBACK
LOOP

Coaching



Diagnostics

ŌURA



Alba Health

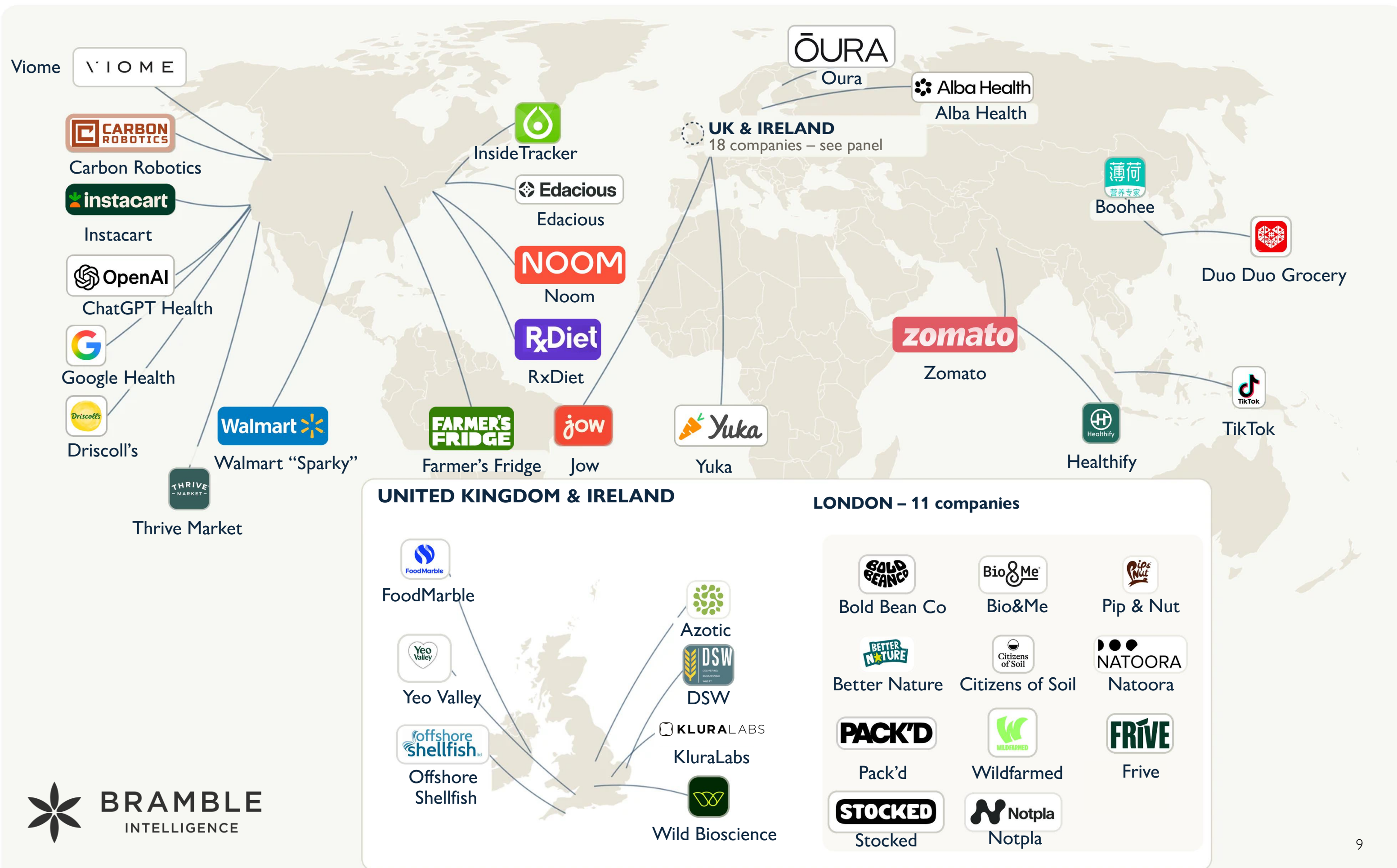
V I O M E

Data Integration

OpenAI



WHERE ARE THE BRAMBLE INTELLIGENCE 40 LOCATED?



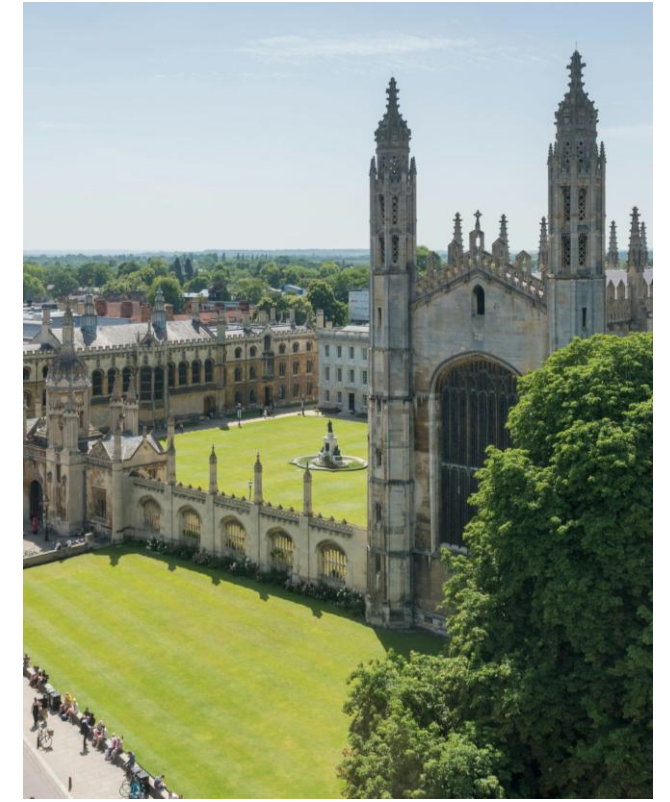
Change will look different by region

Change will look different around the world, because the starting conditions differ: food culture, diet-related disease, healthcare systems, and how easily innovation takes hold.

US: a major source of innovation, especially in services that *make it easy to eat well and close the loop between diet and health*. It leads in many technologies, from AI to biotech, and its online grocery market is mature – 15% of shopping happens online in the US, against 3% in Germany. The US also has the highest use of appetite-suppressing drugs. By June 2026, 15% of adults had taken them. Obesity and diet-related illness are more widespread in the US than in any other large economy.

UK: a fiercely competitive grocery market where own-label products are everywhere. That competition pushes brands to compete on what customers actually want. British science is strong in crop genetics and precision breeding.

We look to **Europe** for innovation built on regulatory science and standards. **China** builds technology into daily life more deeply than anywhere, so new ideas reach hundreds of millions fast. **India** has more than 100 million people with diabetes – but appetite-suppressing drugs went generic there in March, cutting prices by up to 80%.



MAKING IT EASY TO EAT WELL

Remove the barriers to healthier food choices with inspiration, practical advice and easy checkout.

This spans the entire **in-store and online shopper experience** including signage, range selection, merchandising, and marketing and promotions.

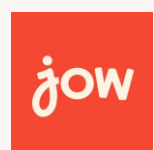
The **AI-enabled decision layer** is the biggest prize.

Whoever controls this layer shapes millions of diets – **both online and in-store**. This depends on **winning the trust of consumers** as a credible source of food quality information.



Inspiration

Recipes and plans that remove the stress from planning and prepping meals



“Sparky”

Nutrition Guidance

Simple nutrition scores and suggested swaps that make healthier choices easy



Boohee

zomato

“Healthy Mode”

Fulfilment

Making it fast and easy to buy quality, nutritious food



Duo Duo Grocery

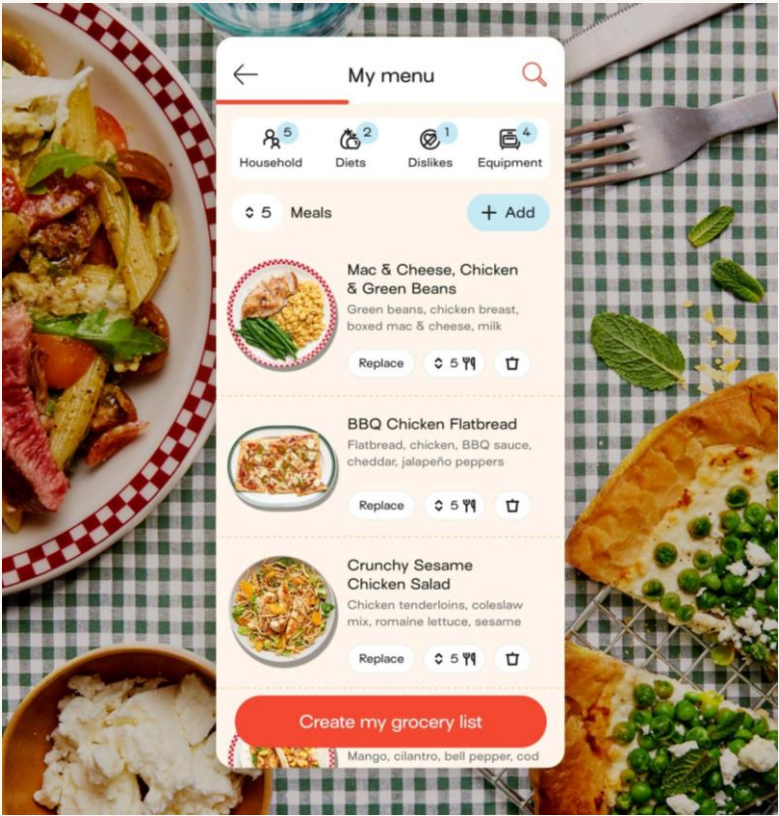




STARTED
2017

MARKET COVERAGE
France (HQ) & US

TRACTION
9M+ users



Turning food inspiration straight into a shopping basket makes scratch cooking cheaper and easier.

Jow creates personalised meal plans with simple recipes and does the grocery shopping for you.

Its shoppable recipes build a "Smart Cart" that makes up around 70% of what users buy; shoppers add household essentials for the rest. It is now aiming to make grocery shopping even easier with its AI agent, Jowzi, which builds a "magic list" based on your purchase history and does the whole shop for you.

DISTINCTIVENESS

- Personalised: 5,000+ recipes tailored to household size, appliances, and dietary needs
- Affordable: average meal cost of €2.60, saving users 10%, with 25% more fresh ingredients and 15% less waste
- Integrated: users link their supermarket account and saved card, so they can check out in one tap

MOMENTUM

- 9M+ users across France and the US, up from 7M+ last year; over 200M meals cooked via the app
- Connected to 10,000 stores across 10 retailer partners

WHAT'S NEXT

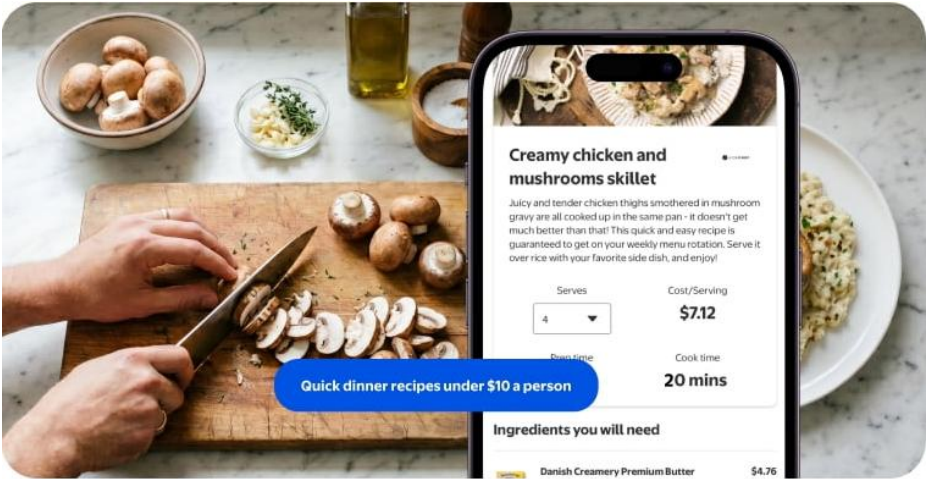
- "The first AI agent that does your grocery shopping for you, from prompt to plate."*
- Released Jowzi in June 2026 with ambitions to become the leading AI assistant that shops for you
- Jowzi aims to automate the full shop and creates "personalised shopping aisles" based on your household and enables family members to add to the shopping list via WhatsApp



STARTED
June 2025

MARKET COVERAGE
US (HQ)

TRACTION
Weekly users doubled
Feb-Apr '26



Retailers will use their customer relationship and data assets to build their own AI assistants. Walmart has shown real consumer demand and commercial impact for its agentic shopping assistant "Sparky".

Built into Walmart's app and walmart.com, Sparky turns a goal like "plan the week's dinners" into a ready-to-buy basket. Between February and April 2026 weekly users doubled and the number of items bought through it grew more than fourfold. Sparky users spend 35% more per order than non-users.

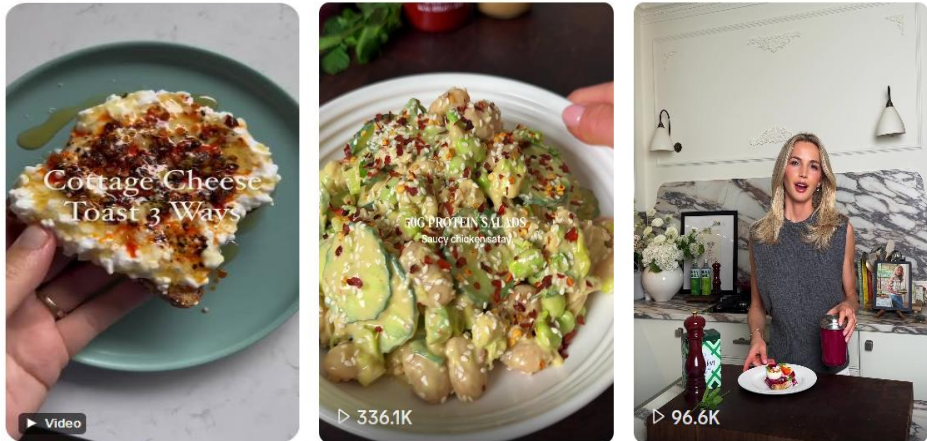
Walmart is investing in Sparky to keep customers on its own platform, after tests showed that shoppers were only a third as likely to buy on ChatGPT as on walmart.com.



STARTED
2016

MARKET COVERAGE
150+ markets (HQ: USA & Singapore)

TRACTION
1.5B+ monthly users; 30M+ UK



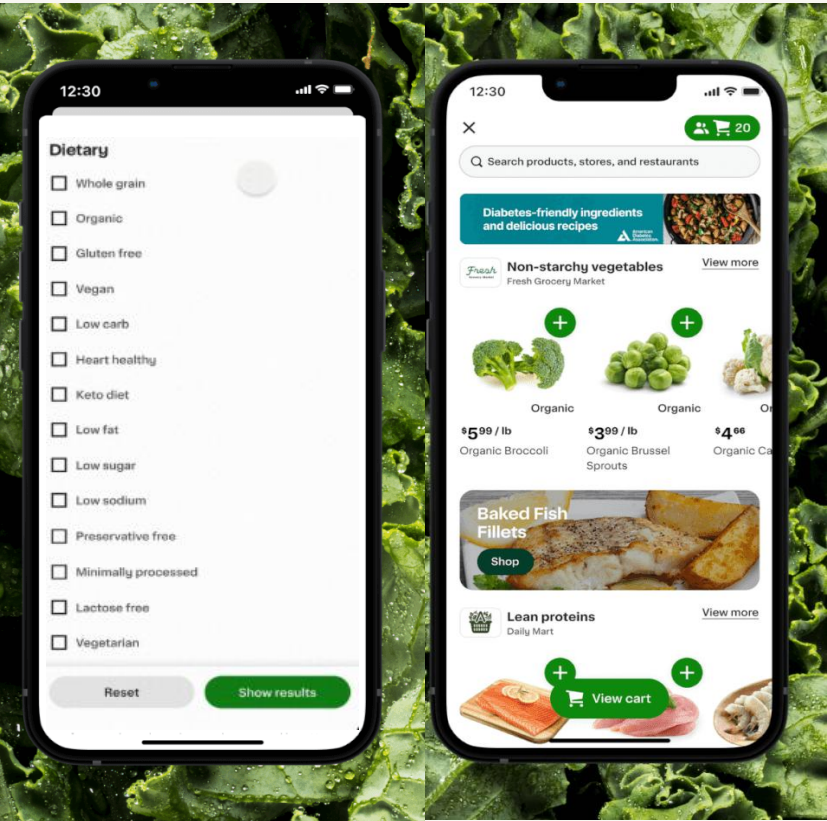
Social media is overtaking traditional sources of food inspiration and nutrition advice. TikTok now shapes what millions eat, for better and for worse. TikTok trends change what the nation buys, fast – it helped push UK cottage cheese sales up 54% in 2025.

Recipes are the most-searched topic on TikTok; 70% of UK Gen Z get food inspiration from social media, and 18 to 24s rank it ahead of NHS websites and doctors for nutrition information. This influence is not always positive: just 2% of TikTok nutrition videos match public health guidance.

12



STARTED	MARKET COVERAGE	TRACTION
2012	US (HQ) & Canada	Health tags cover 500K items across the platform



Trustworthy “eat well” guidance depends on structured product data. Whoever builds this at scale can shape baskets across retailers.

Instacart has built the deepest structured product data layer in US grocery.

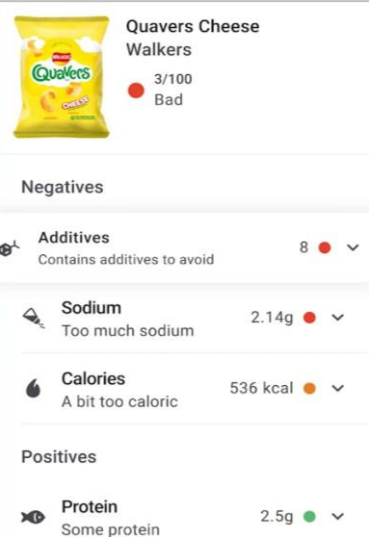
Its Catalog Engine, vision-language AI checked by humans, turns a messy 17M-item grocery catalogue into structured data with 1.3B data points tagged so far. Instacart uses it to power its own app, where Smart Shop tags products across 30 health attributes, from high fibre to minimally processed. It also opens it to third-party apps through its Developer Platform, and sells it to other retailers to run their own online storefronts.



Better nutrition scores help shoppers choose well – and teach them to expect more from brands.

Users scan a barcode, get a 0-100 score and a healthier swap. 94% of users put back products that have a red rating and more than 75% of French manufacturers say their Yuka score influences formulation. Since April 2026 Intermarché – which has reformulated 3,000+ recipes since 2017 – now also displays Yuka scores on its own online shop.

STARTED	MARKET COVERAGE	TRACTION
2016	France (HQ), US, UK + 12 countries	85M+ users



The strongest position in the decision layer is to own the nutrition data other tools rely on *and* the consumer relationship. Boohee has spent 17 years building both.

Boohee started consumer-first: Chinese dieters track their meals on its app, follow its nutrition plans and buy its own-brand healthy foods. The data it built along the way is now licensed to power nutrition features for Tencent and Huawei

STARTED	MARKET COVERAGE	TRACTION
2008	China (HQ)	Tens of millions of users



DISTINCTIVENESS

MOMENTUM

WHAT'S NEXT

- **Human-verified:** AI plus human checking makes the data reliable enough for health guidance, not just product search.
 - **Neutral supplier:** the only grocery player selling its data layer to competitors as readily as it uses it itself.
- **Third-party apps:** WeightWatchers, NYT Cooking and eMeals all use Instacart's catalog engine to power features within their own apps
 - **Other retailers:** 380+ retailers, including Aldi and Costco, run their own online stores on Instacart's platform
- **From marketplace to infrastructure:** the play is to become grocery's data layer, both in-store and online. Its "Carrot Tags" software already pushes the same product data onto electronic shelf labels in physical stores
 - **Instacart Health** extends the software into food-as-medicine programmes, where providers and insurers fund healthy baskets.



Nutrition nudges are not just for the supermarket. Zomato’s “Healthy Mode” puts a health filter on India's biggest takeaway app.

Each dish displays its AI-scored nutrition breakdown and you can set your own protein and carb targets. Orders of healthier dishes are up 20% since launch; a February protein challenge drew a million customers in two weeks. It is now extending into "Healthy Subscriptions", multi-day meal plans from partner restaurants.

STARTED	MARKET COVERAGE	TRACTION
Sept 2025	India (HQ)	10M+ orders via Healthy Mode since Sept 2025 launch





Duo Duo Grocery

STARTED	MARKET COVERAGE	TRACTION
2020	China (HQ)	~45M orders a day



The challenge is also to make fresh produce affordable for lower-income households.

Duo Duo Grocery does this by pooling orders directly from farms.

Shoppers in China order by late evening and collect from a local pickup point the next afternoon. It pools orders by neighbourhood and routes them direct from farms, stripping out middlemen and last-mile delivery costs, so daily essentials are cheaper than supermarkets. The same short chain keeps food fresher: it sources produce from nearby farms where possible, and the whole cycle from order to collection takes under a day.

DISTINCTIVENESS

- **Pooled demand:** thousands of neighbours' orders are combined overnight into one farm order and one drop, removing the two biggest costs in grocery: middlemen and the last mile.
- **Reach:** pickup points cover more than 70% of China's ~500,000 villages, places often beyond the reach of supermarkets.

MOMENTUM

- Sells tens of billions of dollars of groceries a year, in the same league as the UK's big four supermarkets
- The last major player standing in China's community group-buying market, after Taocaicai shut and Meituan Youxuan pulled back to two provinces in 2025
- Sources from 16M+ farmers across Pinduoduo's wider platform

WHAT'S NEXT

"We hope to become the largest grocer in the world."

- A \$1.4B agriculture initiative is deepening the farm-direct model, from seed-breeding competitions to rural logistics.
- Keeps densifying pickup coverage as rivals retreat, extending cheap fresh food further into lower-income and rural China.



Making it easy also means making good food physically closer to people. Farmer's Fridge has reimaged what a vending machine sells.

Smart fridges sell chef-made fresh meals, with full nutrition shown in its app, in offices, airports, hospitals and college campuses across the US: quality food in exactly where places people get hungry, where the alternative is snacks and pastries.

STARTED
2013
MARKET COVERAGE
US (HQ)
TRACTION
2,000+ locations



Eating well gets easier when the shop is edited for you, so every choice avoids harmful ingredients. Thrive Market has built an online membership grocer on that promise.

It restricts more than 1,000 ingredients from everything it sells and filters the range by diet, from gluten-free to GLP-1 friendly. More than 1.6M members pay an annual fee, Costco-style, in exchange for healthy food at lower prices.

STARTED
2014
MARKET COVERAGE
US (HQ)
TRACTION
1.6M+ members; \$700M+ sales (2024)



FOOD THAT NOURISHES

British brand showcase

As **nutrient quality per bite** becomes the unit of competition, people spending more time thinking about what to eat are literally “valuing” it more.

People need to eat **more healthy food to close nutritional gaps**. This goes beyond just reformulation.

There will be a **premium on delicious and nutritious food**. Innovation often starts at the upper end of the market and reaches the everyday consumer over time.

This is a British Brand showcase – globally, there are many, many more in each market, but we’re spotlighting the category-defining UK success stories.



Maximising quality protein

Quality protein, from diverse sources to protect and build lean muscle



Full of fibre

Fibre that fills you up and feeds your microbiome, from wholefoods, not fortification



Rich in micronutrients

Micronutrients that your body can absorb easily, in natural forms



Healthier convenience

Nutritious food packaged in convenient formats, without sacrificing quality





STARTED	LISTINGS	SALES	RANGE
1961 (organic brand 1994)	All major UK supermarkets	£425M (FY25, +17.6%)	Over 100 SKUs – yoghurt, kefir, milk, butter, ice cream, granola, beef

The best-quality dairy comes from working with nature, not against it.

Yeo Valley Organic, Britain’s biggest organic brand, is taking natural protein mainstream across the dairy aisle, from high-protein yoghurt to kefir, milk and butter

Dairy is complete protein as nature builds it: no isolates, no sweeteners, nothing artificial. The quality starts on the farm: free-range, pasture-fed herds kept to Soil Association standards. This results in higher levels of omega-3 in organic milk compared to conventional milk. It owns its supply, family-farmed in Somerset since 1961.

DISTINCTIVENESS

- **Natural by construction:** protein comes from straining organic milk, not isolates or sweeteners; its 12g-protein Greek Recipe pots carry “nothing artificial” on the label.
- **Farming first:** Yeo Valley pays a premium to its direct supplying dairy farmers to support the uptake of increasingly regenerative farming practices

MOMENTUM

- Purchased by over 10M UK households every year
- Acquired The Collective, one of the UK’s best-known yoghurt brands, in March 2025
- FY25 sales grew ~£64M, driven by volume increases

WHAT'S NEXT

“To grow the nation’s portions of natural healthy food through our branded products, as well as in our newest categories: meat and cereals”

- New capacity and automation investment targets further growth and a 5% margin



There will be a premium on delicious, nutritious food, and not only for a small set of affluent customers. Pip & Nut has taken a cleaner nut butter to the top of a mainstream category.

Made with simple ingredients and no palm oil at roughly three times the own-label price, it is the UK’s fastest-growing and number one nut-butter brand with a 17% share, sold in more than 5,000 UK stores.

STARTED	2013
LISTINGS	All major UK supermarkets
SALES	£26.4M (2025, +51% YoY)
RANGE	40+ SKUs – nut butters, nut-butter cups, oat & protein bars



Alternative protein does not have to mean ultra-processed. Better Nature has shown a whole-bean fermented protein can win mainstream listings.

Tempeh is a whole food with ~22g of complete protein per 100g plus the fibre meat lacks; UK shoppers now spend £65M+ a year on tofu and tempeh. Better Nature has played an instrumental role in taking tempeh from health-shop niche to supermarket shelves, as the UK’s highest-rated tempeh brand. German units are up 67% so far this year, and its repeat rate in Tesco has reached 35%, well above the category average.

STARTED	2018
LISTINGS	Tesco, Asda, Ocado
SALES	£3M (ARR July 2026, +50% YoY)
RANGE	4 tempeh SKUs





STARTED	LISTINGS	SALES	RANGE
2021	All major UK supermarkets	£11.7M (2025, +72% YoY)	15 SKUs from jarred “Queen” butter beans to gourmet baked beans



The way to close the fibre gap is to make people want to eat more naturally fibre-rich wholefoods, not just to reformulate.

Bold Bean Co has used community and recipe content to create new demand for beans.

It built the audience before the product: ‘beanspo’ recipes on Instagram grew into a community that started cooking with beans. The product is simple: expertly sourced beans, slow-cooked with nothing but salt, good enough to eat straight from the jar. It is the brand behind the “fancy beans” shelf every supermarket suddenly has.

DISTINCTIVENESS

- **Community-led:** it ran “beanspo” on Instagram before it had anything to sell, and now owns the world’s largest bean recipe platform: 5M website visits a year and two Sunday Times bestselling cookbooks, with two more commissioned
- **Gateway effect:** 1 in 3 of its customers are new to canned pulses, and over 80% of its sales are incremental to the category, recruiting new bean-eaters rather than switchers

MOMENTUM

- The fastest-growing and now largest brand in canned pulses: it added £7.1M to the category over the last year – over two-thirds of category growth across the major retailers
- The No.1 sales-per-store SKU in the category across Waitrose, Sainsbury’s, Tesco and Ocado

WHAT’S NEXT

- “On a mission to make you obsessed with beans, by giving you the best of beans.”*
- From the jar outward: the UK’s first gourmet baked bean extends the brand beyond its chickpea-and-butter-bean core, and the entire core range holds a Great Taste Award
 - Launched in the Netherlands this year and Australia by November; the ambition is a UK household brand by 2030



Health in food is no longer just about avoiding the bad; people now shop for positive benefits. Bio&Me has built a multi-category breakfast range around the benefits of gut health.

Breakfast is a crowded aisle, but Bio&Me has cut through. Co-founded by registered dietitian Dr Megan Rossi and Jon Walsh, the brand sells gut-friendly granola, muesli, porridge and live kefir in every major UK supermarket: more than 38,000 outlets.

STARTED
2019
LISTINGS
Major UK supermarkets
SALES
£15.9M (2025, +50% YoY)
RANGE
36 SKUs across 6 ranges – granola, porridge, muesli, overnight oats, bars, kefir



Fruit and vegetables are a natural source of fibre, but short shelf lives put people off buying more. PACK'D has won mainstream listings for a no-planning, no-waste frozen format.

The freezer is an underrated route to five-a-day: PACK'D has created a brand for frozen fruit and veg that need no planning and create no waste, and has earned listings in Tesco, Sainsbury’s and Ocado alongside its direct-to-consumer store.

STARTED
2014
LISTINGS
Tesco, Sainsbury’s, Ocado + DTC
SALES
£7.1M (2025, +58% YoY)
RANGE
Organic frozen fruit, organic frozen veg





Fruit and vegetables grown in season, for flavour rather than shelf life, carry more micronutrients too. Natoora has built a supply chain and consumer brand on that principle.

Natoora sources fruit and vegetables from a direct network of over 600 independent growers, selecting varieties for flavour and quality. Natoora has built a transparent ecosystem of farmers that remains highly localised as it scales. It primarily supplies restaurants across six cities including Paris, New York, and Melbourne, alongside its own shops and mainstream retailers like Ocado and Waitrose.

STARTED
2004

LISTINGS
Ocado, Waitrose + own shops and DTC; 800+ UK restaurants

SALES
£64M
(2025, +9% YoY)

RANGE
Seasonal produce from 600+ growers



Convenience does not have to compromise quality. Frive has proven consumer demand for a better ready meal.

Customers order their meals for the week and everything arrives fresh, not frozen like most delivered meals – and already cooked, unlike a meal kit. Chef-made and designed by nutritionists, the meals contain none of the additives found in many supermarket ready meals. Frive now ships over 170,000 meals a week, and got there without outside funding

STARTED
2016

LISTINGS
Direct-to-consumer only (no retail)

SALES
~£50M
(ARR, mid-2025)

RANGE
40+ dishes on a weekly rotating menu, breakfast to dinner



Knowing where food comes from, and building close supplier relationships, helps brands control the quality of what goes in. Citizens of Soil's direct relationship with growers means faster pressing and quicker time to market, which raises polyphenols.

Its single-origin extra-virgin olive oils come from regenerative farms around the Mediterranean, with producers paid above market rate. Its Olive Oil Club is made up of 20,000+ DTC members, and they have pioneered a Health Club that delivers its highest-polyphenol early-harvest oils. Their products are now also carried by major UK grocers.

STARTED
2020

LISTINGS
Waitrose, Ocado

SALES
£2.6M
(2025, +128% YoY)

RANGE
Rotating single-origin EVOOs (12+/yr)



The freezer can hold high-quality food and removes the need for preservatives. Stocked's chef-cooked, additive-free meal blocks are a genuinely new format.

Chef-cooked dishes frozen into small blocks you portion to your appetite and household size, with no additives: 2 million meals sold to date. Providing flexibility and convenience.

STARTED
2020

LISTINGS
Ocado, Waitrose + DTC

SALES
£11M
(ARR, +150% DTC, +380% retail)

RANGE
30 SKUs (Chicken Tinga to Beef Chilli)



INGREDIENTS PEOPLE CAN TRUST

Trust is **the** prized asset across the value chain, as food quality becomes the basis for consumer loyalty to brands and retailers.

Innovation now spans **every stage of the value chain** before food reaches a shelf: genetics, growing, processing and packaging. It is business-to-business, largely invisible to shoppers, but it shapes everything they eat.

The companies here are **behind a bigger shift**: moving food production towards **more resilient farming** that works with and protects nature, and developing **better alternatives** for processed food.



Better Ingredients

Genomic testing and precision breeding to grow crops with more protein, fibre and micronutrients – and critically, more flavour



Wild
Bioscience

Better Growing

Reducing synthetic agrichemicals and intensive farming, and tracking how those changes affect an ingredient's food quality



Azotic
Technologies



Better Packaging

New technologies for maintaining shelf life and food safety





Better flavours change what people eat: crops can be bred for taste and nutrition, not just shelf life. Driscoll's has been improving berry flavours for over a century.

Driscoll's owns no farms. Its asset is berry genetics and puts its money into breeding. As an example, across 35 test plots, sensory scientists trial 210 raspberry varieties to find the ~2 worth launching. The latest, the sweeter Reyna (2023), is already its global standard, sold at a premium as "Sweetest Batch". Driscoll's is now America's second-highest-earning supermarket brand, after Coca-Cola.



STARTED
1904

MARKET COVERAGE
Sold in ~60 countries
(HQ: USA)

TRACTION
~\$7B annual sales



As climate volatility turns sourcing into a strategic problem, staples that yield more on the same land and water become a way to build resilience into the food supply. Wild Bioscience is posting double-digit yield gains in wheat and soy.

The Oxford University spin-out mines the genetics of wild plants for traits that boost a crop's own photosynthesis and resilience, then activates them without adding genes from other species. Its \$60M Series A, led by Larry Ellison's Ellison Institute, is funding the push to market, and it now leads a UK consortium with seed giant KWS and Dyson Farming to bring precision-bred wheat to commercial scale.



STARTED
2021

MARKET COVERAGE
UK (HQ); trials in US,
Brazil & Argentina

TRACTION
Soybean partnership with
GDM, LatAm's soy-
genetics leader



The fastest way to improve a nation's diet is to upgrade its staples, so people eat better without changing what they buy. The "Delivering Sustainable Wheat" programme has roughly doubled the fibre in white wheat.

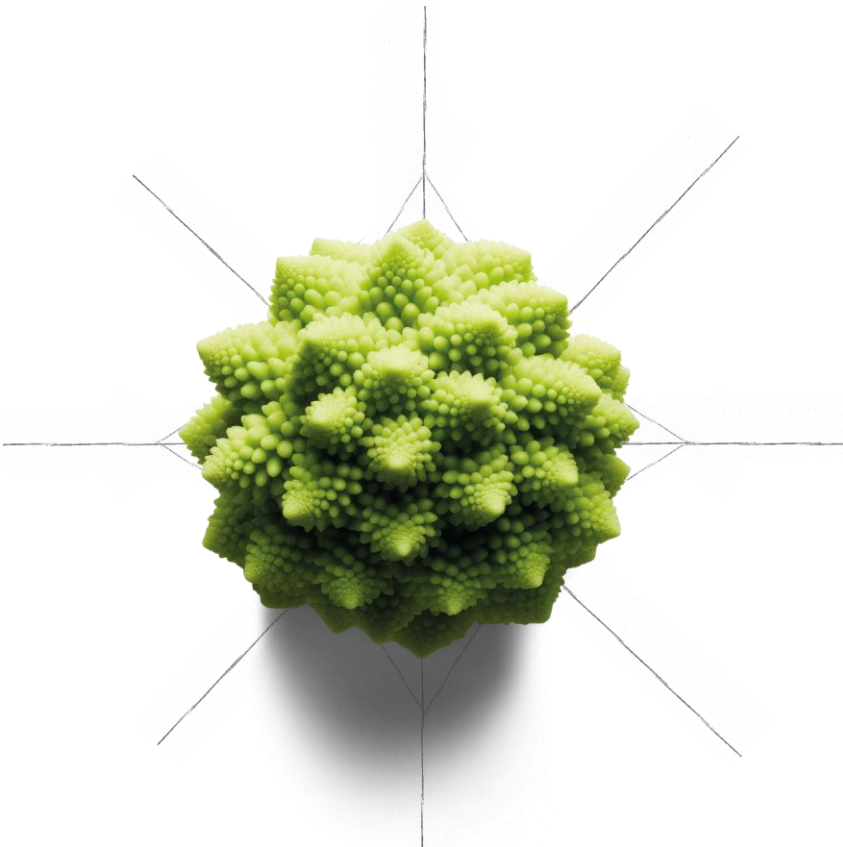
The programme, funded by the UK government's bioscience research council (BBSRC) and led by the John Innes Centre with Rothamsted, Quadram and Earlham, breeds better wheat. Its standout result is a wheat with much more fibre and no taste trade-off in baking tests. It now needs food companies to adopt it, so the extra fibre reaches the bread people already buy and closes the fibre gap.



STARTED
2023

MARKET COVERAGE
UK (HQ)

TRACTION
High-fibre white wheat
~2x fibre; ~2g per slice



WILDFARMED

STARTED
2018

MARKET COVERAGE
UK (HQ) & Europe

TRACTION
1,000+ business customers; retail range available in Waitrose, Tesco and Ocado



How a crop is grown increasingly shapes how consumers judge quality. Wildfarmed has taken its regeneratively farmed wheat, oats and barley into scaled supply chains with a brand that heroes nature and farming.

Wildfarmed pays its network of British growers a premium for growing wheat, oats and barley using regenerative practices, in recognition of their farming practices that bring nature back into food-producing fields.

Wildfarmed ingredients are used by a wide range of food businesses from micro-bakers to Michelin-starred kitchens and major supermarkets.

DISTINCTIVENESS

- **Measured outcomes:** Farmers earn a premium for growing in accordance with Wildfarmed regenerative guidelines. These focus on improving soil health, increasing biodiversity, minimising water pollution, and reducing carbon
- Wildfarmed works with a range of research partners to analyse in-field data and demonstrate what its farming practices are actually delivering

MOMENTUM

- From June 2026, 51% of the wheat in every KitKat wafer made at Nestlé's York factory is Wildfarmed regenerative wheat.
- From July 2026, all homemade cakes and bakes in National Trust cafés are made with 100% Wildfarmed regenerative flour and oats.
- In June 2026, Wildfarmed launched its first packaged sliced sourdough in Waitrose and Tesco.

WHAT'S NEXT

"We are on a mission to get better food, from better farms on to the high street."

- Accelerating the transition to regenerative agriculture across a range of arable crops

Azotic Technologies

With fertiliser prices spiking and sourcing now a strategic risk, cutting farming's dependence on synthetic nitrogen at source builds resilience. Azotic lets ordinary crops draw their own nitrogen from the air.

Its product is a natural bacterium, applied to seeds or leaves, that lets any crop pull nitrogen from the air the way legumes do, cutting the need for synthetic fertiliser. It is now in commercial use on row crops and registered in 20+ countries.

STARTED
2012

MARKET COVERAGE
UK (HQ), Europe, US, Canada

TRACTION
1.4M hectares using Envita



CARBON
ROBOTICS

As regulators and consumers scrutinise glyphosate and other agrichemicals, companies can cut that chemical load by taking herbicide out of weed control altogether. Carbon Robotics kills weeds with AI-guided lasers instead.

Its LaserWeeder uses AI vision and lasers to destroy weeds with sub-millimetre precision and no herbicide, working on farms across the US and 14 countries; it has removed the need for more than 100,000 gallons of chemicals across 230,000+ acres.

STARTED
2018

MARKET COVERAGE
US (HQ) + 14 countries

TRACTION
230,000+ acres laser-weeded





Some of the most nutritious protein can be farmed with almost none of the inputs intensive agriculture relies on. Offshore Shellfish grows mussels that need no feed, fertiliser or fresh water.

The UK's first large-scale offshore mussel farm, rope-grown and ASC-certified, is already harvesting about 2,000 tonnes a year and scaling toward 10,000, a working blueprint for low-input protein at scale.

STARTED
2013

MARKET COVERAGE
UK (HQ); exports to Europe

TRACTION
Producing ~2,000 t/yr



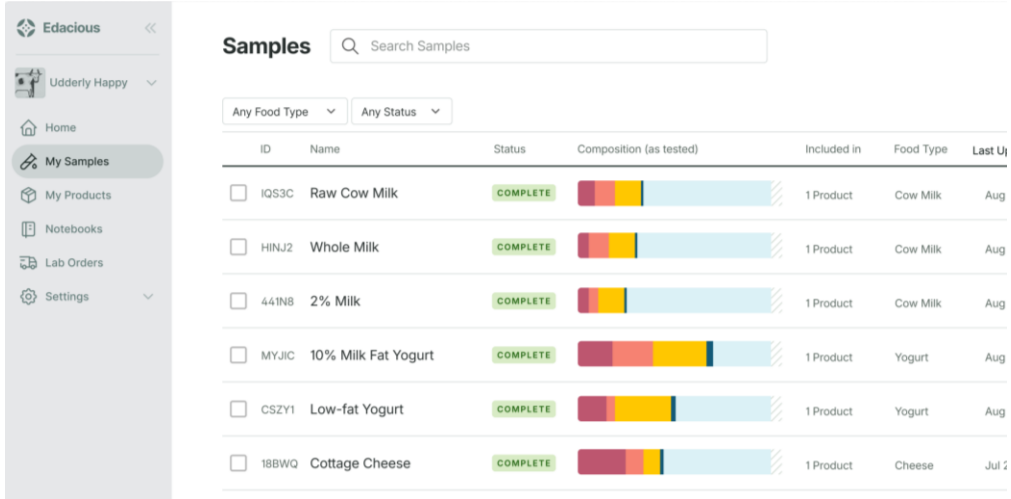
If nutrient quality becomes the basis of competition, it has to be proven, not just claimed. Edacious puts verified numbers behind what brands and producers say about their food.

Through accredited lab testing, Edacious verifies nutrient quality, then benchmarks results against reference data and industry comparisons. These comparisons also show early signals that better farming may drive better quality food. The verified data turns a claim into proof that a retailer or consumer can trust.

STARTED
2022

MARKET COVERAGE
US (HQ); expanding into the UK

TRACTION
More than 700 products tested to date



As trust widens to cover how food is made, keeping fresh food safe for longer without adding chemical preservatives becomes a quality signal in its own right. KluraLabs builds the preservation into the packaging, not the food.

Klura puts well-understood preservatives into the packaging rather than the food, a new form of modified-atmosphere packaging drawing on antimicrobial technology first built for hospitals. Today it does this at scale on grapes, protecting hundreds of thousands of packs a week, and it is now extending from fruit into bread and processed meats.

STARTED
2020

MARKET COVERAGE
UK (HQ) live; Europe, US & Canada in trials

TRACTION
350,000 units/week with a major UK grocer, up 7x in ten weeks



Trust in how food is made is extending to what it is wrapped in, as scrutiny of plastic and microplastics grows. Notpla strips the plastic lining out of takeaway packaging and replaces it with a coating made from seaweed.

Its home-compostable boxes reach eaters through the caterer Compass, distributor Bunzl, delivery platform Just Eat, and venues from IKEA's city stores to Wimbledon's strawberries and cream. The coating contains none of the PFAS "forever chemicals" or plastic lining that can leach into hot food and build up in our bodies. It is the first coating recognised as truly plastic-free under EU rules. It aims to supply it to converters and paper mills to become "the Gore-Tex of sustainable packaging".

STARTED
2014

MARKET COVERAGE
UK (HQ) + 10 European countries; early US

TRACTION
Nearly 50M plastic items replaced



CREATING THE DIET AND HEALTH FEEDBACK LOOP

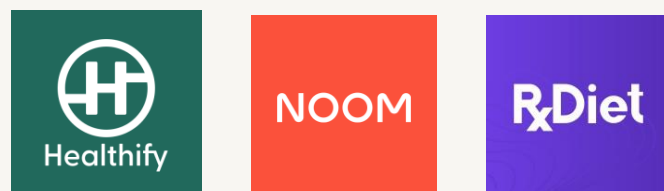
Diagnostic tools that link to diet create a feedback loop: people see positive results from what they are already doing, which makes new habits easier to keep. As costs fall and the tools get simpler, more people can take them up.

The **science here is still emerging**, and we need more studies before it's confirmed how accurate and reproducible the results are. Analysis of large-scale use will help. Even so, the data these early tools collect will shape future health and nutrition advice.



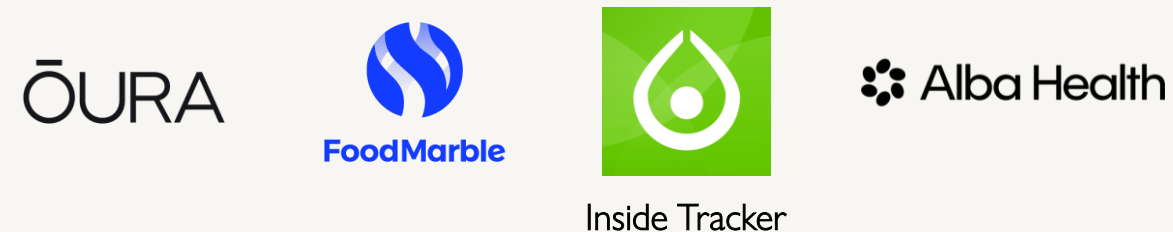
Coaching

Diet advice and behavioural-change support that nudges you to eat better over time



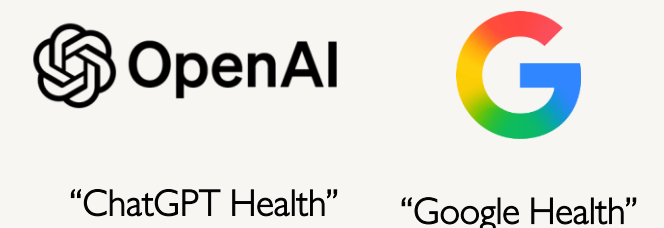
Diagnostics

Wearables, at-home biomarker tests and subscriptions that measure how your body uses nutrition, and what else it needs



Data Integration

Pulling together purchase, wearable, biomarker and health data to show how food choices shape your health

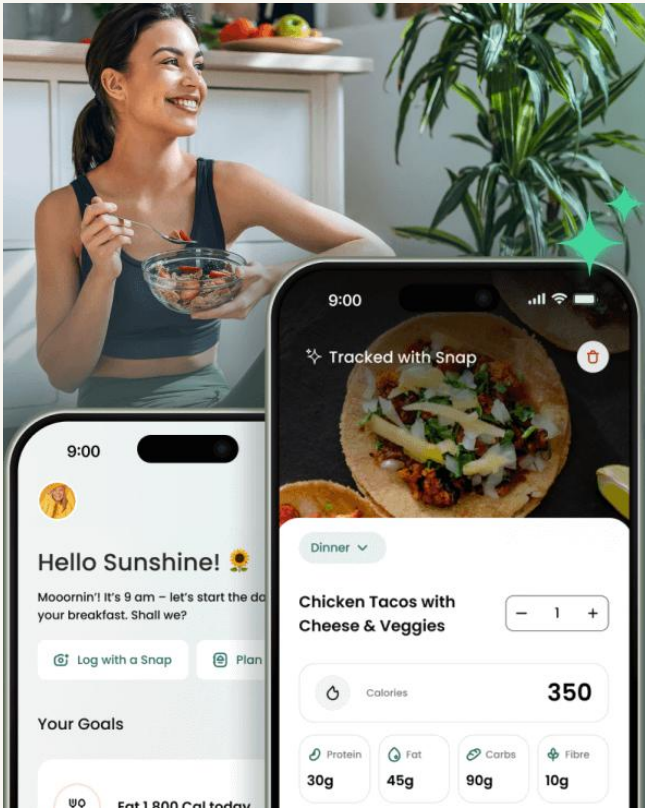




STARTED
2012

MARKET COVERAGE
India (HQ) + SE Asia; US

TRACTION
~45M registered users



Diet coaching sticks when everything sits in one place: your food diary, your body's readings, your coach and your medication.

Healthify has built all of it into one of India's largest health apps.

Healthify combines food and glucose tracking, connected scales, an AI coach (Ria) and 600+ human coaches in one platform. As GLP-1 drugs reach India, it has built a companion programme around them, handling prescriptions, monitoring and the diet changes that make the drugs work.

DISTINCTIVENESS

- Made for Indian plates: global apps like MyFitnessPal never localised and so stumbled over Indian dishes. Healthify's India-first food database and coaching are built around Indian cuisines and languages
- Doctors in the app: its own clinicians assess and prescribe, with medication supplied through a Tata 1mg partnership, and its AI coach Ria now handles check-ins by real-time voice (Dec 2025)

MOMENTUM

- India operations profitable in FY24 on ~\$20M revenue, across 300+ cities
- GLP-1 support is its fastest-growing line, expected to reach a third of paid subscriptions within a year

WHAT'S NEXT

- “Putting a high-acuity health coach in every person’s pocket.”
- Entering the US, the world’s biggest GLP-1 market, with \$45M raised in 2024 to fund the move
- The ambition is to be the patient-support layer for every GLP-1 maker – India alone presents a large addressable market with 100M+ diabetics.



Information is not the only barrier to changing diets; behavioural psychology matters too. Noom built one of the biggest behaviour-change businesses in health on that insight.

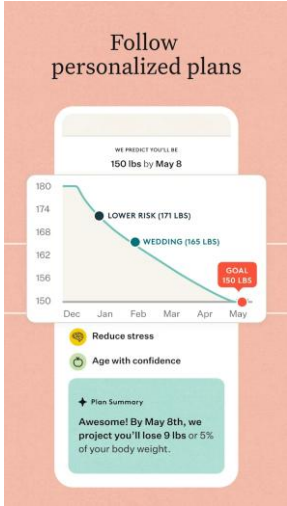
Noom's daily lessons use cognitive behavioural therapy and a colour-coded system to change habits rather than count calories – an approach backed by 40+ peer-reviewed studies and the CDC's highest recognition for diabetes prevention. It now wraps that coaching around medication: its medical arm prescribes GLP-1s, an AI body scan tracks muscle loss on the drugs, and employers buy the package to control drug spend, with the first employer on its SmartRx programme on track to cut GLP-1 costs by nearly 80%.

STARTED
2008

MARKET COVERAGE
US (HQ, primary)

TRACTION
Medication arm reached a \$100M run-rate within 4 months of launch (2024)

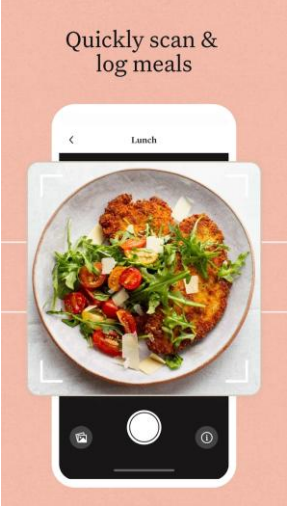
Follow personalized plans



Psychology-backed lessons



Quickly scan & log meals





Diet advice only counts when it changes what people actually eat. RxDiet delivers food as medicine: meal plans and groceries tailored to patients with chronic illnesses.

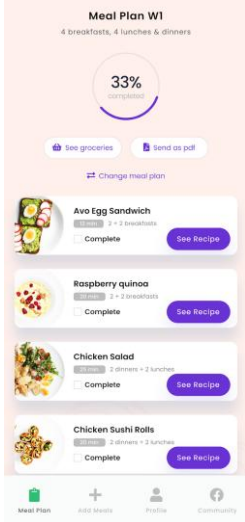
RxDiet uses AI to build meal plans for chronic conditions such as diabetes and kidney disease, tailored to what each patient actually likes eating. Its retail partners then deliver the week's groceries to the patient's door, and insurers pick up the bill.

STARTED
2018

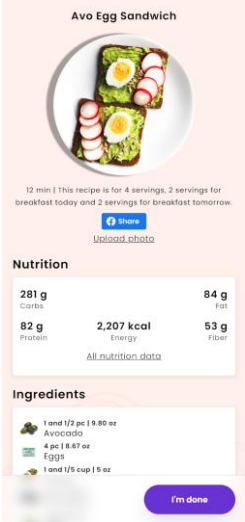
MARKET COVERAGE
US (HQ)

TRACTION
Covered by 2 of the 3 largest US insurers

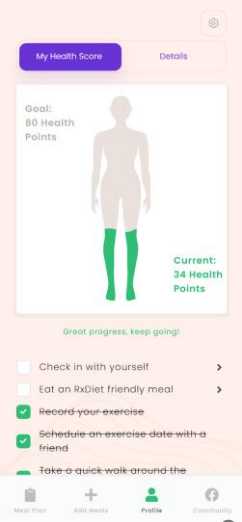
Meal Plan W1



Avo Egg Sandwich



My Health Score





Inside Tracker

A blood test becomes useful when it tells you what to eat, then proves the change worked. InsideTracker has been closing that loop longer than anyone.

It turns a panel of up to 48 blood biomarkers into a specific set of foods to eat, its “Food Basket”, then re-tests to show whether the flagged markers actually moved. A competitor – Function Health – is another sign of how fast at-home blood testing is growing, with 200,000+ members for its 160-test panel.

STARTED
2009

MARKET COVERAGE
US (HQ)

TRACTION
100,000+ customers; up to 80% improve at least one flagged marker



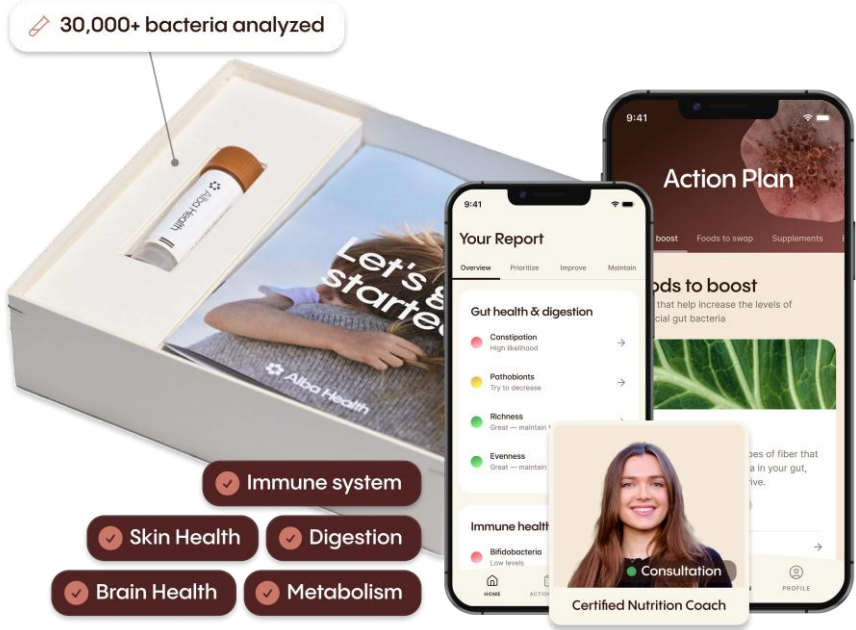
The feedback loop matters earliest in childhood, when the gut and eating habits are still forming, yet almost all at-home diagnostics target adults. Alba Health takes it to families.

Co-founded by a leading microbiome scientist, Alba Health offers at-home gut-microbiome testing for children aged 0 to 12, turning what it finds in a child's gut into practical nutrition guidance for parents. It is early, but has been growing fast.

STARTED
2022

MARKET COVERAGE
Sweden (HQ), UK & Europe

TRACTION
~20% MoM growth for 13 months running



The next job for wearables is connecting what you eat to how your body responds. Oura got there first at scale, taking the category's best-known ring beyond activity tracking.

In 2025 it added Meals and Glucose alongside Sleep and Recovery, so the smart ring can read how the body responds to food, in a device already in mainstream use rather than a pilot.

STARTED
2013

MARKET COVERAGE
150+ countries (HQ: Finland)

TRACTION
~5M paid members



FoodMarble

At-home diagnostics only scale when they are low effort. FoodMarble reads gut health from a pocket breath device.

Its handheld device measures the hydrogen and methane your gut produces as it ferments food. That does two related but separate jobs: screening for SIBO, a bacterial overgrowth in the small intestine, and pinpointing specific food intolerances such as lactose or fructose.

STARTED
2016

MARKET COVERAGE
Ireland (HQ), US, UK and across Europe

TRACTION
~£4M revenue (2025)



The prize in personalised nutrition is data: the more of it you hold, the better your advice gets. Viome reads the gut microbiome with RNA sequencing and has built a dataset of over a million samples

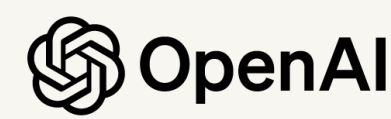
The results sort foods into four personalised lists - Superfoods, Enjoy, Minimise and Avoid - with tailored supplement and probiotic recommendations. Viome is now extending the same technology into clinical diagnostics, including an early-detection saliva test for mouth and throat cancer

STARTED
2016

MARKET COVERAGE
US (HQ), Canada, UK, Australia, Europe

TRACTION
1M samples analysed; \$200M raised





STARTED

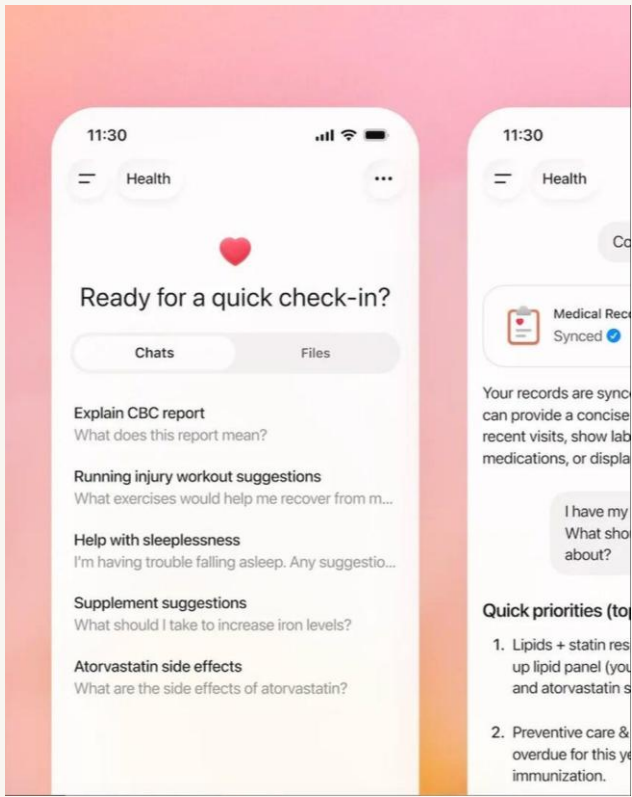
Jan 2026

MARKET COVERAGE

US (HQ) + most non-European markets

TRACTION

900M+ weekly ChatGPT users



The most valuable dataset in food will belong to whoever links food, biomarkers and medical records to outcomes in one place, and reaches all the way to the basket.

ChatGPT Health folds the whole chain into a single conversation.

Built with input from 260+ doctors, it connects medical records through b.well's network of 2.2 million US healthcare providers, plus Apple Health and apps like Function and MyFitnessPal, and answers in that context: blood results become a meal plan, and the Instacart integration turns the plan into a filled basket in the same conversation.

DISTINCTIVENESS

- End to end in one chat: records, biomarkers and food logs connect, so a blood result becomes a meal plan and a basket without leaving the conversation
- Physician-built: 260+ doctors from 60 countries scored its answers 600,000+ times, training it to admit what it doesn't know

MOMENTUM

- The demand came before the product: 230M+ people already ask ChatGPT health questions every week

WHAT'S NEXT

- Deeper actions: from explaining results to booking, reordering and tracking – the assistant doing, not just advising
- UK and Europe when compliance allows; the real race, with Google and Perplexity, is to own the food-and-health data layer



The data linking diet to health outcomes is hard to assemble from scratch. Google arrives with the pieces already in hand.

From May 2026 Google Health replaced the Fitbit app, moving tens of millions of users onto a new app whose Gemini-built coach joins wearable, sleep and medical data with food: snap a photo of a meal and it answers with plans and insights, like how late-night eating hits your sleep. In February, Apple shelved the standalone AI health coach it had been working on; among the big tech companies, Google is in the lead.

STARTED

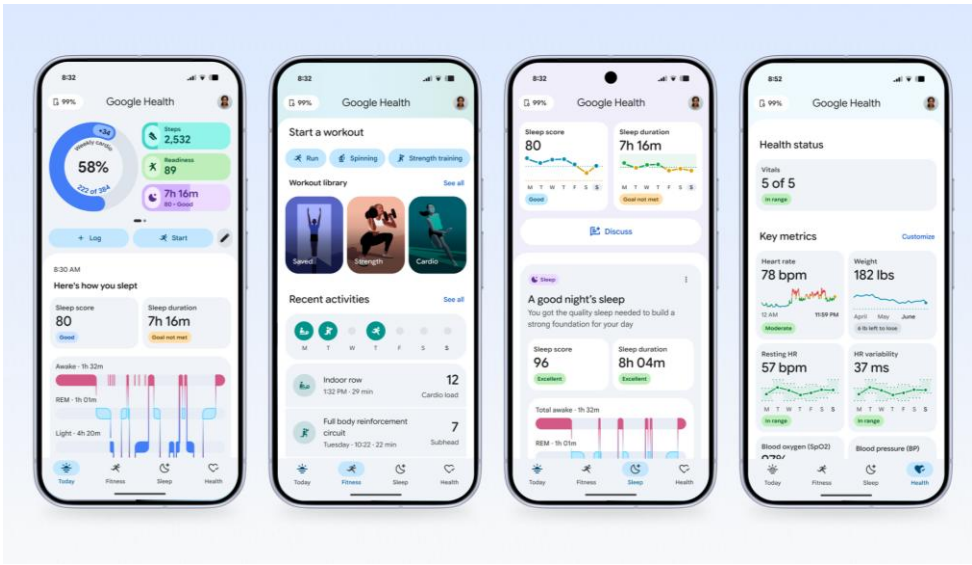
May 2026

MARKET COVERAGE

Global, replacing the Fitbit app (HQ: USA)

TRACTION

Fitbit's installed base migrating in



Between January and May 2026, all of the largest AI labs – OpenAI, Anthropic, Microsoft, Perplexity and Google – launched consumer health products.

Who the customer trusts to make these recommendations will determine where the profits move.

Advertising-funded AI risks losing that trust; subscription-funded AI keeps it but reaches fewer people.

Beyond the Bramble Intelligence 40



MAKING IT EASY TO EAT WELL

[Fitia](#) – a nutrition app that creates personalised meal plans and lets people log meals by photo, voice or text; 10M+ users and a nutritionist-checked food database.

[Ollie](#) – an AI meal planner that learns a family’s tastes and schedule, plans the week and sends the shopping list to Instacart, Walmart or Amazon Fresh; used by 75,000+ families and backed by Khosla Ventures and AI2.

[Ocado Shoppable Recipes](#) – turns Ocado’s own and selected partner recipes into a ready-made basket by adding the matched ingredients in one step.

[Mealime](#) – creates weekly meal plans and matching shopping lists around quick, healthy recipes; 5M+ downloads and acquired by Albertsons in 2022.

[FoodHealth Company](#) – scores groceries from 1 to 100 and suggests healthier alternatives, including guidance for people taking GLP-1 weight-loss medicines; integrated into Kroger and Hy-Vee’s online shopping tools.

[Innit](#) – provides product data and software that power nutrition scores, personalised meal planning and shoppable recipes; covers 2M+ products and powers Carrefour’s personalised nutrition score.

[Wylde Market](#) – an online farmers’ market that delivers food from small, regenerative and artisan producers across the UK; more than 80% of sales come from outside the M25.

[La Fourche](#) – a French online organic supermarket where members pay a yearly fee for lower-priced groceries; 160,000+ members and €100M of revenue in 2025.

[Kisan Konnect](#) – connects farms with homes and shops in Mumbai and Pune, delivering produce and dairy with farm-level traceability; links 5,000+ farmer families with 250,000+ customer families.

FOOD THAT NOURISHES

[Tiba Tempeh](#) – makes whole-bean tempeh blocks, marinated pieces, mince and protein bites; stocked by Sainsbury’s, Morrisons, Ocado and Planet Organic.

[Sea Sisters](#) – cans British fish and shellfish by hand in small batches; England’s first fish cannery since the 1940s, creating 15 local jobs.

[Simplicity Foods](#) – makes burgers, sausages and cooking ingredients from slow-fermented vegetables; used in 1,000+ professional kitchens and sold through Waitrose, Ocado and Abel & Cole.

[BrocStar](#) – turns patented broccoli bred to produce more sulforaphane in the body into soup, powder and snacks; its just-add-water SuperSoup is designed to be eaten once a week.

[Isle of Wight Tomatoes](#) – grows tomatoes chosen for flavour rather than shelf life; more than 40 varieties are grown each year and about 200 more are trialled, with products sold through M&S and Ocado.

[Field Doctor](#) – makes chef-cooked frozen meals designed by dietitians for needs such as IBS, heart health and menopause; launched the UK’s first Monash-certified low-FODMAP ready meals.

[Lune & Wild](#) – makes chef-cooked frozen meals for babies and young children; sold 1M+ meals in the past year; more than doubled revenue year on year and raised £2M in 2026.

[Deliciously Ella](#) – makes plant-based snack bars, cereals, granola and crackers; 100M+ products sold, stocked by major UK supermarkets and acquired by Hero Group in 2024.

INGREDIENTS PEOPLE CAN TRUST

[Brightseed](#) – uses AI to find compounds in plants that may support health and turns them into food and supplement ingredients; its platform analyses 11M+ natural compounds and it has launched ingredients for gut and metabolic health.

[Bloom Fresh](#) – breeds new grape, cherry and blueberry varieties for flavour, yield and resilience, then licenses them to growers; 2,000+ growers, 74,000+ hectares and 100+ patented varieties.

[Holobiome](#) – studies human gut bacteria to predict how foods and ingredients may affect health; uses profiles from 90,000+ people and a reference database of 2M+ gut bacterial genomes, with partners including Unilever and Ingredion.

[PulseON Foods](#) – makes pulse flour in a way that keeps plant cell walls intact and slows starch digestion; bread made with it produced about a 40% lower blood-glucose response in a human study.

[Biographica](#) – uses AI to identify plant genes linked to useful crop traits, helping breeders develop improved varieties faster; raised £7M and works with BASF Nunhems and other seed companies.

[Oobli](#) – uses fermentation to make sweet proteins that give food and drink sweetness with very little sugar; three have received FDA letters raising no questions about their safety.

[Aardaia](#) – uses genomics and faster conventional breeding to turn promising wild plants into farm-ready crops without genetic modification; raised a €5M seed round in 2026.

[Ecorobotix](#) – makes camera-guided sprayers that treat individual plants instead of whole fields; cuts crop-treatment chemical use by up to 95%, with 1,000 machines sold across 30+ countries.

[NewLeaf Symbiotics](#) – makes seed and crop treatments from naturally occurring plant microbes to support growth and crop protection; used on 8.5M+ acres in 2025, up from about 0.8M acres in 2022.

[RootWave](#) – makes tractor-mounted machines that kill weeds down to the root with electricity instead of herbicide; commercially available for orchards, vineyards and bush fruit.

[Earth Rover](#) – builds autonomous robots that map crops and kill weeds with concentrated light instead of chemicals; sold eight commercial systems and raised £2.8M.

[Apha Bio](#) – screens microbes to develop biological alternatives to synthetic fertilisers and pesticides; began a bioinsecticide partnership with Bayer in 2026.

[TRIC Robotics](#) – runs autonomous robots through strawberry fields at night, using UV-C light and vacuum systems to control mildew and pests while reducing chemical sprays; raised \$5.5M and operates across hundreds of acres in California.

[Nibblr](#) – software that helps food teams build recipes, calculate nutrition, check regulations and create labels in one place; its database contains 17,100 ingredients and it has completed 15,450 claim checks.

CREATING THE DIET & HEALTH FEEDBACK LOOP

[Nutrium](#) – software for nutrition professionals to create meal plans, hold online appointments and track patients; connects patients with a network of 350,000+ registered dietitians across 90+ countries and raised \$12M in 2025.

[Twin Health](#) – builds a daily digital model of each person’s metabolism from a glucose monitor, smartwatch, scales and blood-pressure cuff, then gives food and lifestyle guidance; raised \$53M in 2025.

[Nourish](#) – connects US patients with registered dietitians by video and bills their health insurance; 10,000+ dietitians, available through insurance covering 200M+ people, and raised \$100M in 2026.

[Lifesum](#) – logs meals by photo, voice, text or barcode and builds personalised eating plans; 65M+ users and acquired at-home testing company LYKON in 2024.

[Ray-Ban Meta](#) – uses a camera and voice assistant built into smart glasses to log meals from a voice prompt or photo; the feature is rolling out in the US, and the glasses have sold millions of units worldwide.

[Lumen](#) – analyses a morning breath to estimate whether the body is burning more fat or carbohydrate, then suggests daily food choices; its published validation is still based mainly on small, company-linked studies.

[Function Health](#) – a yearly membership that gives people 160+ lab tests and tracks the results over time; 200,000+ members and estimated annual revenue of about \$100M.

[Jona](#) – an at-home gut test that uses deep DNA sequencing and AI to explain a person’s microbiome and suggest food and lifestyle changes; now distributed across the US through Everlywell.

[Perplexity Health](#) – an AI health service that connects medical records, wearables, wellness apps and Apple Health, then uses that information to answer health questions and show trends; rolling out to US Pro and Max subscribers.

INTRODUCTION

The pace of change is accelerating – KFF, "KFF Health Tracking Poll: Prescription Drug Costs, Views on Trump Administration Actions, and GLP-1 Use", 14 November 2025; The Health Foundation, "GLP-1 drug prescriptions for obesity", February 2026; IQVIA prescription supply data, October 2025; Natco Pharma semaglutide launch pricing, March 2026; OpenAI, "Introducing ChatGPT Health", 7 January 2026; Adyen, "35% of UK Consumers Use AI to Shop, a 39% Increase on 2024 Numbers", 15 May 2025; Lingo, Medichecks and Lumen product-pricing pages, May 2026.

Change will look different by region– Gallup, "In U.S., GLP-1 Usage Reaches New High", 7 July 2026; Brick Meets Click, "U.S. Online Grocery Sales Projected to Grow 5x Faster than In-store through '29", 3 June 2025; McKinsey & EuroCommerce, The State of Grocery Retail 2025: Europe, April 2025; World Health Organization Global Health Observatory and OECD Health Statistics; Bramble Intelligence analysis, July 2026.

MAKING IT EASY TO EAT WELL

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