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Why Mediterranean Intelligence Meets U.S. Grocery

> Independent reading of publicly available sources / Nutrilayer strategic perspective. Not sponsored or endorsed by FMI, NIQ, IFIC, GFI, AHA, UNESCO or any company cited.

01

Omnichannel is the norm

Shoppers move between online and in-store channels. The headline figure is a forecast, not current sales.

$452B

expected U.S. online grocery sales by 2028 (forecast)

94%

of grocery shoppers in 2025 bought both online and in store

11.6%

projected annual online growth through 2028

Source: **FMI / NIQ, April 22, 2026**

02

Shoppers are already trying AI

64%

of consumers have at least tried generative AI

Familiarity with AI tools lowers the barrier to assisted planning, but trying a tool is not the same as relying on it for food decisions.

Source: **FMI, April 29, 2026**

03

Convenience now leads health

61%

convenience as a purchase driver

56%

healthfulness as a purchase driver

Our reading: guidance that saves time is more likely to be used than guidance that only informs.

Source: **IFIC 2026 Food & Health Survey, July 16, 2026**

04

Plant-forward, not plant-only

$7.9B

U.S. plant-based retail market in 2025

60%

of households purchased plant-based products

96%

of households buying plant-based meat and seafood also bought animal meat

GFI also reports that plant-based dollar sales declined about 2% year on year in 2025, so the category is not unambiguously growing. These figures are not demand forecasts for Nutrilayer. What they suggest is flexible, mixed baskets rather than exclusive diets. The clearer market shifts are digital grocery and interest in nutrition, not blanket category growth.

Source: **Good Food Institute, market research**

05

The Mediterranean reference

The American Heart Association describes the Mediterranean eating pattern as a practical guide built on vegetables, fruits, whole grains, legumes, nuts, olive oil and fish. UNESCO recognises the Mediterranean diet as shared intangible cultural heritage of several Mediterranean countries, including Italy, centred on seasonality, conviviality and local food.

AHA: Mediterranean diet guide **UNESCO: Mediterranean diet**

06

Scientific evidence: what the data supports

What follows is what published sources support. It is context for design choices, not evidence that Nutrilayer itself produces any outcome.

Italian Mediterranean Diet guidelines (Nutrition Reviews, 2025). A current expert reference for Mediterranean dietary patterns.

American Heart Association. Describes the Mediterranean pattern as a practical healthy-eating guide.

Scarborough et al., Nature Food, 2023 (Oxford, observational). Diets with fewer animal foods were generally associated with lower dietary greenhouse-gas emissions. Population averages; not a fixed reduction for any individual or for Nutrilayer users.

NHS: the vegan diet. Fully plant-based diets need planning for nutrients such as vitamin B12, iron, calcium, iodine and vitamin D. No diet guarantees the absence of deficiencies.

WHO: red and processed meat. Classifies processed meat as carcinogenic to humans. This should not be stretched into an analogy with all ultra-processed plant foods.

Our World in Data: environmental impacts of food. Lifecycle comparisons across foods; product-level impact varies widely.

European Commission: Environmental Footprint methods. Harmonised LCA methods that a carbon estimate would need to follow.

FTC Green Guides. Environmental claims must be specific and substantiated; avoid sweeping green claims.

> Supported by data: digital and hybrid grocery shopping, interest in nutrition and convenience, the Mediterranean pattern as a reference, generally lower footprints of diets lower in animal foods. Design proposal, to be tested in pilots: everything Nutrilayer describes below.

07

A broader market trend

Retail nutrition combined with commerce is an active category. Instacart, Spoon Guru and Sifter are examples of this activity, cited for context only; Nutrilayer is not affiliated with or endorsed by them. We read this as a signal that the market is moving, not as a comparison table.

Instacart **Spoon Guru** **Sifter**

08

Why Nutrilayer

Nutrilayer starts from an expert-developed, professionally supervised nutritional method rooted in Mediterranean dietary principles. Technology is the layer that applies it and makes it scalable. Italian roots are a source of culinary knowledge and seasonal ingredient diversity within a heritage shared by many countries.

What we propose to bring to a retail pilot (design proposals, not proven results):

- Expert-developed Mediterranean method, reviewed by nutrition professionals
- Flexible plant-forward, nutrient-aware progression rather than a vegan mandate
- Ingredient knowledge: value, use, recipes, alternatives
- Seasonal assortment and ingredient reuse across a 7-day household plan
- White-label experience in the retailer's own brand
- Retailer analytics on anonymized, permitted data (proposed)
- Experimental planet-aware feedback with transparent, LCA-based estimates

FreshFit's experience in sport and corporate wellbeing comes from adjacent segments. It is not validation in the grocery market, which is why we propose pilots. We make no claims of health outcomes, emissions savings or sales uplift.

09

Sample grocery journey (illustrative, not live)

01	02	03	04	05
Profile	**Plan**	**Basket**	**Ingredient education**	**Retailer insights**
Household, preferences, allergens, budget, time	7-day Mediterranean-inspired menu	Matched to the retailer's catalog	Value, use, seasonality, recipes	Aggregated pilot metrics agreed with the partner

10

Explore a pilot

We are looking for retail partners to co-design and measure a 60–90 day pilot. No partner contracts are claimed.

This document provides general market information and a strategic perspective. It contains no medical claims and is not health advice.

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