Food
Consumer Observatory

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Europe wants to eat better, so why isn't it happening?

Part one of the EIT Food Consumer Observatory Trust Report Series 2026

February 2026

Trust as the foundation for change

Achieving a healthier and more sustainable European diet requires more than good intentions and innovative products - it requires trust. Consumers will be more likely to adopt ground-breaking innovations and believe the information provided about them, if they trust the people and institutions behind the food system. If they can trust that producers act with integrity, that technologies are safe and that information is transparent and evidence-based. As Europe moves towards dietary transformation, trust remains the essential ingredient that connects innovation, communication and consumer acceptance - and ultimately determines whether healthier and more sustainable eating can become the norm.

Food innovations will only be embraced by consumers if they believe that these innovations are safe and actually good for them as well as the planet.

Over the past eight years,* the EIT Food Consumer Observatory has tracked the trust Europeans have within the food system - and how this trust influences what they eat, how they make food choice and how open they are to innovation.

The 2026 edition marks an important new step: instead of one comprehensive Trust Report, the findings are now presented across four focused reports. This change reflects the growing depth and diversity of the data, as well as our ambition to make insights more relevant and actionable for different audiences - from policymakers to food companies and researchers. Together, these four reports provide a complete picture of how trust, knowledge and behaviour interact to shape the future of Europe's food system.

The framework on the following page summarises all the elements related to trust in the food system and how they interact to shape food choices.

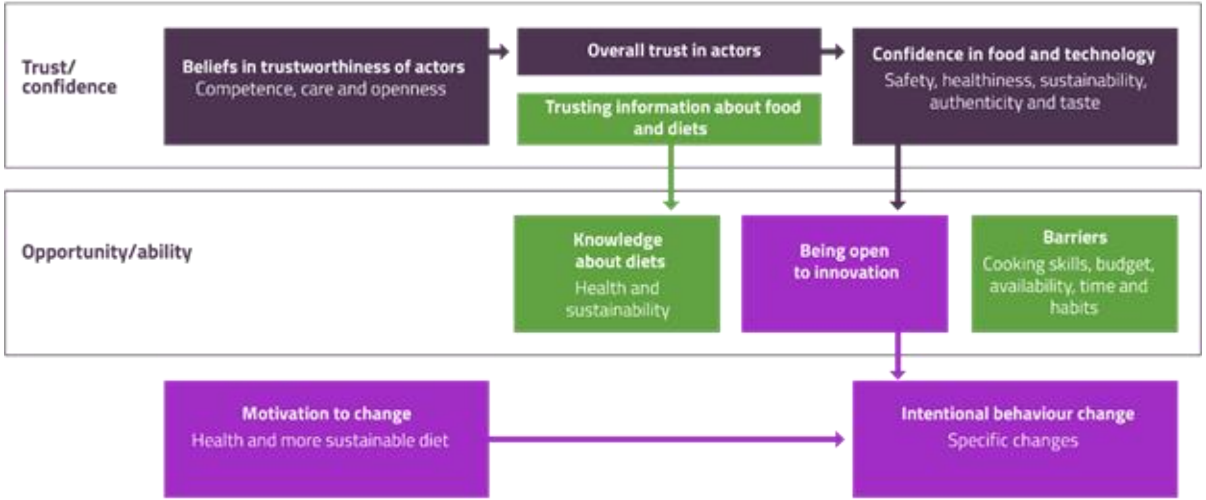
This report combines the past eight years of insights on trust through in depth-qualitative and quantitative research in the EIT Food TrustTracker® study.

- Consumers were surveyed across 18 European countries (Belgium, Czechia, Denmark, Finland, France, Germany, Greece, Ireland, Italy, The Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey, Israel and the UK).
- Fieldwork for this year's study was conducted in July and August 2025. 19,954 European consumers over 18 years old, and nationally representative in terms of age and gender, participated in the study.
- The TrustTracker® study has run every year since 2018.
- Since 2018, around 140,000 consumers have been surveyed.
- The TrustTracker® was originally developed by EIT Food partners University of Reading (project lead), the European Food Information Council (EUFIC), Aarhus University, KU Leuven and the University of Warsaw.

**Some of the elements of the study have only been included in the 2024 edition, so we have no data from before that year.*

What is part of the TrustTracker® Framework?

The model below summarises the theoretical framework that forms the foundation of EIT Food's TrustTracker®. The four aforementioned 2026 Trust Reports all highlight one or more elements of this framework.



Report 1: Europe wants to eat better, so why isn't it happening?

A deep dive into European diets, intentions and barriers to change - highlighting trends in health, affordability and sustainability.

Report 2: The state of trust in the food system

An overview of how trust is evolving across actors in the food chain - from farmers to authorities - and what drives or erodes this trust.

Report 3: Trust in innovation: Between familiarity and fear

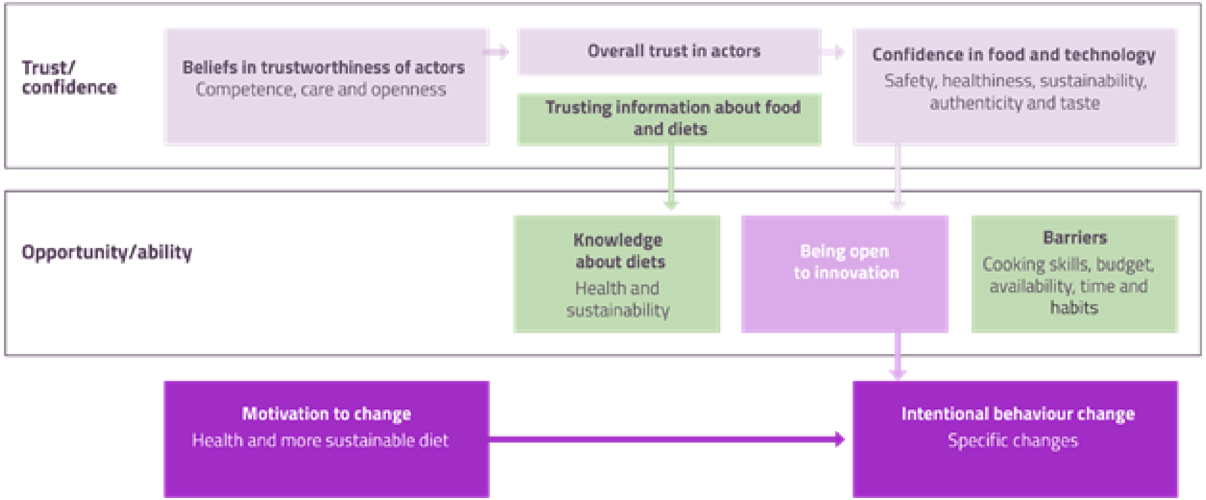
Insights into consumer openness toward new food technologies - from personalised nutrition to cultivated meat - and the cultural factors behind acceptance.

Report 4: Who do consumers believe?

Analysis of food literacy, trusted information sources and transparency expectations shaping consumer decision-making.

What is this report about?

This report discusses the actual diets and the changes European consumers are willing and able to make to their diets, as reflected in the bottom two boxes.



Report 1: Europe wants to eat better, so why isn't it happening?

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WHAT EUROPEANS ARE EATING

What Europeans are eating

This first chapter explores a simple but fundamental question: what do Europeans actually eat today?

To answer it, we asked consumers across 18 countries to reflect on their diet quality, their intake of key nutrients and how healthy or sustainable they believe their eating habits really are.

We also examined differences between age groups to understand why there are differences between younger and older Europeans' eating patterns and levels of satisfaction.

This leads to a clear picture of how Europeans see their current diet. This includes insights into where consumers feel they are doing well, where they fall short and how these patterns have shifted since last year. This chapter sets the foundation for understanding why consumers are more open, or more resistant, to dietary change.

What Europeans are eating

Key takeaways:

Diet satisfaction remains high, especially among older Europeans

- Most Europeans are broadly satisfied with their current diets: only 14% express dissatisfaction a number which is virtually unchanged since 2024. Satisfaction is highest among the 55+ group (only 11% dissatisfied) and lowest among under 35s (18% dissatisfied). This indicates that younger people are more open to changing their diet, whereas older consumers are more content and therefore less likely to alter their habits.

Self-reported diet qualities are improving, but healthy nutrient intake remains low

- Although self-reported diet quality has improved slightly, gaps remain. The share of Europeans who say they eat an unhealthy diet fell from 17% in 2024 to 15% in 2025, and those who disagree with eating a healthy diet dropped from 21% to 17%. Still, when asked about their actual intake, most Europeans under consume healthy food and nutrients such as fibre, protein and fruit. Just over half report eating enough vegetables, and perceived sufficiency declined by 2-4% across all healthy food groups since 2024.

Younger consumers focus on protein; older groups eat more fruits and vegetables

- Age differences are clear: younger consumers are more likely to report sufficient protein intake (44% want to eat more vs 22% of 55+), likely due to greater awareness of protein-rich diets. Older consumers, in contrast, eat more fruits and vegetables and have more established home cooking routines.

Sustainability intentions stagnate, with less than half claiming to eat sustainably

- From a sustainability perspective, the picture is mixed. Less than half (48%) of Europeans believe they eat sustainably, even though more consumers than last year claim to pay attention to sustainability when making food choices (up from 46% last year). Intentions to live sustainably are, however, declining consistently since 2021 (down from 76% in 2021 to 69% in 2025).

Young people seek connection to food production; older people reduce waste

- Generational differences again stand out: 23% of younger consumers say they do not pay attention to sustainability when making food choices, compared to 26% of older ones - a small but meaningful gap. 28% of younger people grow their own food, compared to 15% of 55+, showing a stronger desire to connect with food production. Conversely, over 80% of older consumers aim to minimise food waste, which is strongly linked to sustainability. The older consumers are also more likely to eat home cooked meals.

Sustainable food behaviours are declining, particularly with regard to animal-based products

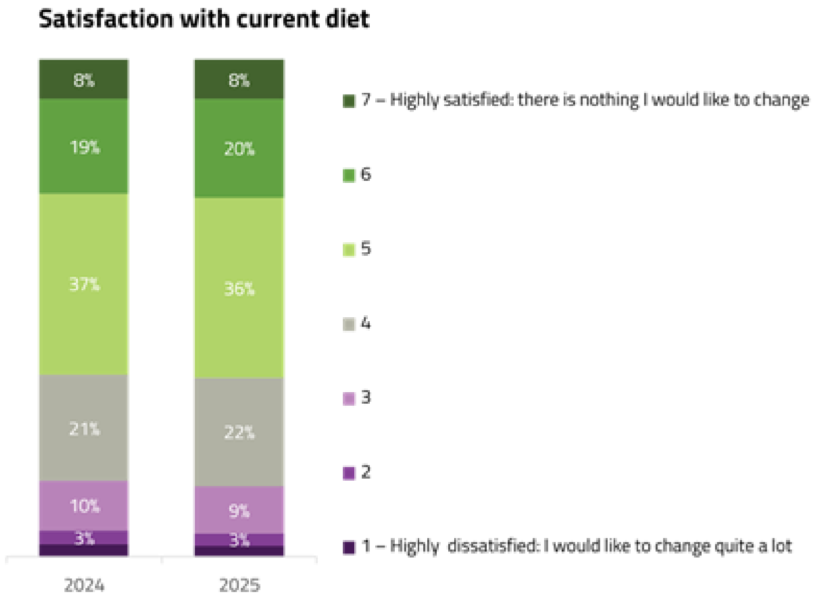
- When it comes to specific sustainable behaviours: just over half eat seasonal fruits and vegetables, but only 16% actively avoid animal-based products, down from 18% in 2024. Younger people are more likely to buy food with sustainability labels, organic and regenerative products, or those produced with minimal environmental impact.

What Europeans are eating

Implications for the food system: connect health and sustainability through generational strategies

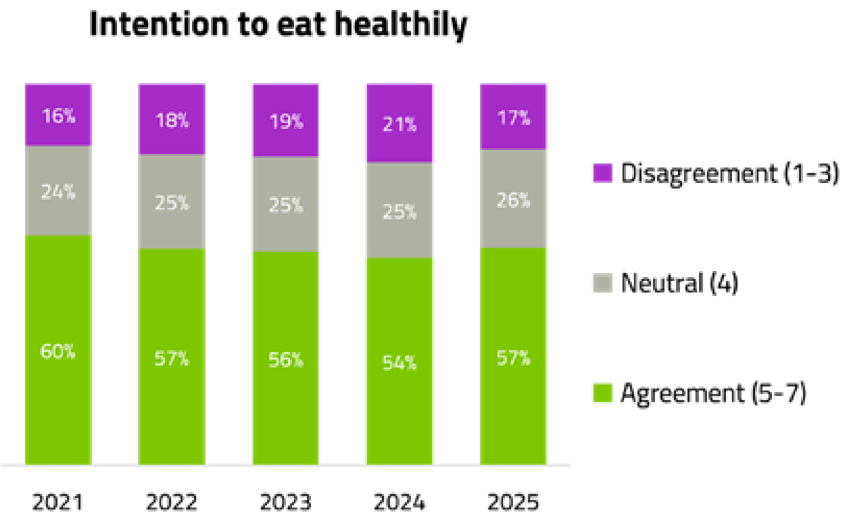
- EIT Food's mission to **promote healthier and more sustainable diets** aligns partly with consumer aspirations, but action still lags behind intention. Particularly sustainable food choices are low on the agenda for most consumers.
- The **greatest opportunity lies with younger consumers,** who are more open to dietary innovation, sustainability and change.
- **Older consumers,** while more satisfied, could be engaged through messages around maintaining health and preventing disease.
- **Reducing animal-based products** remains the single most impactful sustainability behaviour, but with only **16%** doing so, interest is limited. Framing plant-rich eating as a path to health rather than a sustainability act may drive higher engagement.
- A **diversified strategy** is needed: habit-breaking support and affordable healthy innovations for younger consumers, and practical health and cost-value messages for older ones.

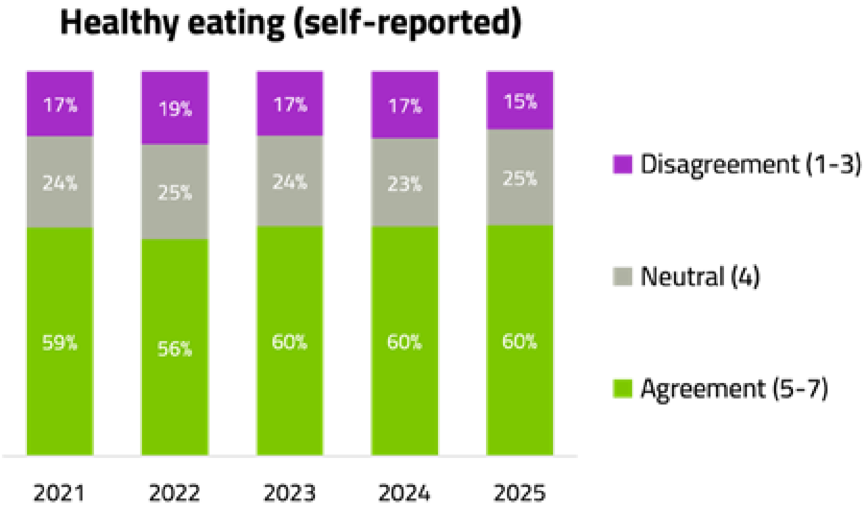
Europeans are mostly satisfied with their current diets. Older consumers are more satisfied with their diet than younger consumers.



- Dissatisfaction with one’s current diet is an important condition for willingness to change. However, the vast majority of Europeans appear satisfied with their diets. A low value of 14% indicate they are dissatisfied.
- Satisfaction values with diets has remained stable since 2024.
- 18% of consumers under 35 indicate they are not satisfied, compared to 11% of the 55+ population.
- This report explores this difference and the reasons behind it in order to understand how segmented strategy can be successful in changing food choices.

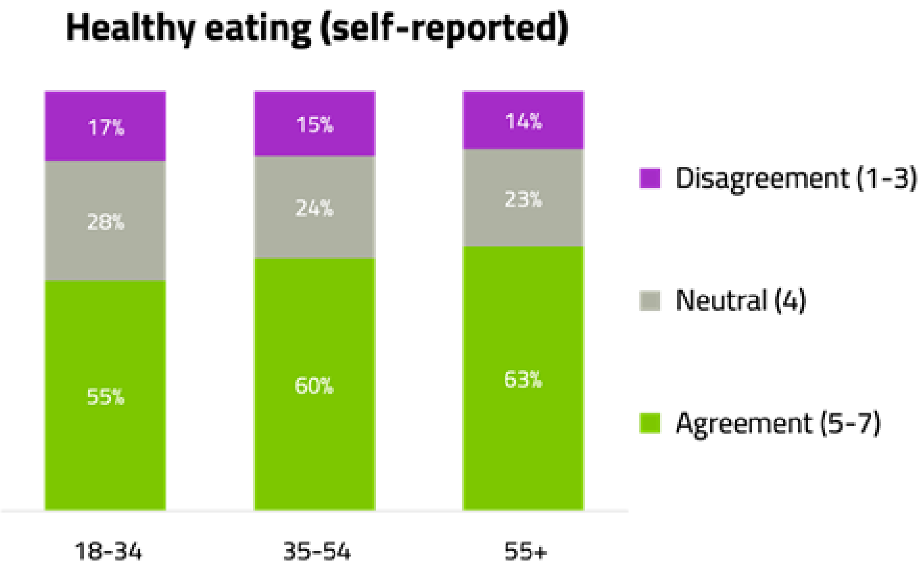
Fewer consumers report consuming unhealthy diets since last year





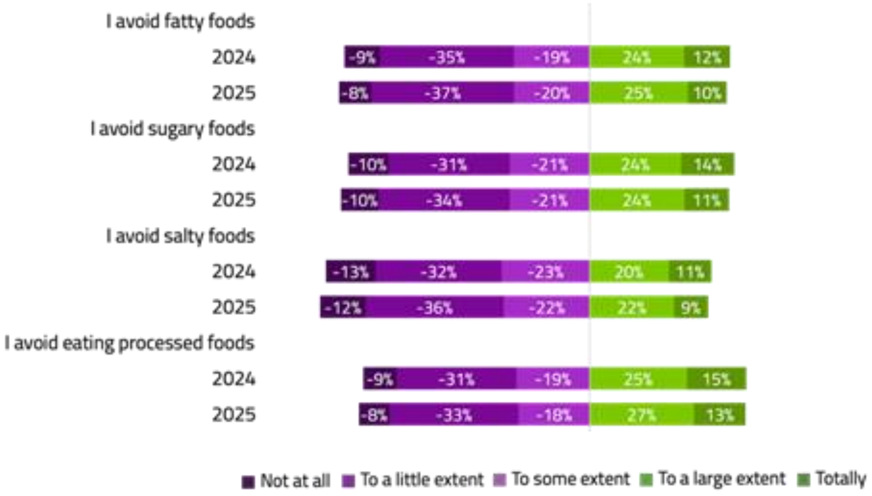
- Consumers intend to eat healthier and report eating a healthier overall diet as well. From 2024 to 2025, fewer consumers disagreed with the intention of eating a healthy diet (from 21% to 17%). Similarly fewer consumers reported eating an unhealthy diet (17% to 15%).

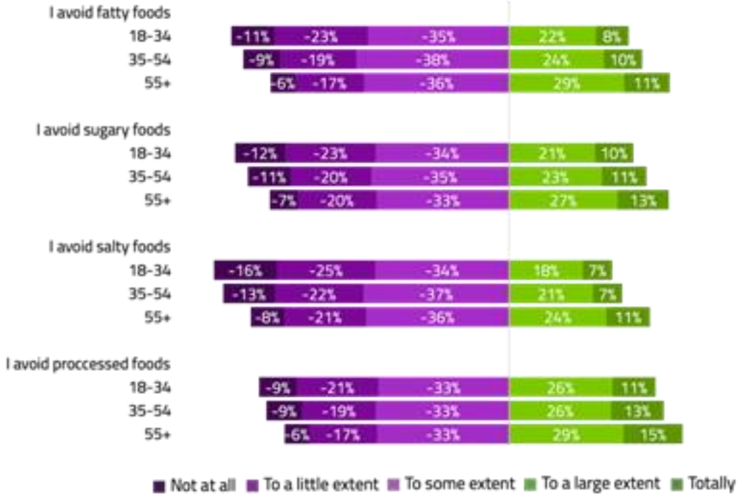
Younger consumers say they eat less healthy diets than older consumers



- The 55+ demographic say they eat the healthiest diets, whereas the 18-34 group eat the least healthily.
- This may be due to different perceptions of what constitutes 'healthy eating'. It's also possible that the stream of information available to younger consumers over social media and in schools may lead them to be more critical of their food choices.

Despite intentions to eat more healthily, consumers are eating ingredients which are unhealthier in 2025.



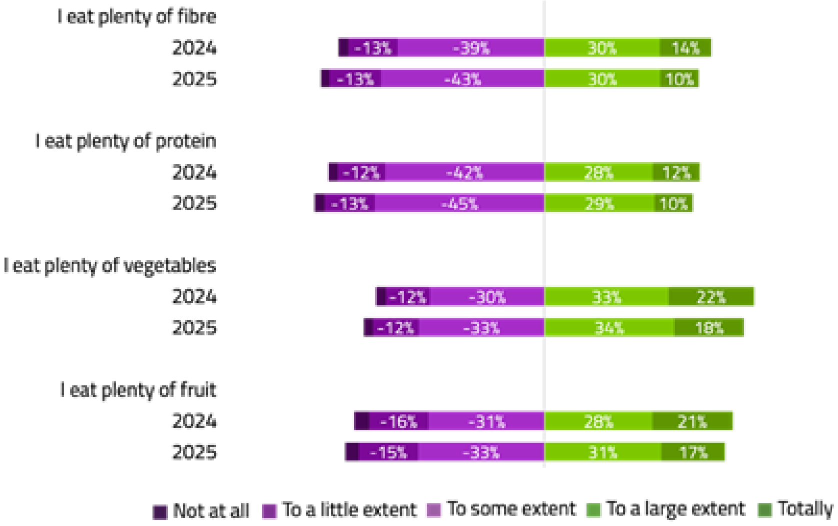


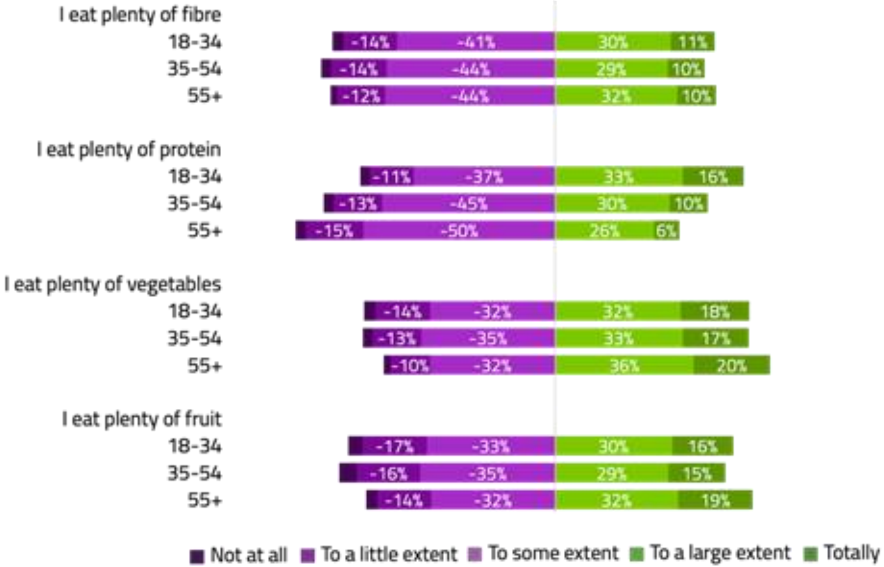
- While behaviours remain relatively stable from 2024 to 2025, across all indicators consumers are eating more unhealthy ingredients.
- In particular, the share of consumers who agree 'totally' to the statements of avoiding unhealthy ingredients has declined.

- Despite the negative health effects of these foods and ingredients, only approximately a third of consumers avoid them. While there is a slight improvement from 2024 to 2025, consumption of these nutrients remains quite stable. Avoiding processed foods is something only 40% of Europeans currently actively do.

Please note: these are self-reported diets. The graph shows to what extent consumers say they avoid these foods/ingredients. This self-reported diet is influenced by their perception of their current diet and their knowledge of ingredients. For the sake of clarity, the percentages for the answer 'don't know' are not shown.

Consumers report eating fewer healthy ingredients than in 2024



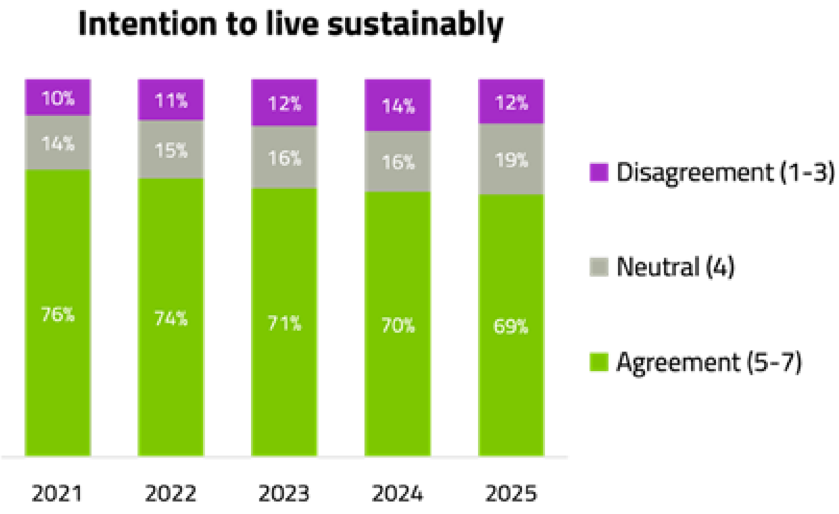


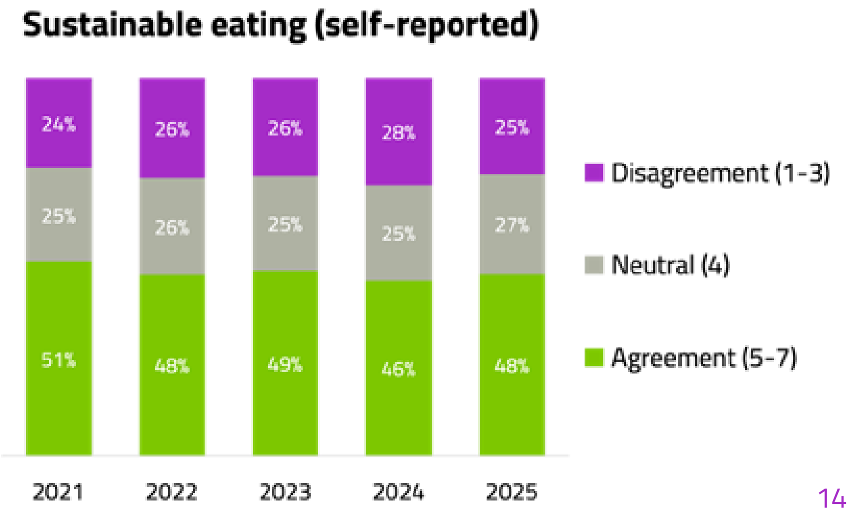
- Based on self-reported intakes of ingredients, the majority of Europeans claim to be under-eating fibre, protein and fruit. The only category in which just over half of Europeans claim to be eating plentifully is vegetables.
- There is a marked decrease in the perception of intake of these ingredients from 2024 to 2025. Each category shows a decrease of 2% to 4% of consumers that claim to eat a sufficient amount of these healthy ingredients.

- When comparing age groups, two key differences stand out. Younger consumers are more likely to report that they eat sufficient amounts of protein. This can reflect an actually higher protein intake by older consumers, but also an increased intake of proteins by younger consumers.
- Encouragingly, more of the 55+ consumers report they eat sufficient amounts of fruits and vegetables.

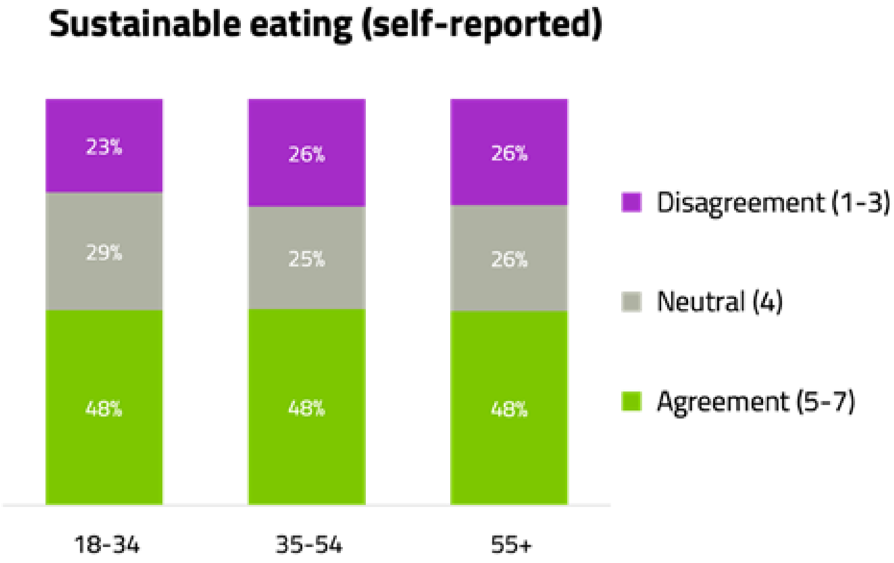
For the sake of clarity, the percentages for the answer 'don't know' are not shown.

Despite the continuing declining intention to live sustainably, in 2025 more people claim to pay attention to sustainability when making food choices compared to 2024. Still, less than half of consumers believe they eat a sustainable diet.



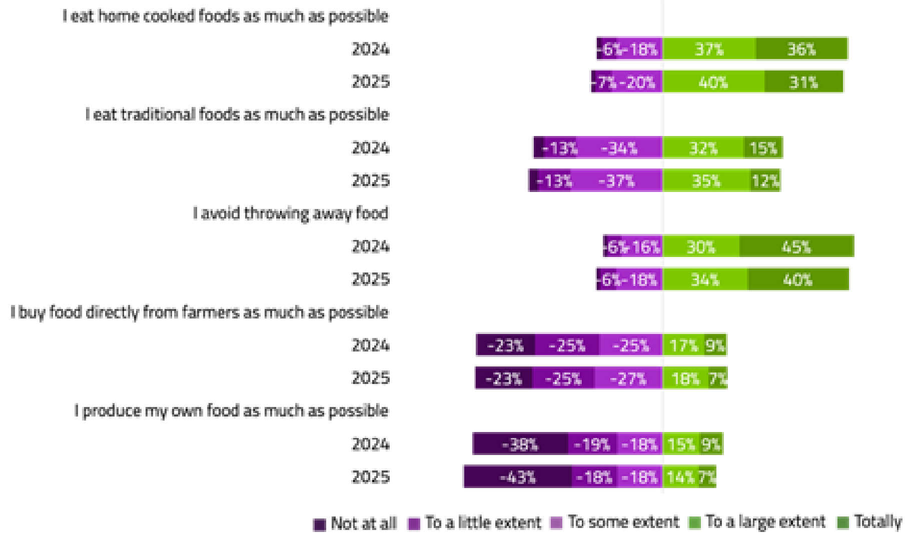


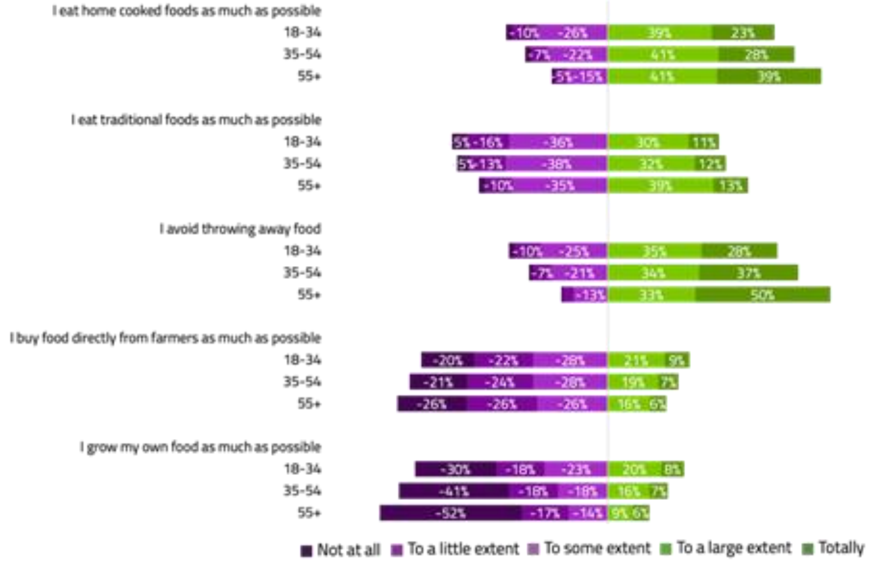
The share of younger consumers that eat a sustainable diet is equal to that of older consumers.



- What is consistent across age groups is that less than half of consumers believe they eat a sustainable diet.
- Fewer younger consumers claim that they don't pay attention to sustainability when making food choices (23% vs 26% of older consumers).

Younger consumers are more likely to engage with food production, whereas older consumers are less likely to throw away food and more likely to eat home cooked meals.

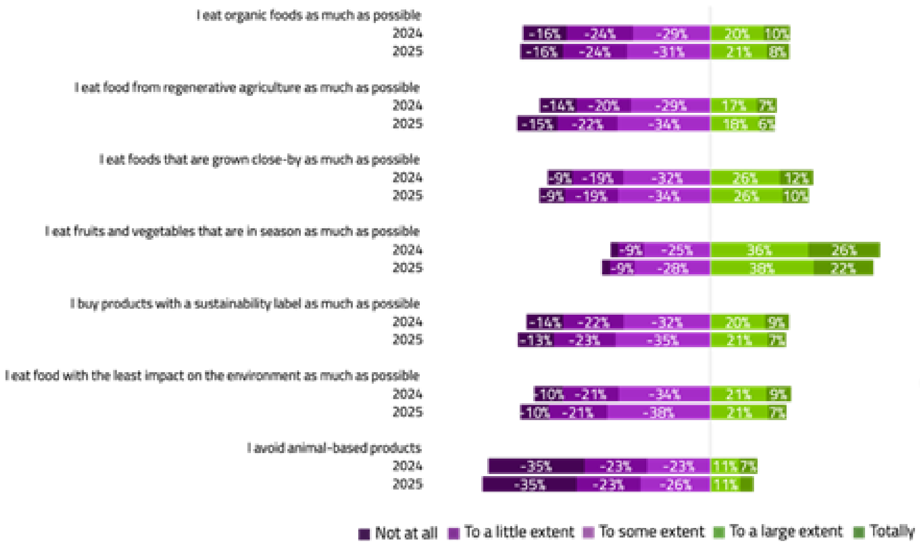


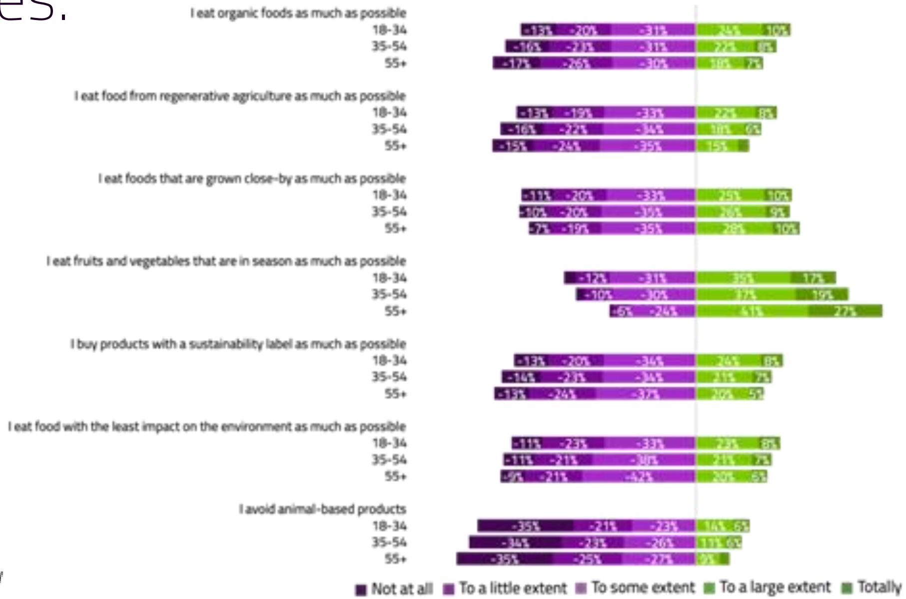


- While there is a decline in sustainable behaviours from 2024 to 2025, this reduction is subtle. The most notable shift seen is in the share of consumers that 'totally' agree with these statements about sustainable food choices.
- Avoiding food waste remains the sustainable food behavior that most people exhibit.

- Home cooked meals and reducing food waste are clear priorities for the 55+ demographic compared to younger consumers. Over 80% of 55+ consumers aim to minimise food waste.
- Younger consumers are more interested in purchasing directly from local farmers or growing their own foods. Almost twice as many young consumers grow their own food, compared to the older demographic (28% vs 15%).

Younger consumers are most actively making sustainable food choices, but overall consumers show a slightly decreasing interest in sustainable food choices.





- There has been a decline in consumer participation in sustainable food behaviours from 2024 to 2025.
- Just over half of consumers indicate eating seasonal fruits and vegetables.

- Just 16% of consumers say they do avoid animal-based products. This has declined from 18% last year.
- Younger consumers claim to be making more sustainable food choices. They are more likely to buy food made through organic and regenerative practices, food with a sustainability label and food produced with the least environmental impact possible.

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WHAT PEOPLE WANT TO CHANGE IN THEIR DIET

What people want to change in their diet *(and why they struggle)*

- While Chapter 1 focuses on what Europeans currently eat, Chapter 2 investigates what they wish they could change. We asked them which improvements they want to make to their diet - eating healthier, more affordable, more sustainable, more traditional, or more convenient foods - and how these priorities differ across generations.
- To understand why intentions often fail to translate into action, we also measured the barriers people face: habits, cost, time, confidence and feelings of control. In addition, we explored ingredient-level aspirations: who wants to eat more fruit, vegetables, fibre or protein, and who wants to reduce unhealthy foods.
- This results in a comprehensive view of the intention-behaviour gap: motivations are there, but Europeans increasingly face obstacles, particularly younger generations. This chapter highlights where the greatest opportunities for dietary change lies, and where consumers may need the most support.

What people want to change in their diet *(and why they struggle)*

Key takeaways (i):

Health remains the top dietary priority across Europe

- Across Europe, **health remains the number one dietary priority**. Over **half of consumers** (51%) would like to eat healthier. This figure is stable from 2024 and far exceeds interest in other priorities. Affordability ranks second, having grown slightly due to continued inflationary pressures. Sustainability is third but declining in salience.

Different generations, different priorities

- By age group, **healthier eating** is desired by all ages, but **older consumers** express the strongest interest. Younger consumers are more likely to seek **novelty and convenience** - foods that are quicker to prepare or more exciting to try - while **older consumers** lean towards more traditional diets.

Barriers to change are growing, especially for the young

- Despite strong intentions, **barriers to dietary change** have intensified in 2025. **Habit** and **budget** are the two most cited **constraints**. Consumers increasingly report difficulty breaking established routines and affording healthier products. These challenges are particularly acute among younger consumers, who also report the **lowest satisfaction with their diet** and the **least sense of control** over changing it.

Healthy intentions remain strong but not fully acted upon

- Most Europeans want to eat more fruit and vegetables: just over **50%** express this desire. Protein consumption is already considered sufficient by most, yet **31%** want to increase their intake – including **44% of younger consumers** compared to **22% of older ones. Fibre**, one of the most deficient nutrients, still receives little attention: fewer than half plan to increase their intake.

Older consumers aim to cut unhealthy foods; younger ones struggle more

- When it comes to avoiding unhealthy foods, the majority of Europeans say they aim to reduce processed, salty, sugary or fatty products - but this group has shrunk since 2024. **Older consumers** are most determined to avoid unhealthy foods, whereas **younger consumers** are paradoxically more likely to increase their intake of these foods, an indication of their struggle to find a diet that meets all of their desires.

What people want to change in their diet *(and why they struggle)*

Key takeaways (ii):

Younger consumers seek a stronger connection to their food

- Younger Europeans show a growing desire to connect more directly with how their food is produced. They are more likely to buy foods made through organic or regenerative practices and to engage in activities such as purchasing directly from farmers or growing their own food. Around 30% of younger consumers say they intend to eat more products from regenerative agriculture, compared with just **20% of those aged 55+**. This reflects a broader curiosity about food origins and a willingness to experiment with new, sustainability-related innovations - even if these intentions are not yet fully translated into behaviour. It's important to note that the driver behind this desire is not necessarily a wish to decrease the environmental footprint of their diet.

Overall interest in sustainable food choices is declining

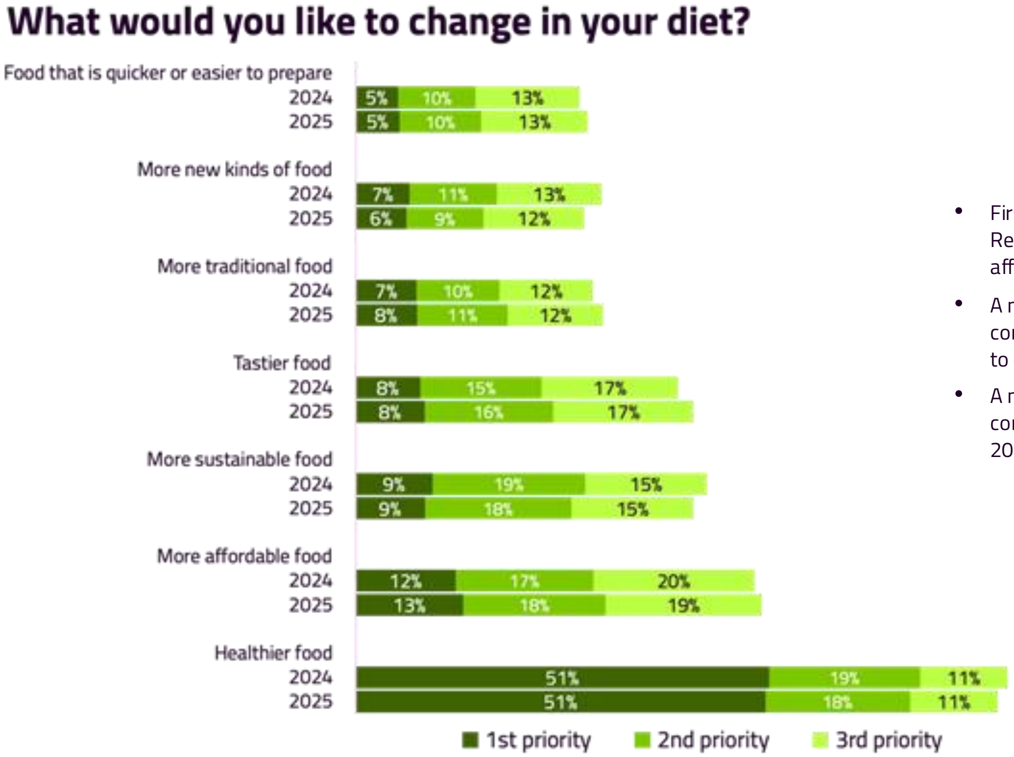
- At the same time, the general appetite for sustainable eating continues to weaken. The share of consumers wanting to eat more organic food has dropped from **40% to 37%**, and fewer people mention sustainability as a dietary priority. Only **13%** intend to reduce their consumption of animal-based foods, up only slightly from last year's **12%**. While the **55+ group** focuses mainly on eating seasonal fruits and vegetables, younger consumers' engagement with sustainability remains selective and inconsistent. This suggests that sustainability, although still valued, is **taking a back seat to health, affordability and convenience** in the minds of many Europeans.

What people want to change in their diet *(and why they struggle)*

Implications for the food system: a diversified strategy is needed for real dietary change

- EIT Food's focus on **healthier and sustainable** diets is strongly validated by consumer priorities, but strategies must be tailored.
- **Younger consumers** are the entry point for change - they are more open to innovations, sustainability claims and connecting to food production. However, they face barriers when it comes to habit and affordability.
- **Older consumers** prioritise health but need convincing that making dietary changes is worth the effort.
- **Reducing animal-based products** remains both the most sustainable and most difficult behaviour change; it should be pursued through the lens of **health benefits**, not just environmental ones.
- A **diversified approach** is essential: combining education, affordability measures and habit-breaking interventions. For EIT Food and Partners, this means:
  - Designing **accessible, convenient and affordable** healthy products.
  - Encouraging policymakers to support affordability through fiscal measures.
  - Framing plant-based and sustainable choices around **personal health and wellbeing** to drive uptake.

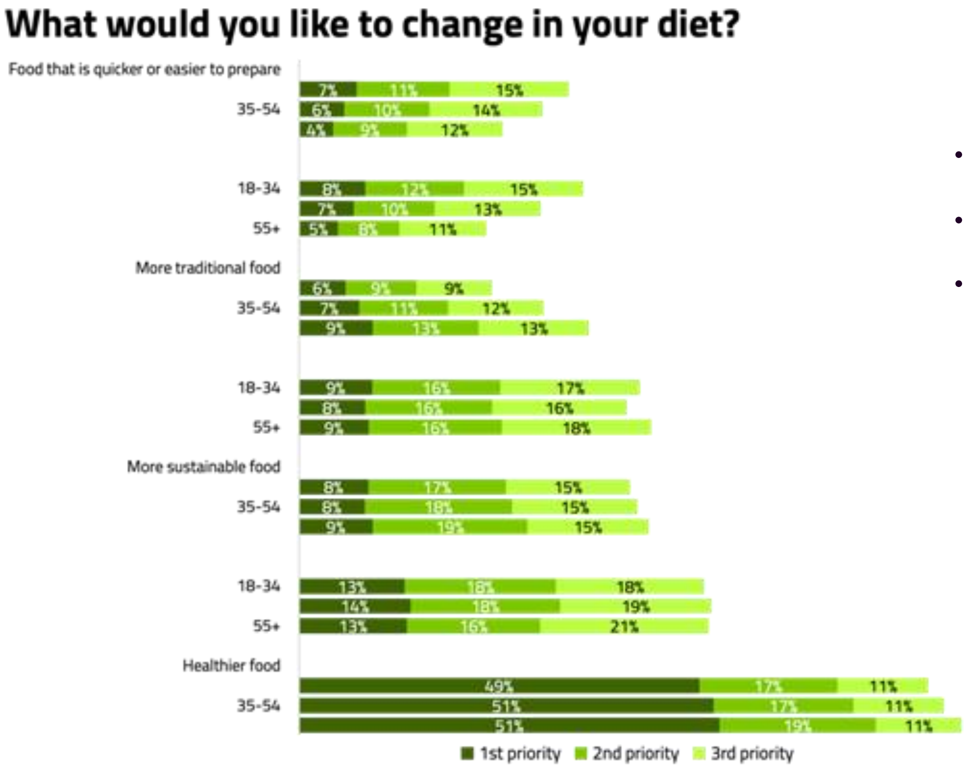
Eating healthier is the main priority



N= 18354, respondents who are perfectly satisfied are excluded.

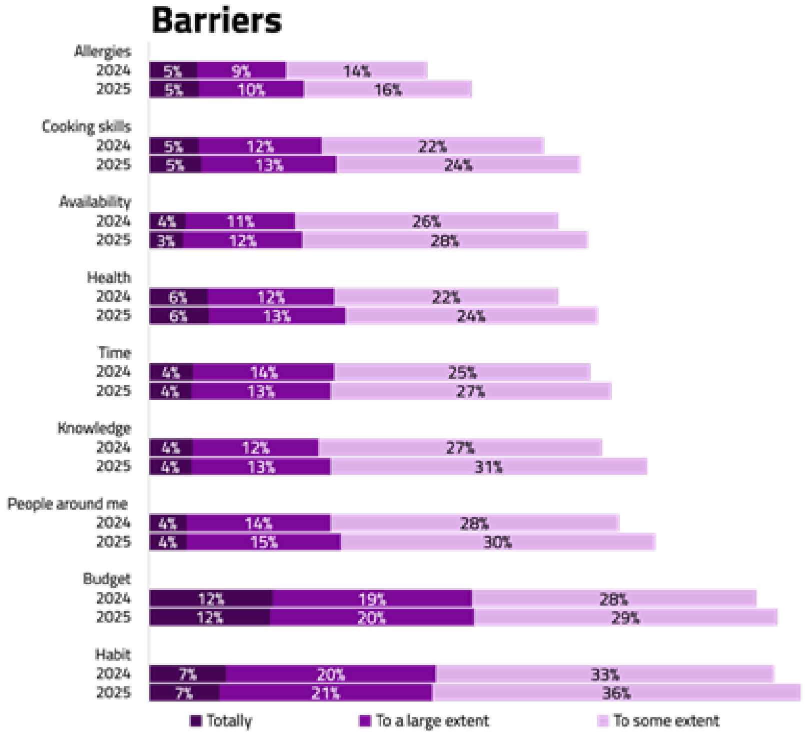
- First and foremost, consumers wish to improve the healthiness of their diets. Remaining steady at 51%, healthiness remains the first priority, surpassing affordability or sustainability.
- A more affordable diet ranks second as the most important change in diets consumers would like to make. This has grown slightly since 2024, possibly due to continued inflation and pressure on purchasing power.
- A more sustainable diet is the third most important change. The share of consumers that mention sustainability as a priority has declined slightly from 2024.

Eating more healthily is the top priority across all age groups



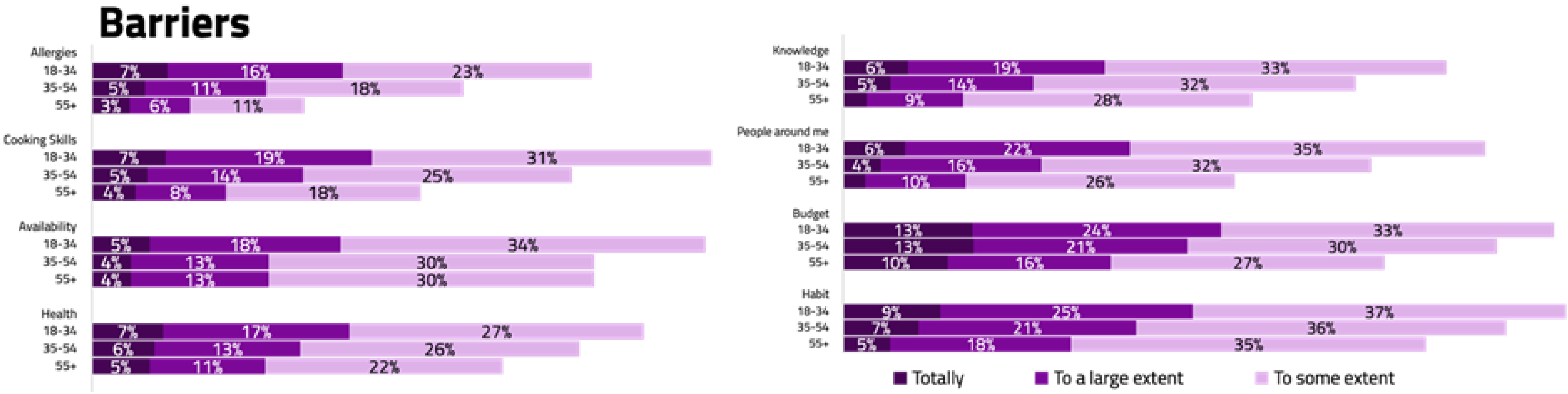
- Healthier food is by far the most desirable dietary change across age groups, although older consumers are even more interested in healthier food choices.
- Younger consumers are often far more interested in trying new kinds of food and convenient options.
- Older consumers are more interested in eating a traditional diet than younger ones.

Difficulties to break habits and budget are consistently the prime barrier to dietary change



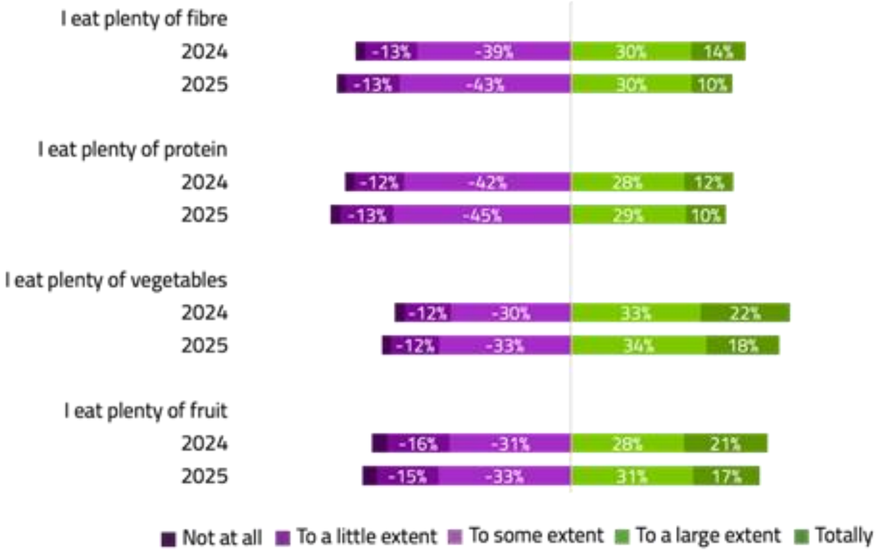
- All of the barriers we measure in the study have become more significant, meaning more consumers are experiencing them.
- This points out that consumers increasingly struggle with making dietary changes they would like to make.

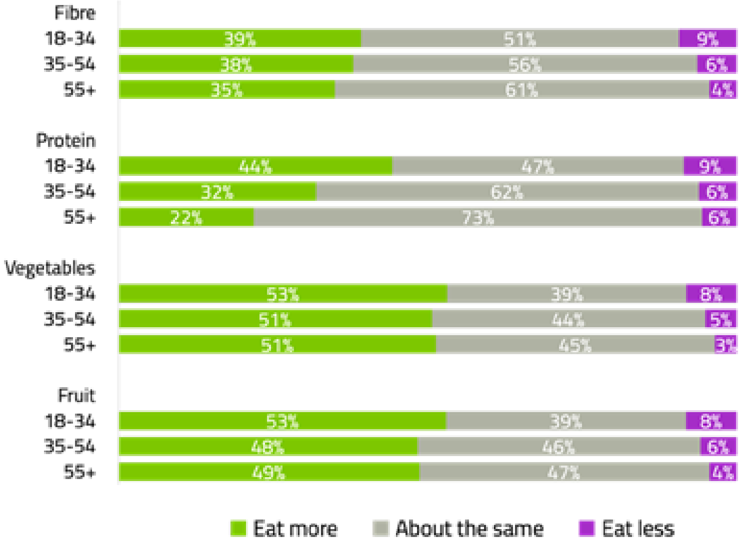
Younger consumers experience more barriers when they want to make dietary changes.



- Not only are younger consumers less satisfied with their diets, they also feel less able to change them due to the barriers they face. Consumers of 55+ years on the other hand are more satisfied with what they eat. This suggests that if they wanted to make a change they would feel more capable of doing so.

Consumers, especially younger ones, consistently prefer healthier foods.

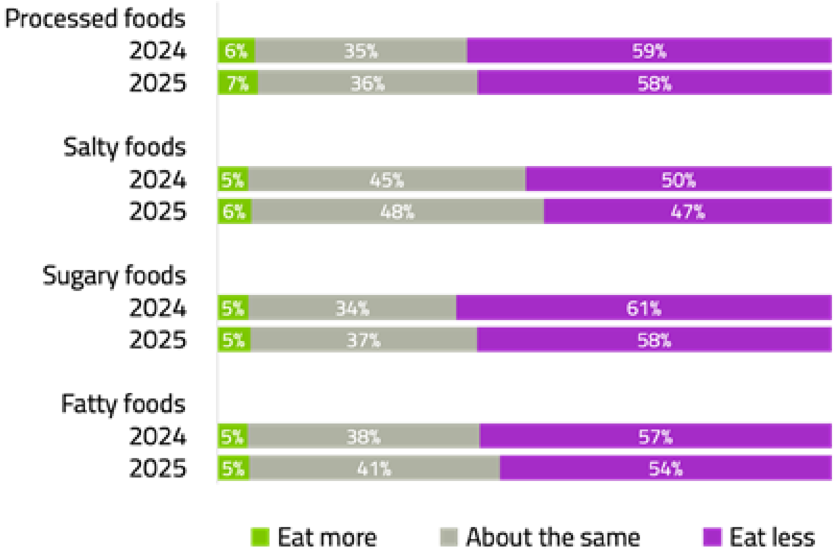


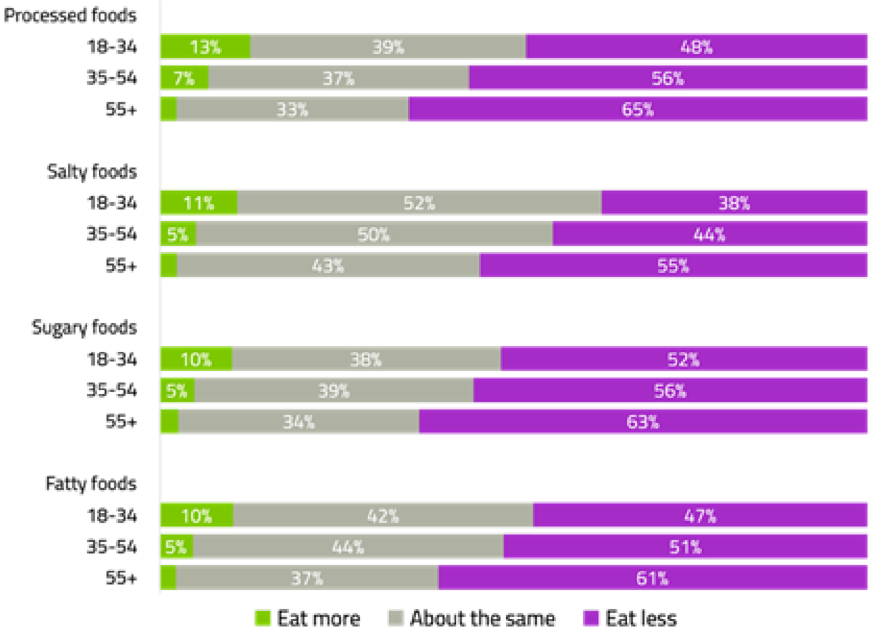


- Although the percentage dropped slightly from 2024 to 2025, more than half of European consumers would still like to increase the amount of fruit and vegetables they eat. This is in line with dietary advice.
- Most Europeans are already eating enough protein and seem to be aware of this with 62% indicating they aim to eat about the same amount of protein as in their current diet. Yet, 31% would still like to increase their intake.

- Fibre is a dietary component that most Europeans do not eat enough of. Despite this fact, only less than half have a desire to increase their intake.
- The 18-34 demographic is most interested in adding more healthy ingredients to their diets.
- The most notable difference appears in protein intake: 44% of younger consumers want to increase their protein consumption, compared with 22% of older consumers.

Most consumers intend to decrease their intake of unhealthy foods, in particular the 55+ consumers.

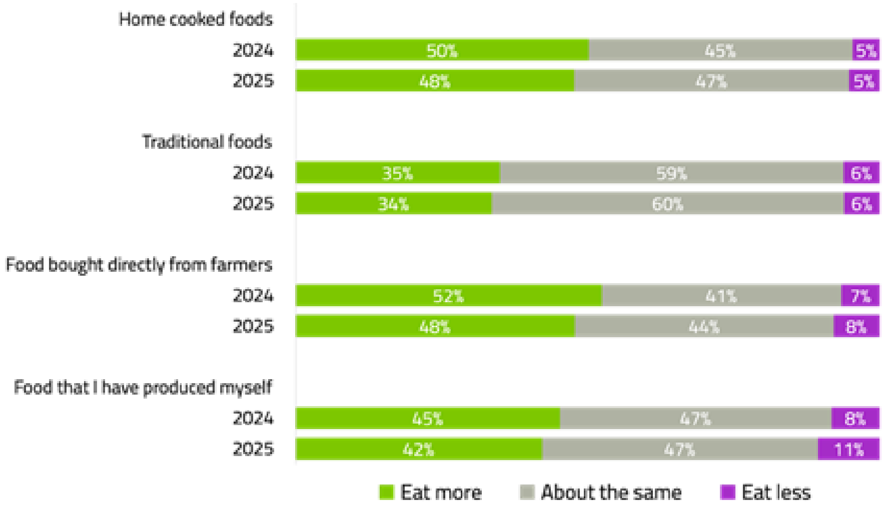


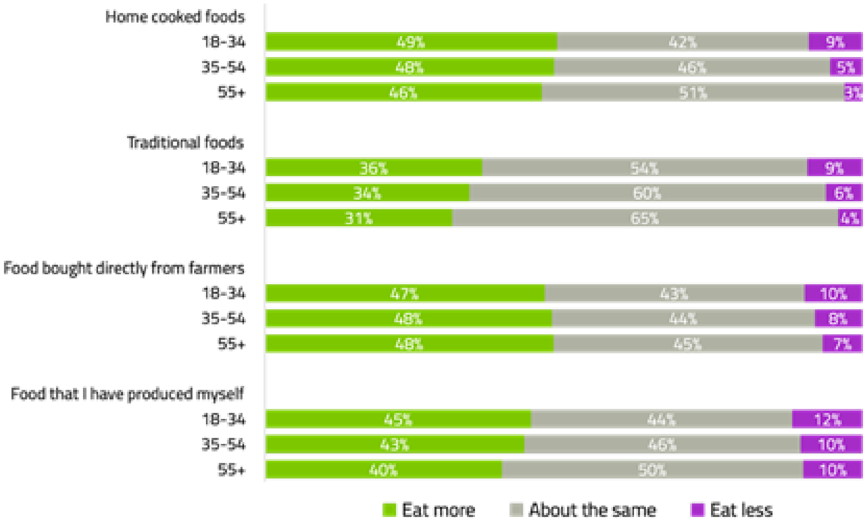


- There seems to be a consensus among European consumers on the need to avoid processed, salty, sugary and fatty foods.
- While the majority claims to want to avoid these foods, this group has decreased from 2024 to 2025. This could be because consumers believe they are eating less to begin with, or that they perceive the foods to have less salt or fat than before.

- The 55+ demographic is consistently the most interested in reducing the consumption of unhealthy products.
- Younger consumers are more likely to want to increase their intake of unhealthy products than older groups.

Consumers have become somewhat less interested in food chain related choices.

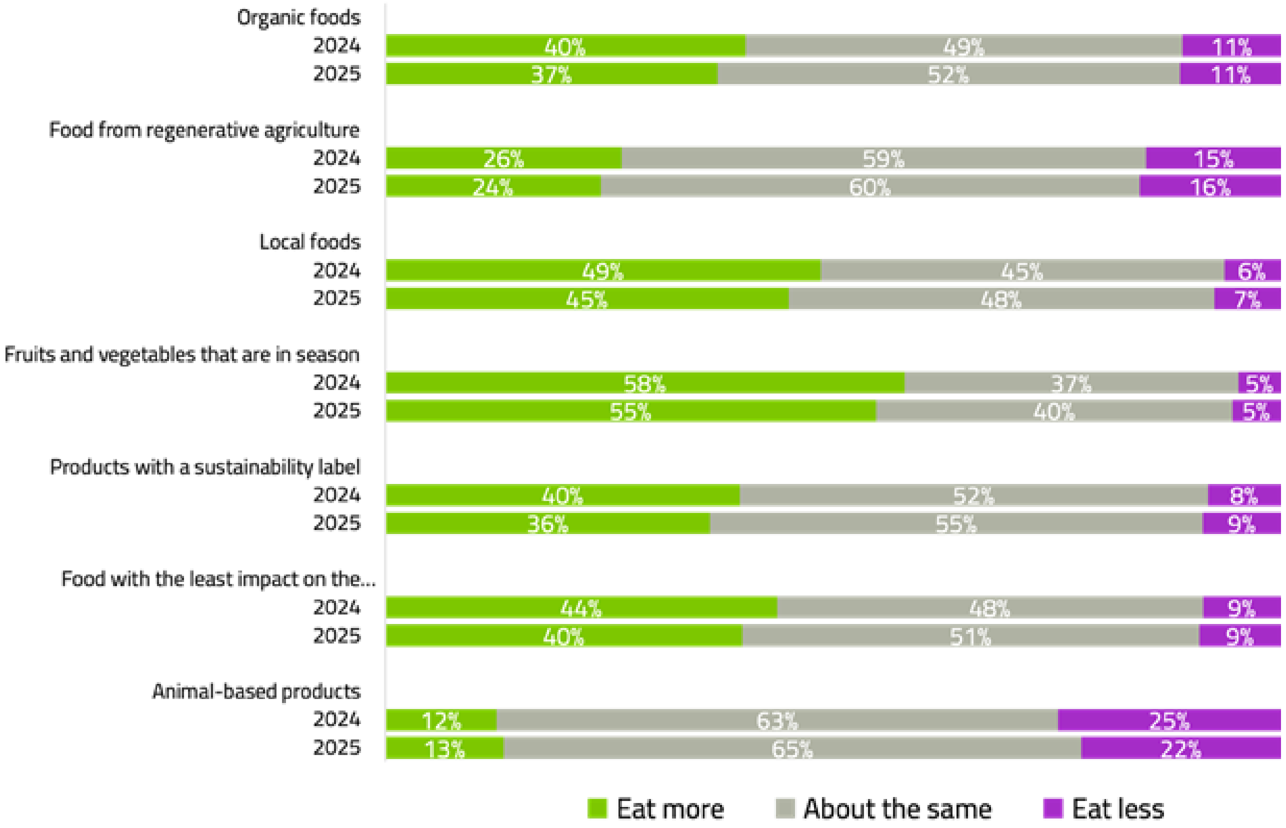




- Just under half of European consumers want to eat more home cooked foods (48%).
- About a third of consumers indicate wanting to eat more traditional foods.
- There has been a decline in the number of consumers aiming to eat more foods purchased directly from farmers (from 52% to 48%).

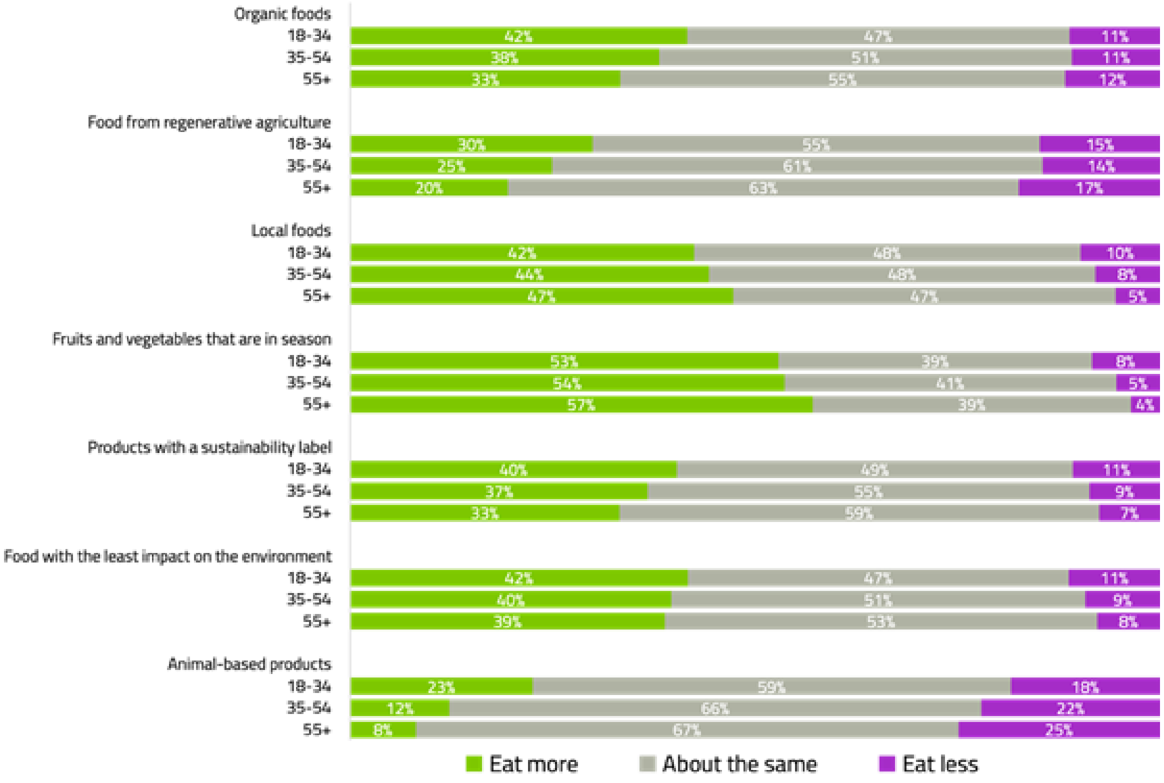
- Overall, the 55+ are the least likely to want to eat more traditional foods, at 31%.
- Just under half of consumers across age groups intend to eat more home cooked foods.

Fewer consumers aim to eat sustainable food



- The intention to eat more organic foods has dropped slightly (from 40% to 37%), while more consumers indicate wanting to eat the same amount.
- There remains little interest in increasing the consumption of products from regenerative agriculture (24%).
- The intention to reduce animal-based products is low, at 13%, but has increased slightly from 12%.

Younger consumers are most willing to make more sustainable dietary choices (except for reducing animal-based products).



- Just under a quarter of consumers intend to eat more products from regenerative agriculture. More young consumers (30%) have this intention than 55+ consumers (20%).
- 55+ consumers are most likely to increase their consumption of seasonal fruits and vegetables.

APPENDIX

About the EIT Food Consumer Observatory

Powered by EIT Food, the Consumer Observatory brings together experts and consumer insight organisations from across the food system to curate and produce consumer insights, trend analysis and research tools.

By combining research expertise, sector knowledge and the green transition behaviour change perspective, the Consumer Observatory aims to maximise the availability of consumer insights on agrifood topics, delivering greater knowledge, strategy and guidance to agrifood stakeholders – helping to bring about positive change in the food system.

This platform puts consumer knowledge and behaviour at the heart of the conversation on food sector trends, driving forward innovative solutions that will help to achieve EIT Food's three missions:

- A Net Zero Food System
- Healthier Lives Through Food
- Reducing Risk for a Fair and Resilient Food System

To access the latest insights or to discuss your specific insight needs, visit **eitfood.eu/projects/consumerobservatory**
or get in touch via
co@eitfood.eu
For more information about EIT Food Consumer Observatory reports, download our **reports disclaimer**.

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Thank you