

The state of trust in Europe's food system

**Part two of the EIT Food Consumer
Observatory Trust Report Series 2026**

May 2026



Contents

1. Executive Summary	3
2. Key Takeaways	7
3. Findings	10
4. About the EIT Consumer Observatory	30

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.

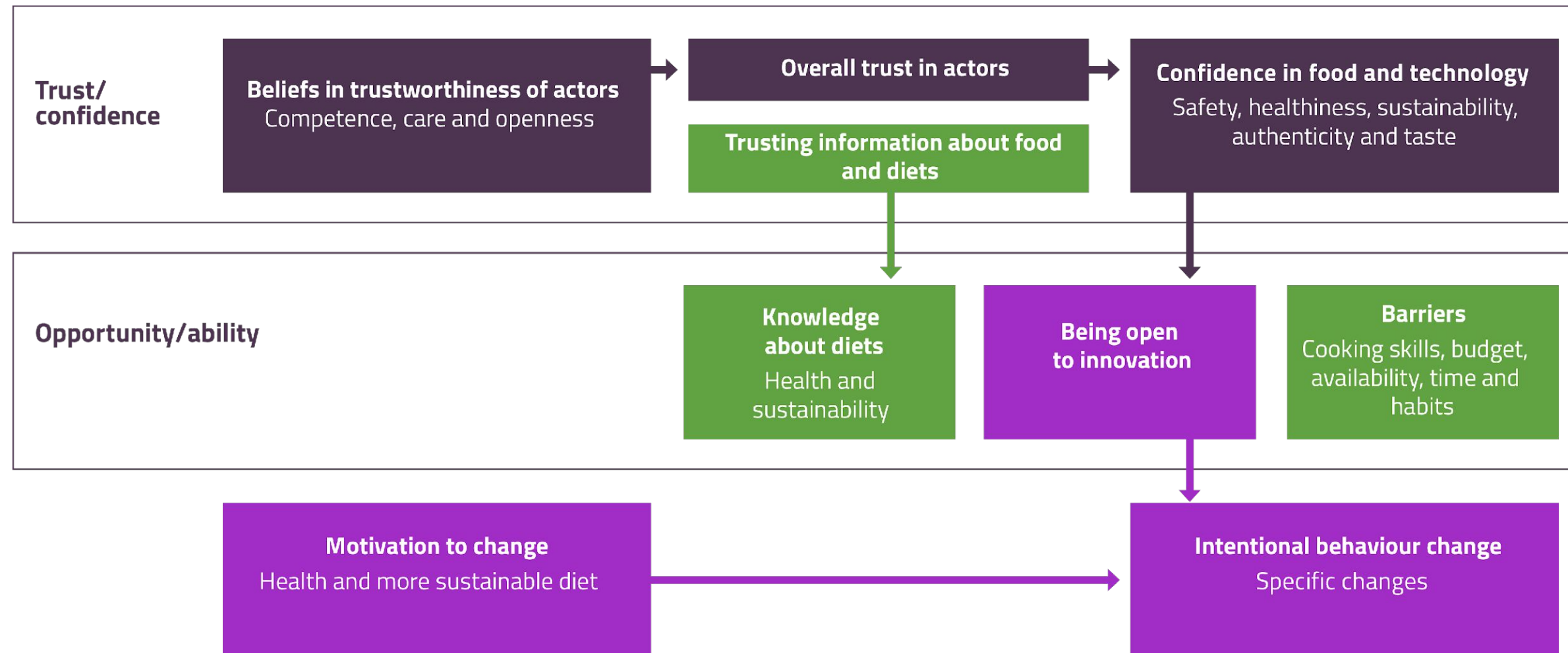
This report combines the past eight years of insights on trust through in depth-qualitative and quantitative research in the EIT Food TrustTracker® study.

- 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: What Europeans eat and what they want to change

A deep dive into Europeans' 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

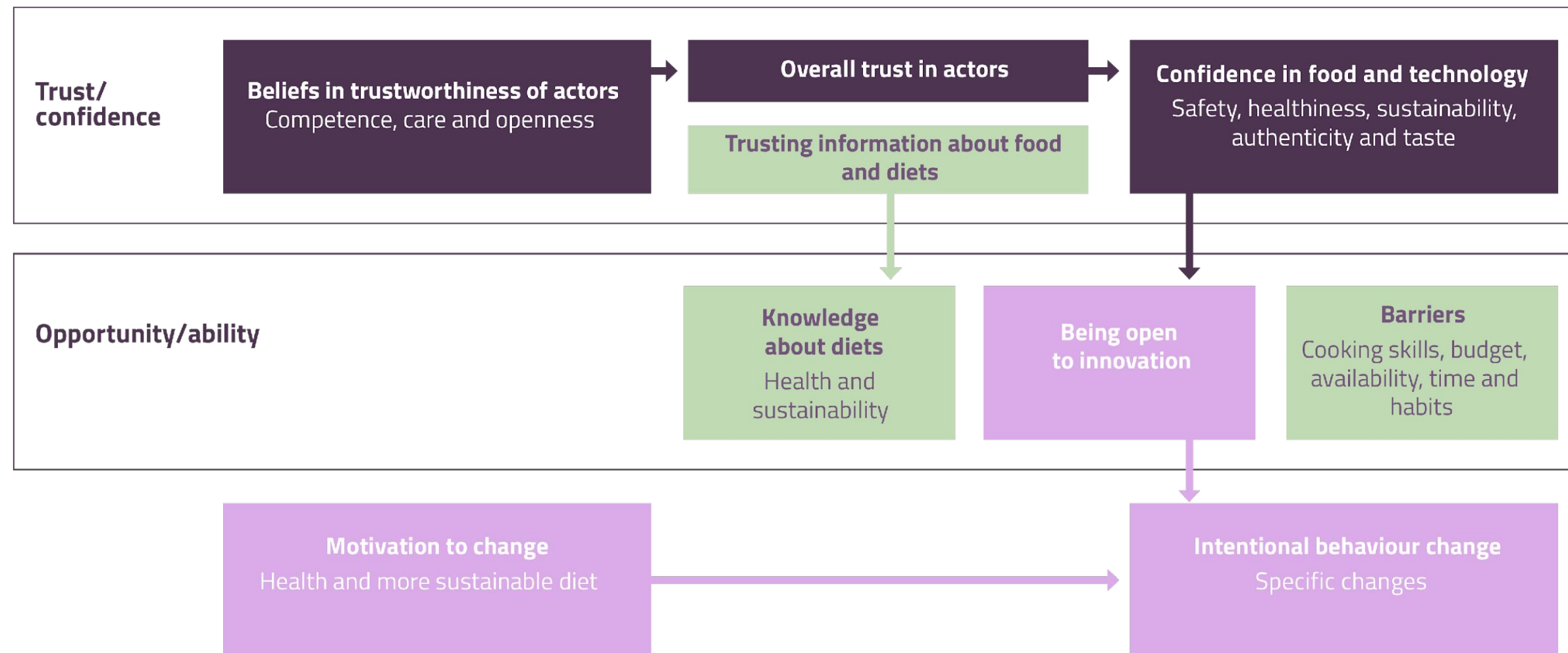
Insights into consumer openness toward new food technologies – from personalised nutrition to cultivated meat – and the cultural factors behind acceptance.

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 trust Europeans display in the food system actors and the confidence they have in food.



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.

The State of Trust in Europe's Food System

What to expect in this report

- Trust is an essential foundation for a functioning and future-proof European food system. As consumers navigate a landscape of rising prices, new technologies, environmental concerns and conflicting information, trust determines whether they feel confident in the actors who produce, regulate and sell their food. It influences not only how people judge safety, quality and sustainability, but also whether they are willing to adopt innovations, believe public guidance, or change their dietary habits.
- Over the past eight years, EIT Food's Consumer Observatory has monitored this trust through the **TrustTracker®**, examining how consumers evaluate the *competence*, *care* and *openness* of different food system actors. This second report in the Trust Series 2026 focuses specifically on how trust has evolved from 2021–2025 across five key groups: **farmers, retailers, restaurants & caterers, manufacturers and authorities**.
- The 2025 results show a picture of **broad recovery**: after a dip in 2023, trust levels are rising across most actors, driven by improvements in transparency, service experiences and perceived professionalism. Yet the recovery is uneven. High-trust actors such as farmers maintain a strong lead, while others – particularly manufacturers and authorities – continue to lag behind.
- This report explores where trust is rising, where gaps remain, and what these trends mean for the future of the European diet. It also examines the underlying determinants of trust – competence, care and openness – to identify the levers with the greatest impact. Combined with the findings from Report 1, it provides a holistic view of how trust, knowledge and behaviour interact in shaping Europe's path towards healthier and more sustainable food systems.



KEY TAKEAWAYS

The State of Trust in Europe's Food System

Key takeaways

- Trust is recovering across all major actors, with the strongest improvements between 2023 and 2025. Restaurants & caterers and retailers show the most pronounced gains, while authorities and manufacturers also improve after historic lows. Overall, the data show that while Europeans still trust some actors more than others, the general direction is positive. The food system is becoming more trusted – slowly, but consistently.
- **Farmers** remain the most trusted actor in the European food system, with 68% of Europeans expressing trust in them. They consistently outperform all others on competence, care and openness, far above the all-actor average. Their scores show renewed upward movement in 2024–2025.
- **Retailers** demonstrate consistent recovery. After a decline between 2021 and 2023, their scores in competence, care and openness rise strongly. Openness in particular shows rapid improvement, approaching the all-actor benchmark.
- **Restaurants & caterers** show the strongest improvement overall. Trust jumps from 48% to 53% in two years, surpassing the all-actor average for the first time. All three trust determinants show growth in the past year.
- **Manufacturers** show modest but meaningful progress. Competence remains stable at a relatively strong level, while care and openness begin to recover after hitting a low point in 2023–2024. Their upward trend is slow but consistent.
- **Authorities** show notable and consistent recovery on all indicators of trust. After hitting an all-time low in 2023, trust in authorities improved for two consecutive years – a sign that consumers are responding to more visible regulatory action and communication.
- Trust remains fairly consistent across age groups. Differences between demographic segments are small. Older adults trust farmers most; younger adults slightly favour restaurants and caterers – but overall, generational trust patterns are aligned.
- The determinants of trust reveal the same pattern across actors.
 - Competence is typically the strongest dimension for all actors.
 - Care is the most challenging, with sizeable gaps between farmers and other actors.
 - Openness is the main driver of recovery – improvements in transparency clearly translate into higher trust.

The State of Trust in Europe's Food System

Implications

For policymakers

- **Increase visible transparency and communication.** Authorities have made strong gains in openness but still trail behind the average. Continued clarity around regulation, enforcement and food safety standards will strengthen this recovery.
- **Create enabling conditions for responsible innovation.** Trust underpins acceptance of new technologies. Clear oversight, evidence-based guidance and open dialogue will help consumers feel confident in food system transitions.

For retailers, manufacturers and food brands

- **Double down on transparency.** The strongest improvements for manufacturers and authorities come from openness. Clear pricing, ingredient transparency, sustainability documentation and accessible communication are key differentiators.
- **Humanise brands.** Consumers distrust “faceless” corporations. Showing the people, processes and values behind a brand can reduce distance and build emotional trust – particularly crucial for manufacturers.

For communicators, NGOs and civil society

- **Focus on competence-through-evidence.** Trust rises when consumers see quality and safety demonstrated, not just claimed. Evidence-backed messaging helps reassure a sceptical public.
- **Bridge the trust gap between actors.** Farmers enjoy very high trust; others do not. Connecting stories of collaboration across the food chain can reduce polarisation and strengthen confidence in the system as a whole.
- **Engage younger audiences with openness and values.** Younger consumers respond particularly well to transparency, sustainability narratives and ethical commitments – but need these values to be credible and proven.

Overall implication

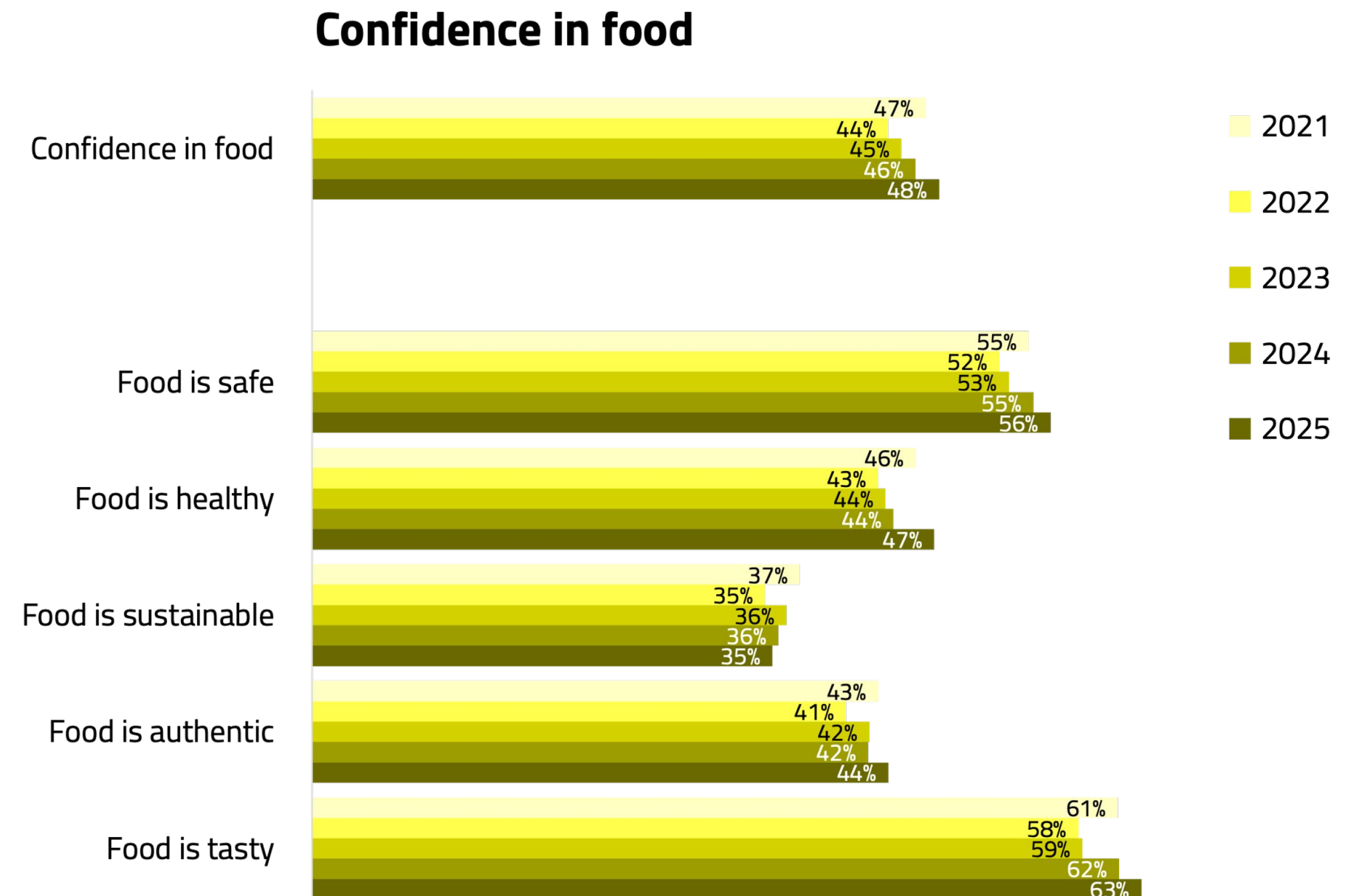
- Europe's food system is experiencing a **broad but fragile trust recovery**. The task ahead is to consolidate these gains by strengthening competence, demonstrating care, and being radically open about how food is produced, regulated and sold. Trust is not just an outcome it is a prerequisite for achieving healthier, more sustainable and more resilient diets across Europe.

FINDINGS

Confidence in food is on the rise, it is seen as healthier, tastier, safer and more authentic.

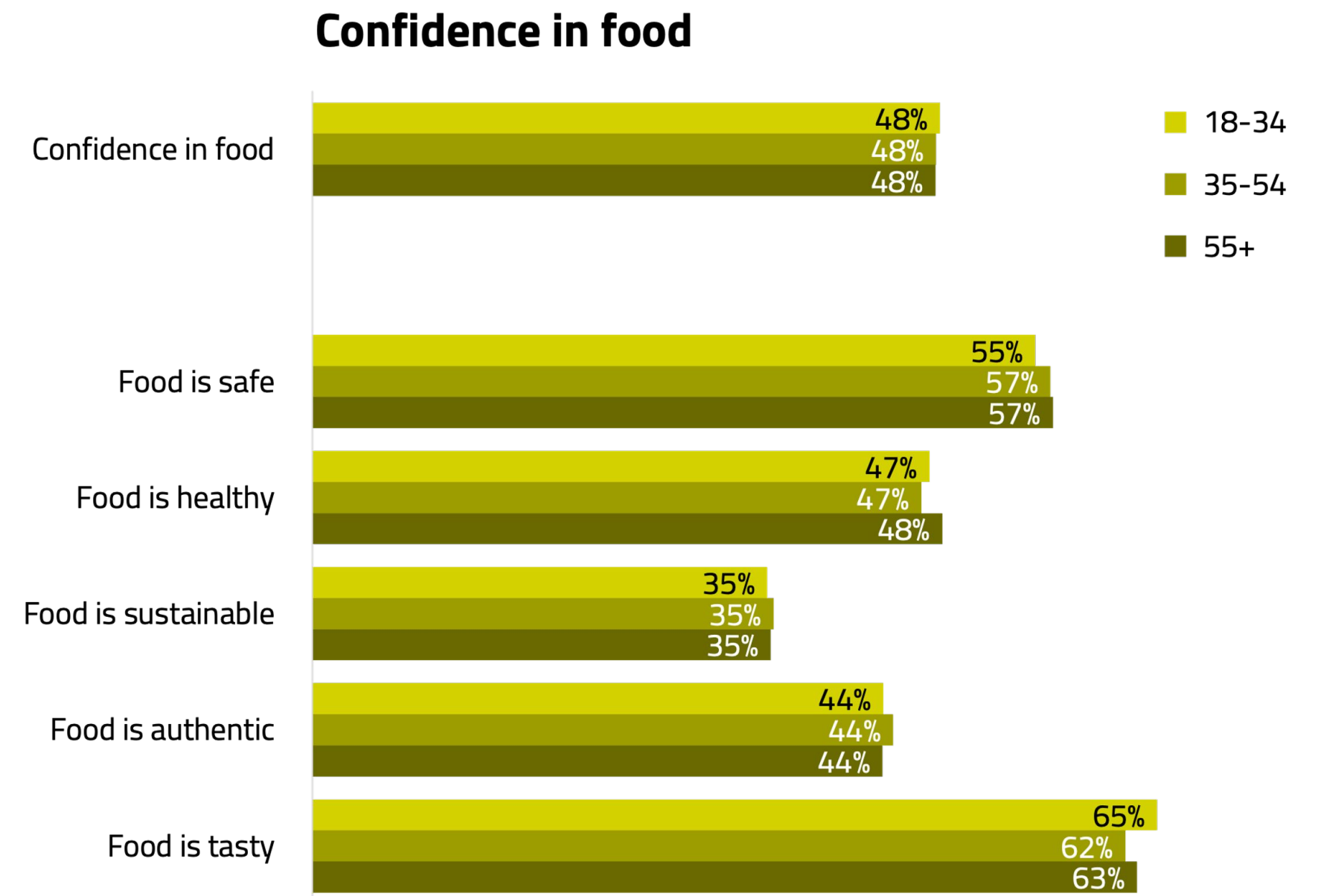
Following a sharp drop after 2021, from 2022 onwards, overall confidence in food has increased incrementally. Still, less than half of consumers show confidence in food.

- Out of the five elements, four have seen an increase. In particular, the perception of the healthiness of food has increased, from 44% to 47%.
- The perception of food sustainability is consistently low and even slightly declining. Just over a third of consumers (36%) see the food available to them as sustainable.



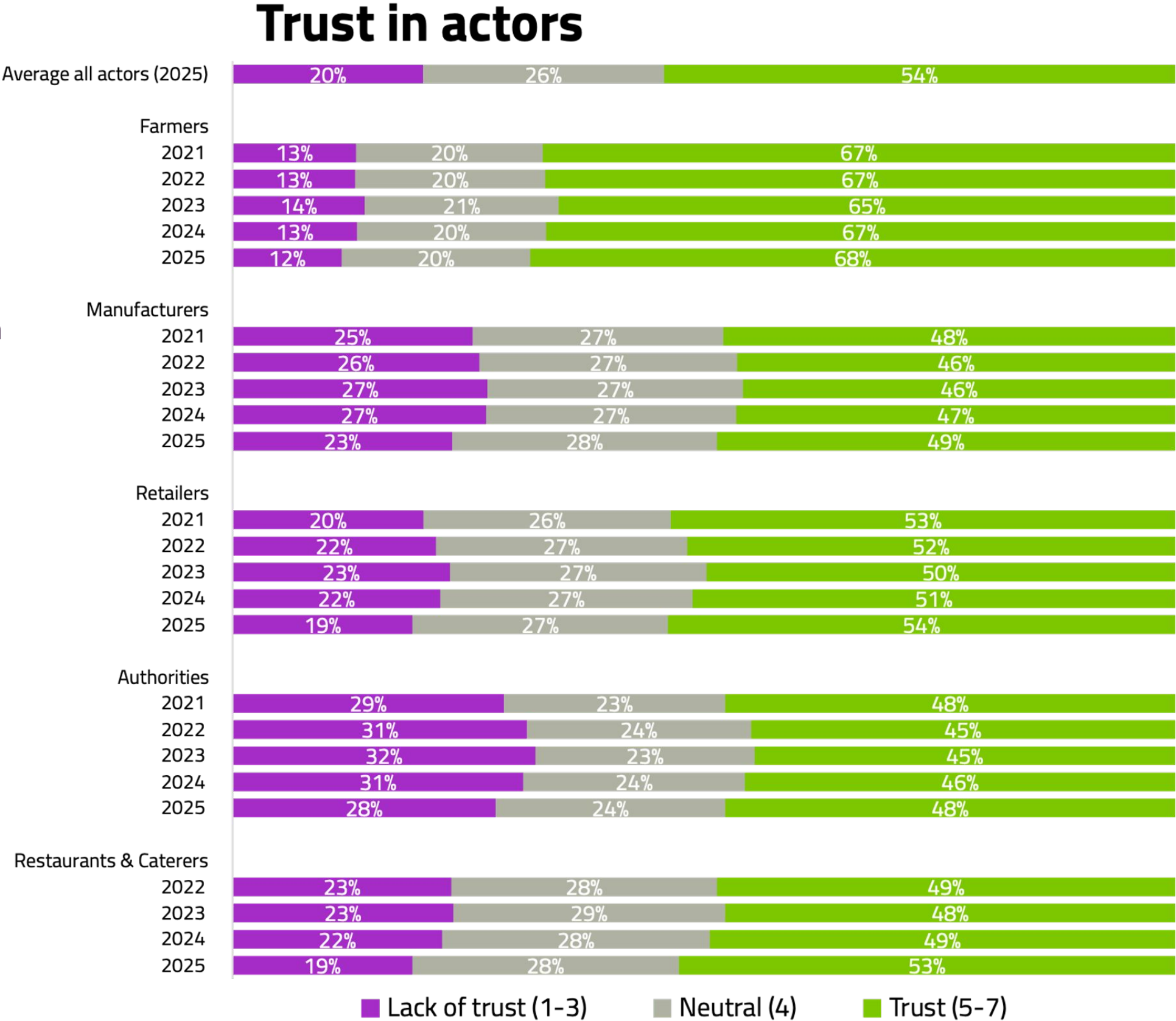
Confidence in food is consistent across age groups

- The perception of food is rather consistent across age groups. Consistency only deviates slightly in safety and taste. While younger consumers consider food slightly less safe than their older counterparts, they see food as (slightly) more tasty overall.



Trust in all actors improved from 2024 to 2025.

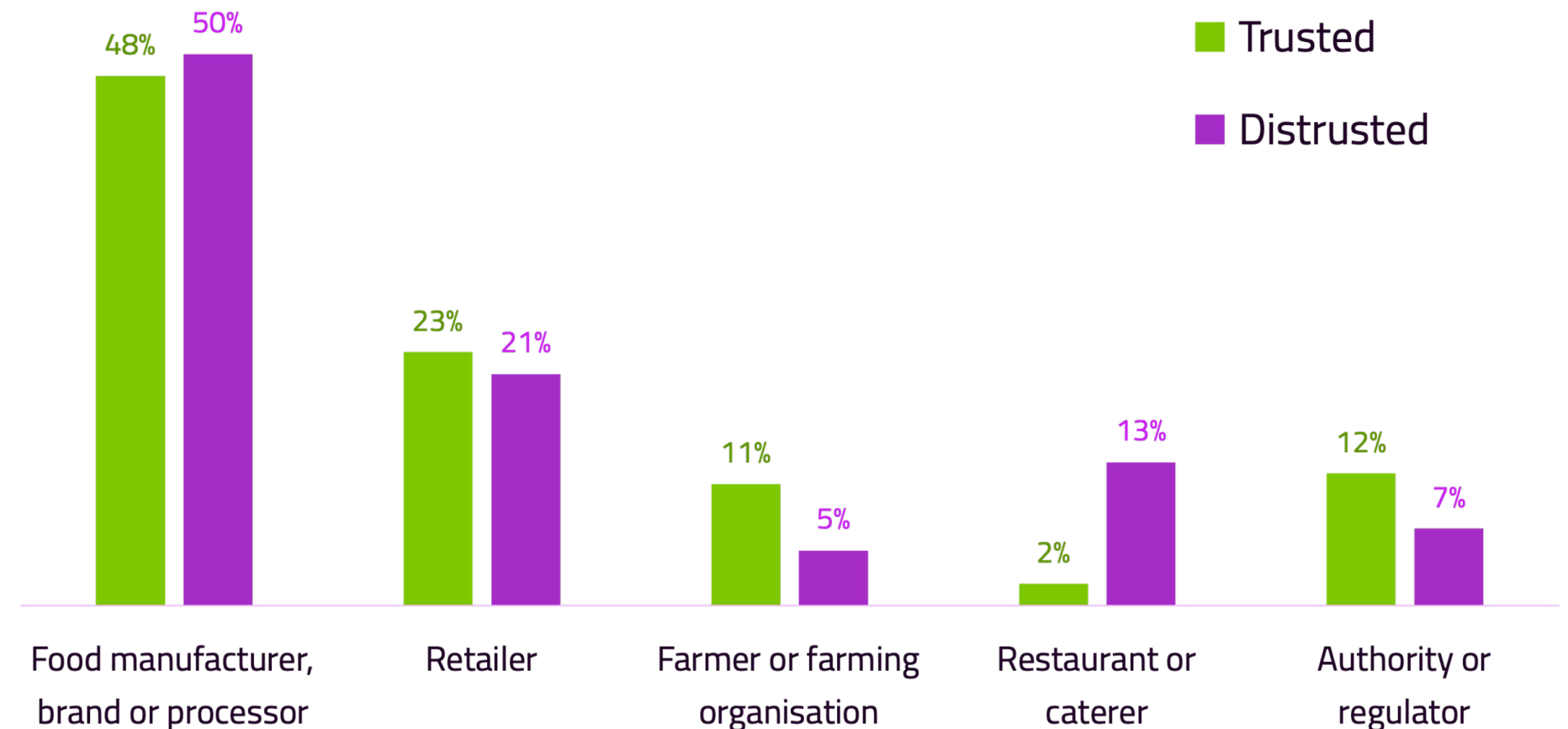
- Farmers remain the most trusted food system actor.
- Trust improved especially in restaurants and caterers (from 49% to 53%) as well as in retailers (from 51% to 54%).
- Authorities remain the least trusted actors, closely following manufacturers.



Food manufacturers, brands and processors are front of mind for many consumers

- When asked about which companies they trust or distrust, consumers often think of large food companies. Knowing their brands, products and logos consumers cultivate a sense of trust and familiarity with big names. On the other hand, consumers dehumanise large corporations and believe they are largely profit driven rather than value-driven, leading to distrust.
- Farmers, both on an individual level and farming organisations are generally trusted by consumers. Even though consumers rarely personally engage with farmers, they see them as trustworthy naming twice as many farmers or farming organisations they trust versus those they distrust.
- Examples of restaurants and caterers that are distrusted by consumers four times outnumber those that are trusted. This may be due to the personal memories associated with a visit to an unhygienic or unfriendly establishment.

Examples of (dis)trusted organisations (2025)



How to build trust?

There are a range of elements that influence trust. Building trust will depend on many contextual features, the most important one being social trust: the perception in the honesty, integrity and reliability of others. Other factors such as demographics, geography, culture and the like also play an important role. There is not one universal variable that will make or break the trust consumers have in actors in the food system.

This summary is a broad indication of features that were identified by European consumers across demographic categories.

- Building trust in actors is often a time-related practice, with many consumers indicating that a household brand or a name they grew up with is therefore trustworthy; "this name is a childhood memory" or "it has been on the market for generations".
- Family or friends purchasing from this actor also increases the sense of trust in a name. This is also true for consumers who have worked for a company or know someone who has worked there.
- On a larger scale, consumers indicate that a national brand, such as a Swiss brand, is trustworthy. Here, the actor aligning with a consumer's nationality signals some sort of kinship and brand loyalty. In this loyalty, consumers tend to connect 'tradition' or 'heritage' to their appreciation of an actor. For example; "it is part of the Italian tradition". It seems to be not only trust but also pride and identity that acts as an extension of trust.
- An extension of this is the reliability and overall reputation of an actor or name. Consumers associate reliability with the consistency of good quality and fresh products. Quality in particular is named as a main reason to continue to trust a brand. In addition, a personal experience that has been consistently positive is a prime factor in building trust among consumers. They mention frequency with which they shop at a given retailer or engage with a brand as reason to continue to do so.
- Some consumers list social or environmental values as a key reason why they trust a brand. They name consistent and evidence-based commitment to, for example, fair wages or animal welfare, as important reasons to stay loyal to an actor or brand.
- Transparency is valued by consumers. They name adhering to regulations and openness about price as positive actor behaviours. Strict rules, hygiene and cleanliness are appreciated among consumers.

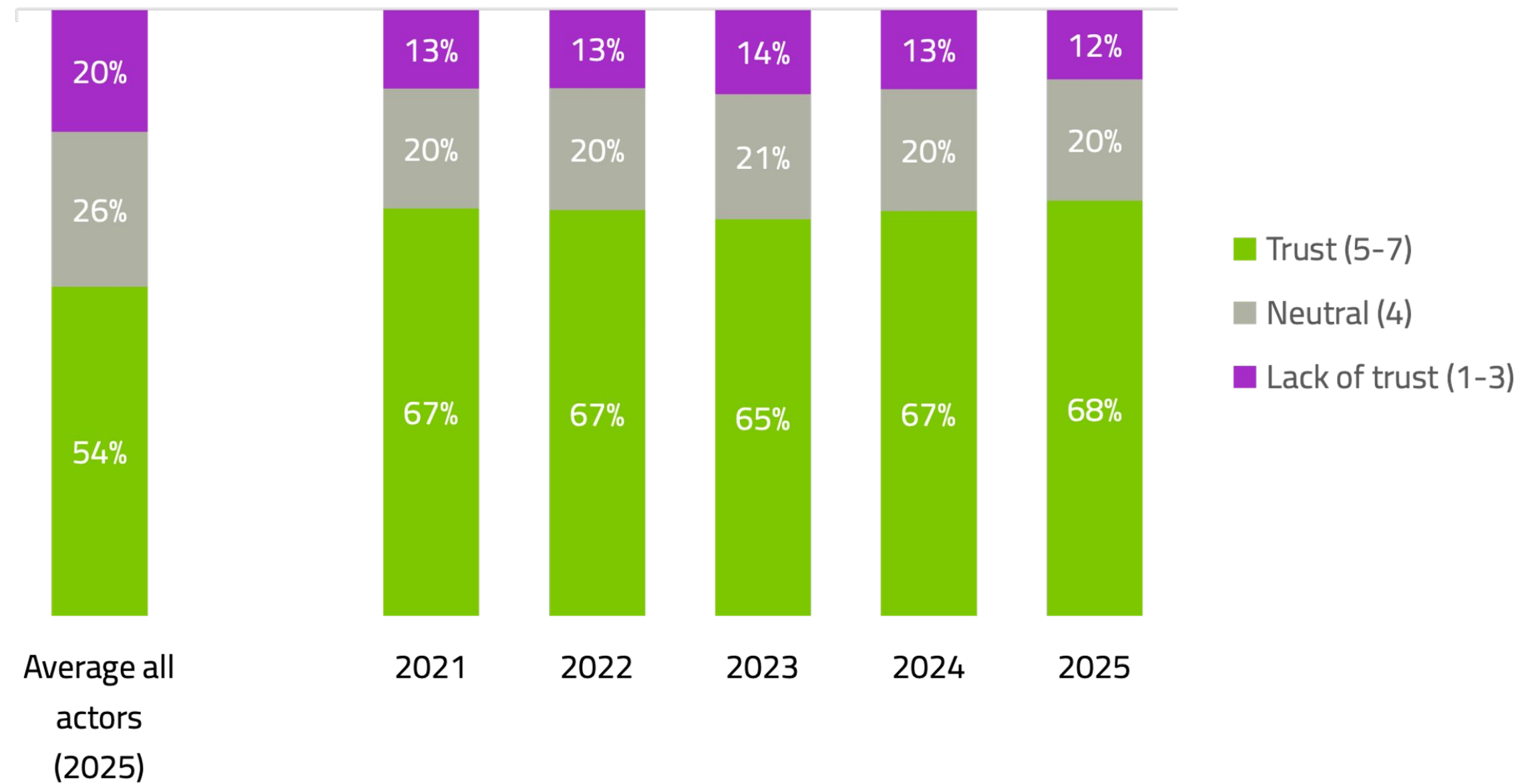
Factors that cause trust to decline

- Factors that cause consumers to lose trust in actors range from political associations, to media scandals, to poor personal experiences.
- Consumers often name scandals as reasons not to trust actors. These range from contaminated products to environmental scandals to human rights infringements. As an extension of this, consumers often name the mistreatment of animals as a reason to distance themselves from a brand. Either food safety issues in animal product supply chains or welfare mismanagement is reflected on very negatively.
- The quality of food products is a main contributor to maintaining or losing trust. Quality in both food safety standards but also in terms of freshness and taste. Consumers have negative associations with chemicals and additives in their food and find this misleading.
- If a company is big, this can both be a reason to trust it and a reason not to trust it. The size is often linked to profit and a lack of care for their customers or employees; “because big companies can’t be trusted, it’s always about money...” or “they are only greedy for profit”. It is important to note that a company’s size is as much a reason to trust as it is to distrust a company.
- Price and especially cheap products are not seen as trustworthy. Consequently, junk food chains and those producing fast foods are also consistently seen as not trustworthy and as harming the health of their consumer-base.
- Many consumers have anecdotal experience through which they decide this brand or company is not to be trusted.

Trust in farmers is consistently high (and increasing)

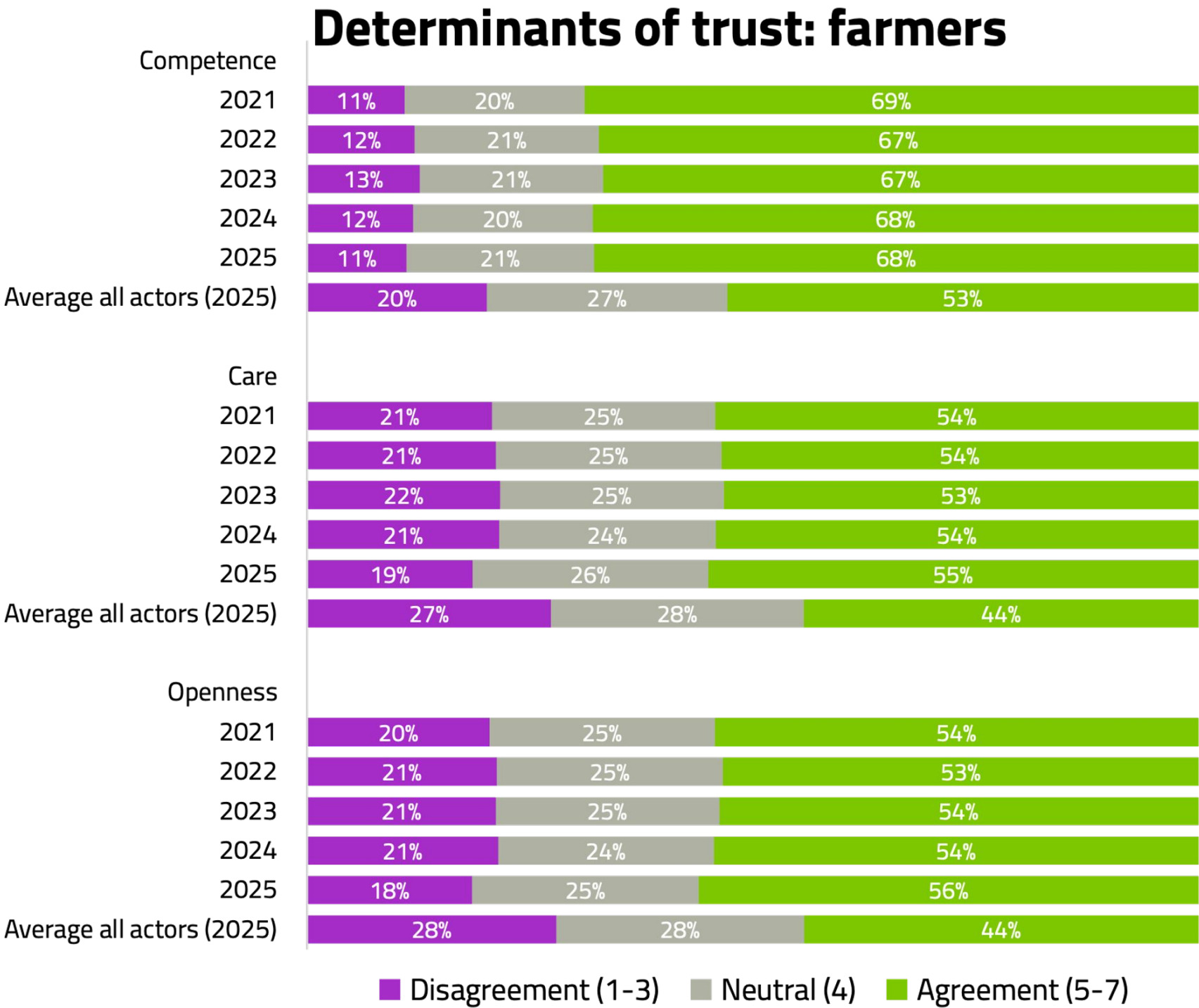
Farmers have been the most trusted food system actor since the start of the TrustTracker in 2018. While there was a small decline in 2023, rates have since recovered reaching an all-time high of 68% in 2025.

Trust in farmers



Farmers score consistently higher than all actors on competence, care and openness

- Across all years (2021–2025), farmers score significantly higher on all three trust determinants than the overall 2025 average for all actors – especially on competence, where agreement levels reach 67–69% versus 53% for all actors.
- The score for ‘care’ for farmers remains stable around 54–55%, clearly above the 44% average for all actors, with very low “disagreement” scores compared to the benchmark.
- For openness, farmers maintain levels of 56–57%, also outperforming the all-actors average of 44%, while “lack of trust” remains consistently low (18–21%).
- On all determinants farmers score slightly higher than 2024, indicative of a clear upward movement since 2023.



Factors that cause trust to decline

In 2025, EIT Food's Consumer Observatory published a study exploring how young people perceive agricultural careers. The findings show that while the public largely trusts farmers, this trust does not translate into young people entering the profession. In Europe, 35% of farmers are aged 65 or older, while only 11% are under the age of 40.

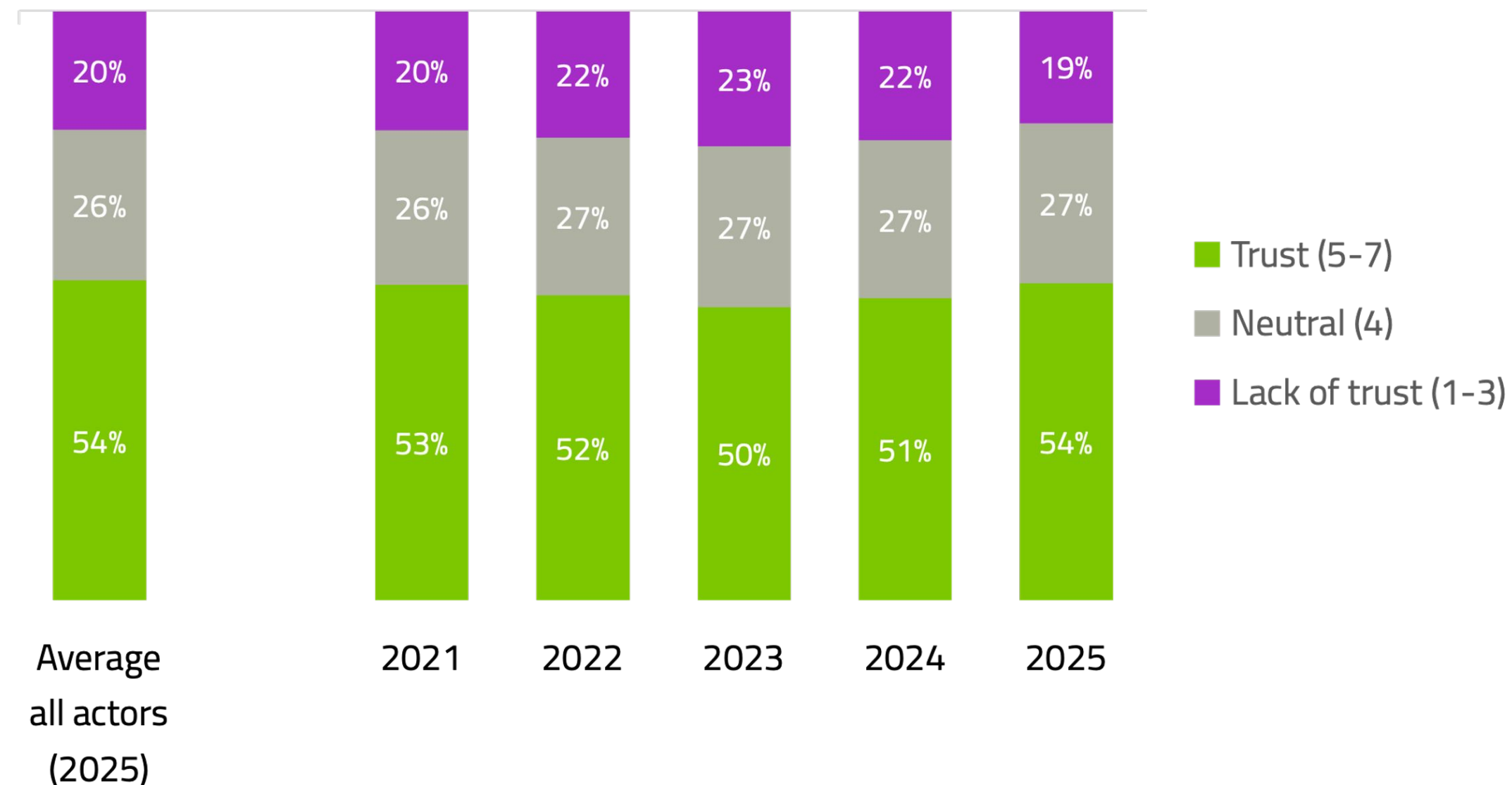
- Previous research has established that agricultural careers have a reputation for being hard work, isolated, requiring low levels of education and offering poor financial opportunities. Farming is also seen as an inaccessible career due to a shortage of land.
- The research demonstrated that there are four main motivators for young people to consider agricultural occupations:
 - For some young people, agriculture represents an attractive opportunity to do good by contributing to a more sustainable food system and providing a critical service to society: food production.
 - Agricultural careers are also seen as providing a route into entrepreneurship. Owning a business is thought of as offering varied and independent work.
 - The opportunity to build a technical career in agriculture is also attractive to the scientifically minded. Technology and science are seen as reducing the physical labour involved in agriculture, while boosting its social status and intellectual demands.
 - For others, agricultural work provides a path to connect with nature and spend time outdoors with animals.
- Young people perceive farming as a highly skilled profession involving a high level of responsibility. While this deters some from pursuing a career in the sector, as they feel unequipped to manage high risks, changing policies and varied demands, it has also contributed to a strong sense of respect for farmers.
- The majority of citizens trust farmers and say they value and respect them; however, there is a contradictory belief that farmers are not respected or valued by society. Leveraging the public's positive perception of farmers to make agricultural careers more attractive requires this narrative to change. Exposing young people to inspiring, modern role models within the sector, alongside a supportive and reliable policy environment that reduces long-term risk, are critical first steps.
- Further insights and recommendations are available in the *Securing the Future of Farming* report.

[Learn more about the future of farming.](#)

Trust in retailers has increased consistently since 2023

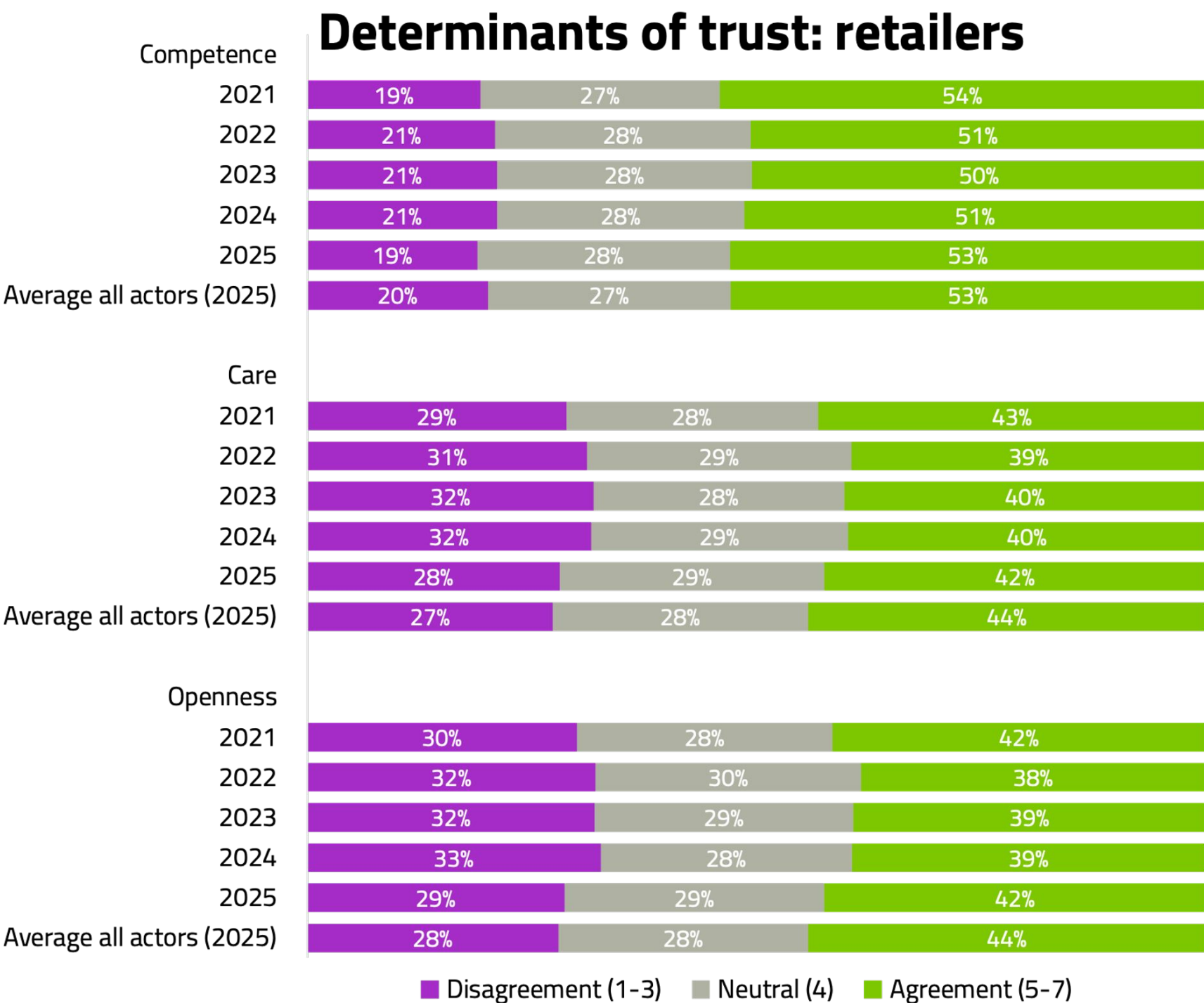
Trust in retailers declined after 2021, reaching a low point in 2023. Since then, it has increased steadily each year, with 54% of consumers expressing trust in retailers in 2025. Current trust in retailers (54%) is equal to the average level of trust in food system actors.

Trust in retailers



Retailers' scores show a consistent recovery, approaching the all-actor average.

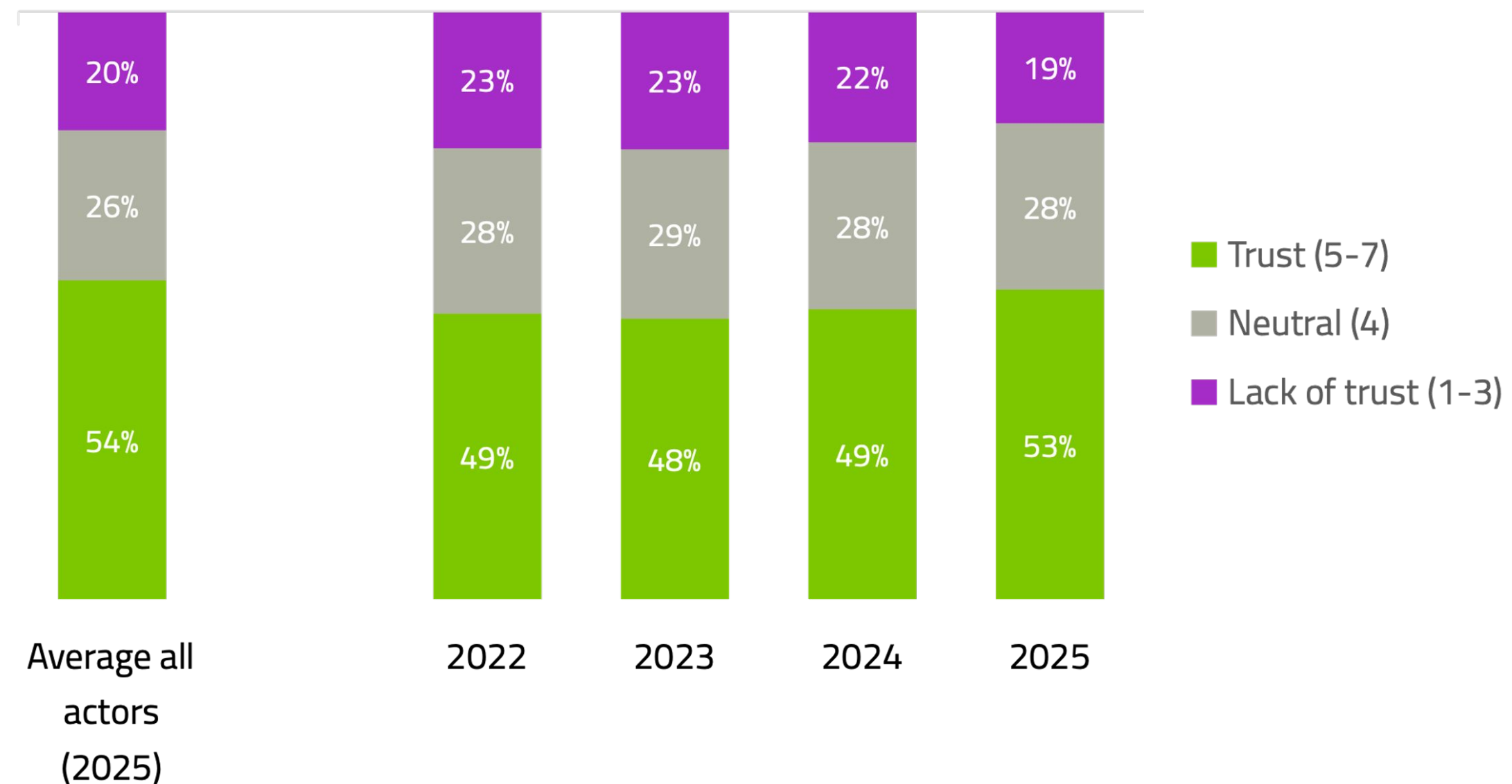
- The score for competence declined slightly from 54% in 2021 to 50–51% in 2023–2024, followed by a modest recovery to 52% in 2025, remaining just below the all-actor average (53%).
- The score for care dropped sharply after 2021, falling from 43% to 39% in 2022, but has since recovered to 44% in 2025, matching the all-actor average.
- Openness shows the strongest improvement: after declining from 42% in 2021 to 39% in 2023, perceptions of retailers' openness rose to 42% in 2025. This brings the score close to the all-actor average (44%) and represents the most positive upward trend across the three dimensions.



Trust in restaurants and caterers has increased to above average rates

Trust in restaurants and caterers* has seen a sharp increase from 2023 to 2025, jumping from 48% to 53%. For the first time, trust in these actors has surpassed the average level of trust in food system actors.

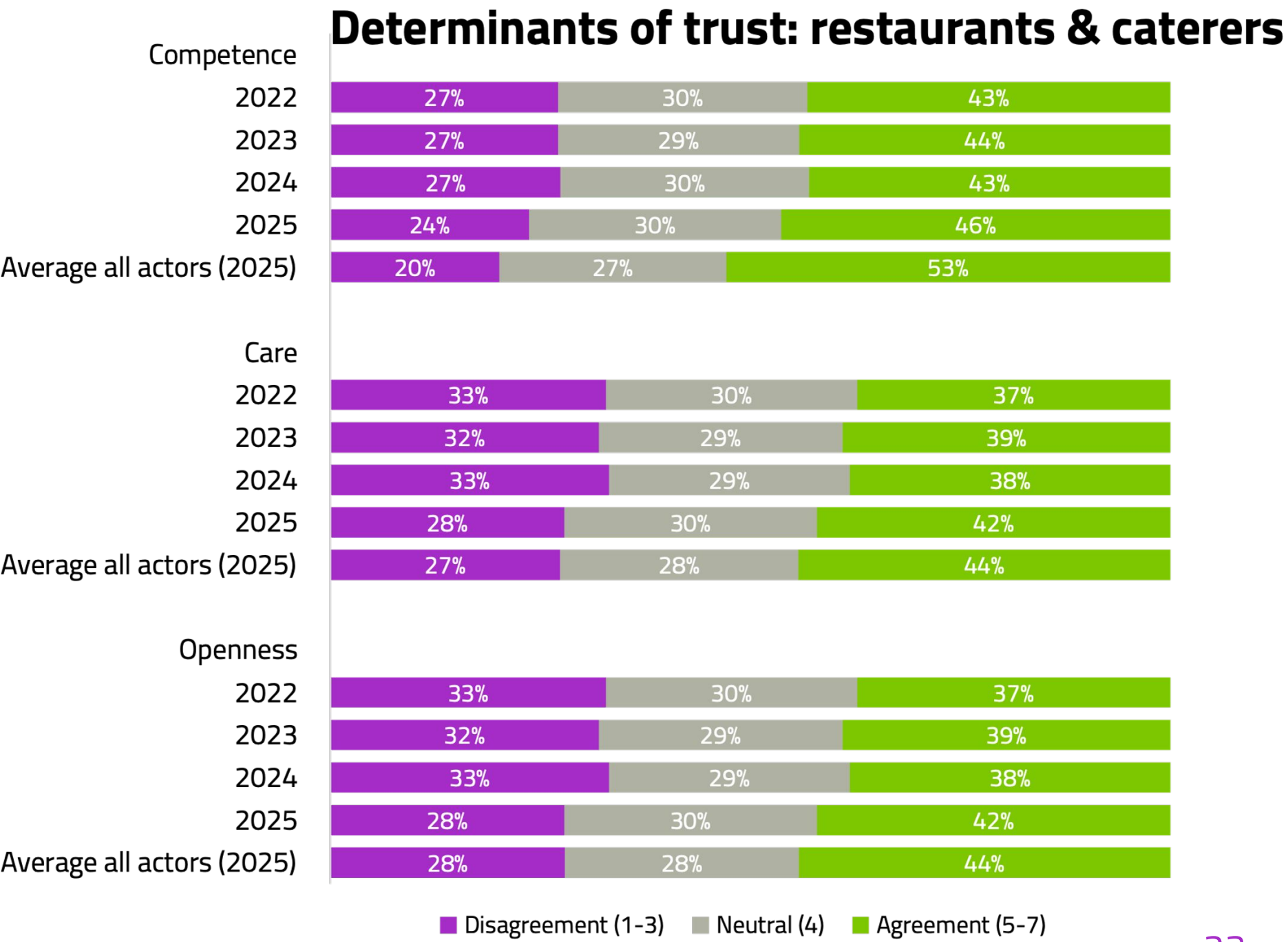
Trust in restaurants and caterers



* This group of food chain actors was only added in 2022, hence no earlier data is available

Scores for restaurants and caterers show strong improvement across all determinants of trust.

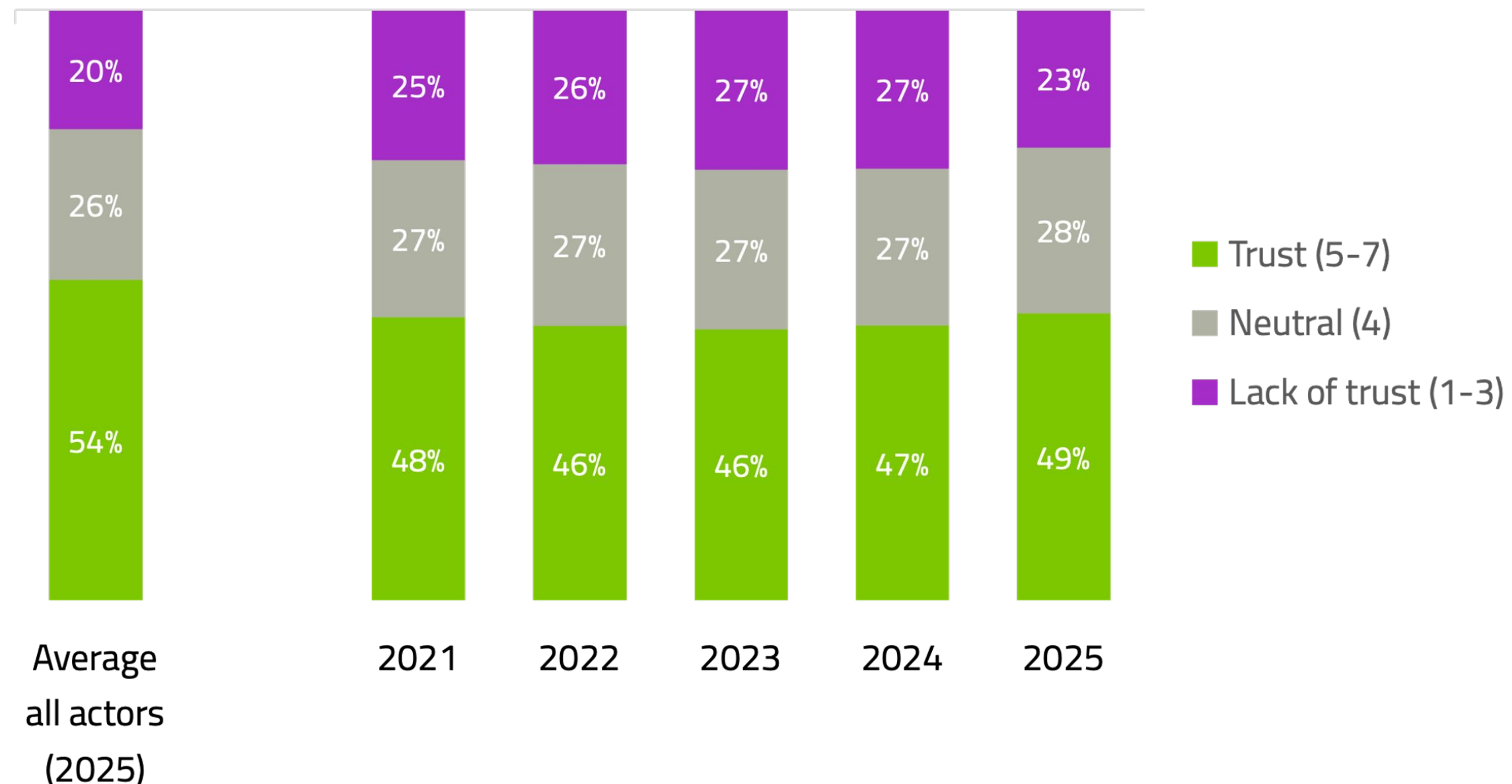
- Scores for the competence of restaurants and caterers rose gradually from 43% in 2022 to 46% in 2025, indicating a clear upward trend and narrowing the gap with the all-actor average (53%), although remaining clearly below it.
- Care remained relatively stable at 37–38% between 2022 and 2024, followed by a noticeable increase to 42% in 2025, moving closer to – but still below – the all-actor average (44%).
- Openness shows the strongest progress: rising from 37% in 2022 to 42% in 2025, narrowing the gap with the all-actor average (44%) and demonstrating a steady recovery.



Trust in manufacturers is slowly increasing, but still below average

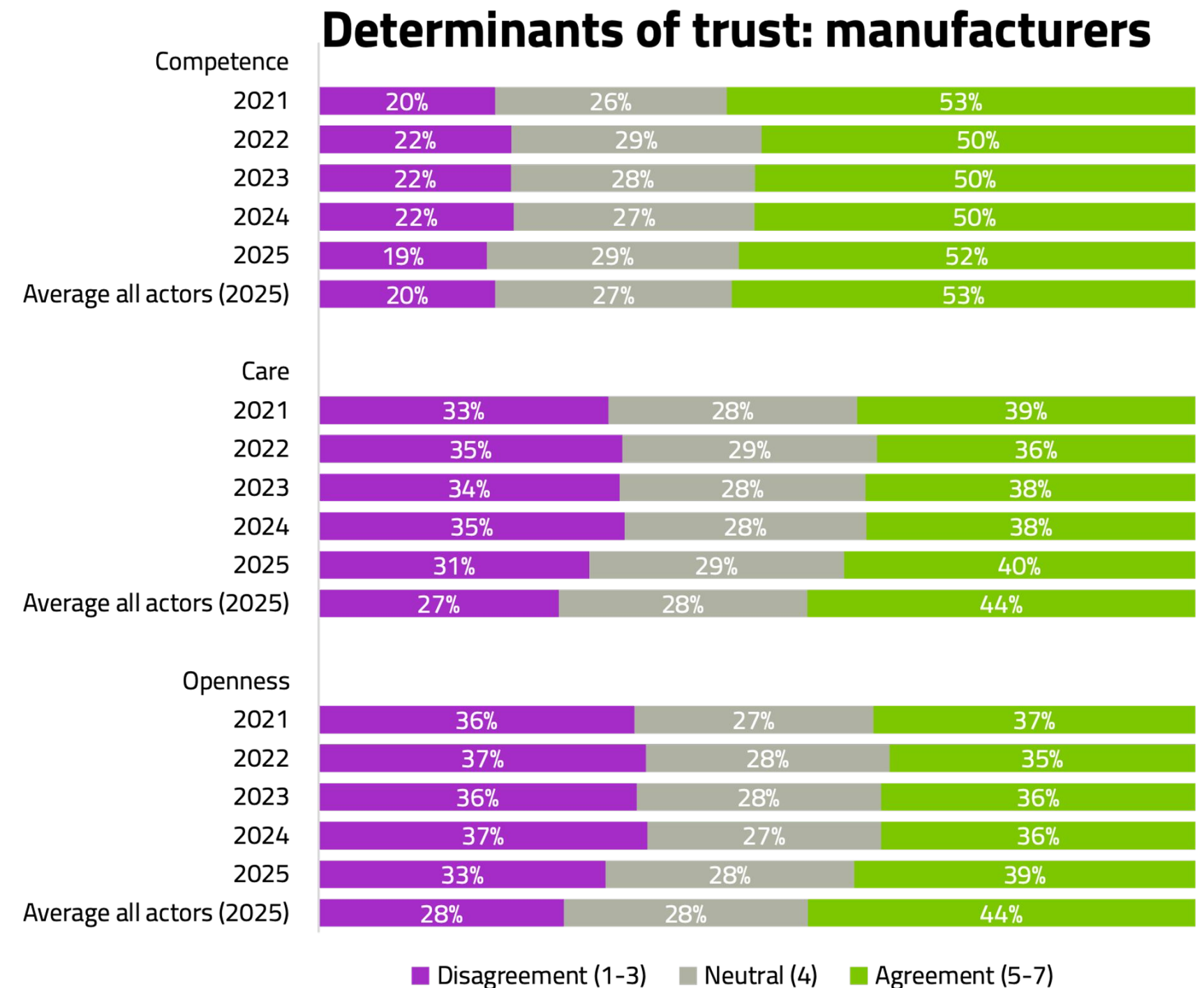
Trust in manufacturers remains low and below average yet is seeing some improvement compared to previous years. Trust levels remain consistently below 50%, with the 2025 value landing at 49% of consumers expressing trust in food manufacturers.

Trust in manufacturers



Manufacturers show modest improvement, but scores for care and openness remain well below the all-actor average

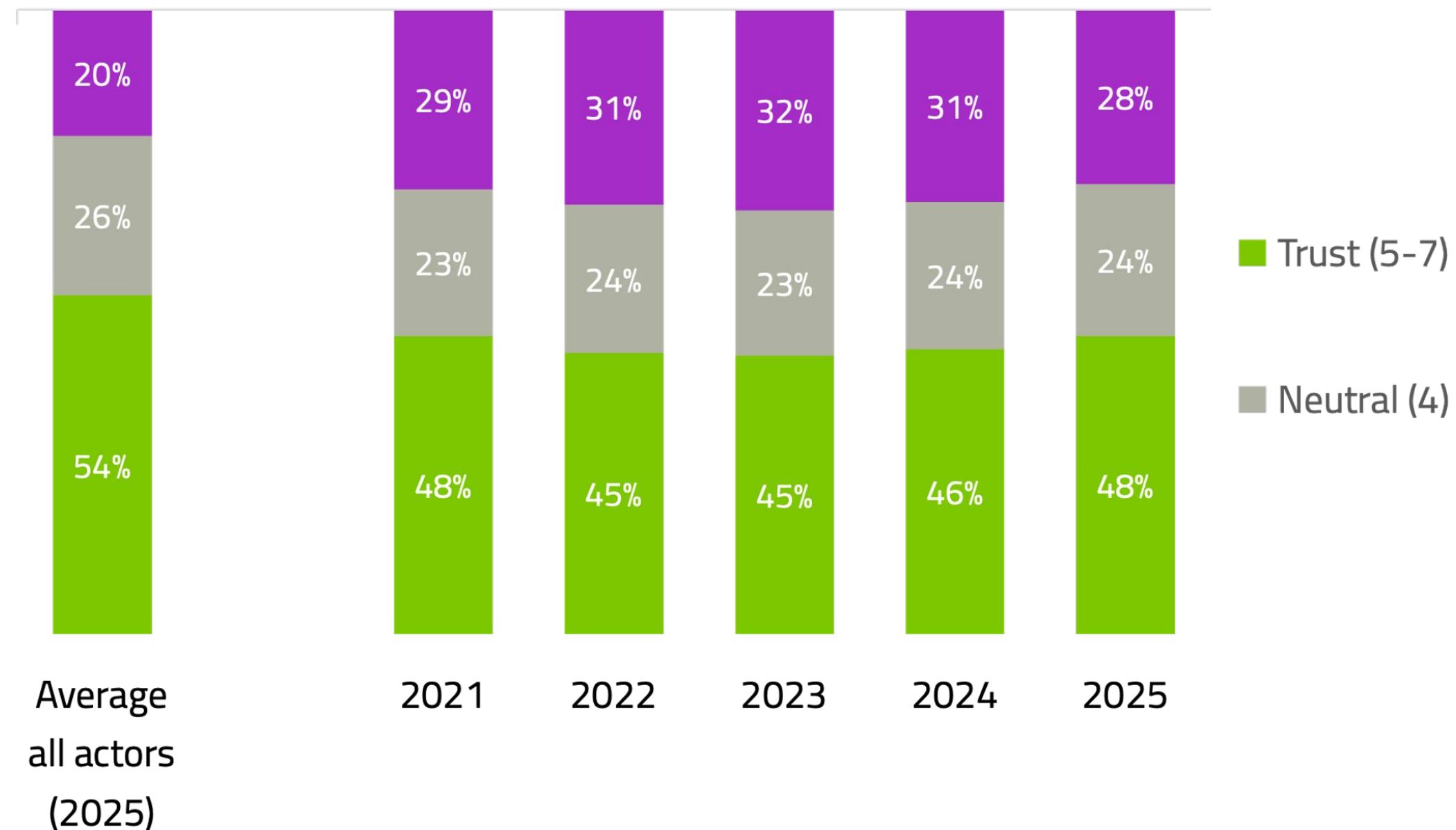
- Perceptions of manufacturers' competence remain stable at a solid level (50–53%) throughout 2021–2025, with a renewed uptick to 52% in 2025, signalling that consumer confidence in manufacturers' capabilities is recovering after earlier dips.
- Care improves from its low point in 2023–2024 (35–36%) and rises again in 2025, indicating early momentum towards rebuilding perceptions of responsibility and consumer-centric behaviour.
- Openness shows a steady upward movement from 36% in 2023 to 39% in 2025, marking the clearest improvement across the determinants and suggesting that efforts to enhance transparency are beginning to resonate with consumers.



Trust in authorities may be recovering from a dip

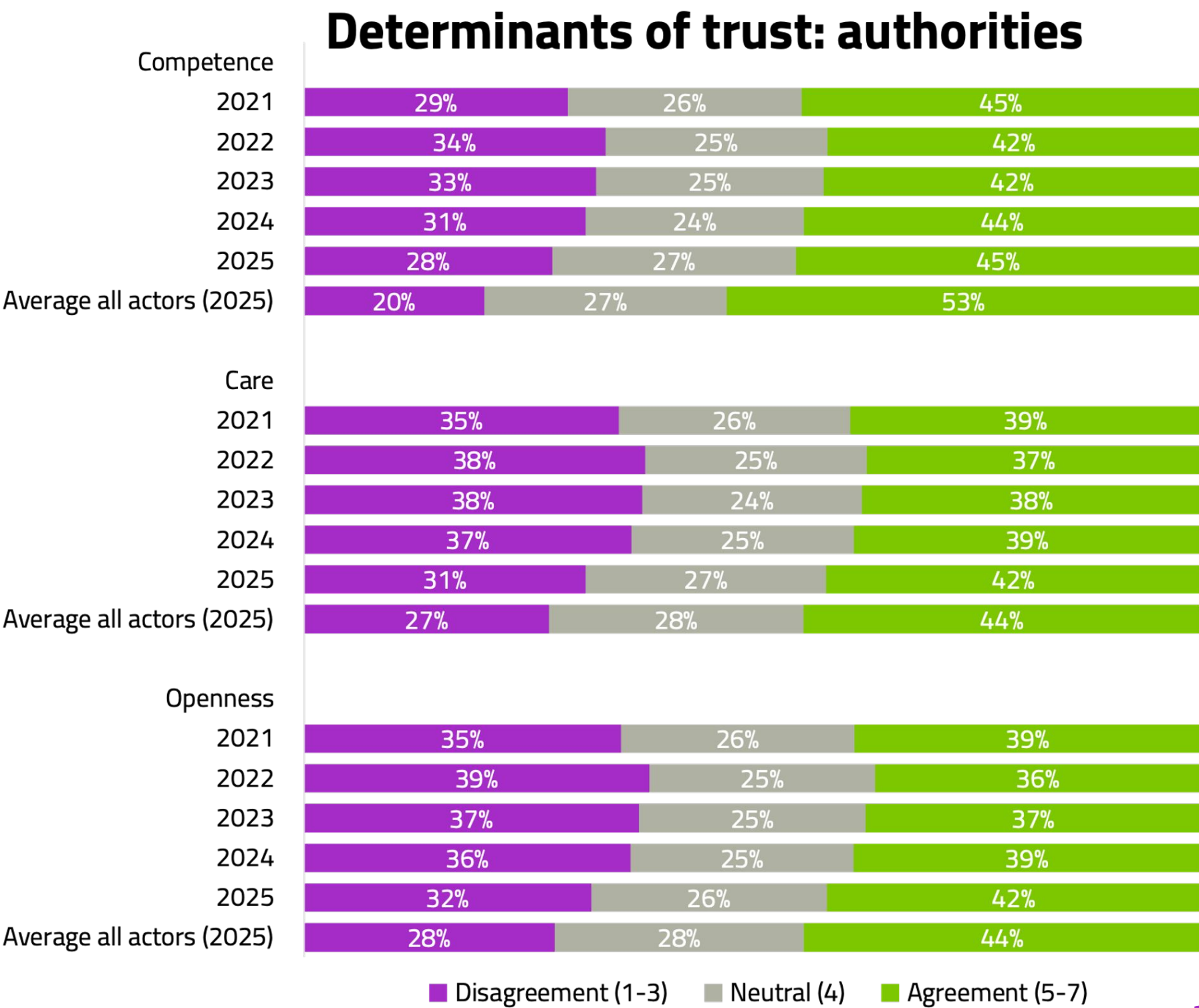
Trust in authorities is low but is increasing from an all-time low in 2023 at 45%. In 2025, 48% of consumers indicate trust in food system authorities. Yet, trust in authorities is consistently below the average of all food system actors.

Trust in authorities



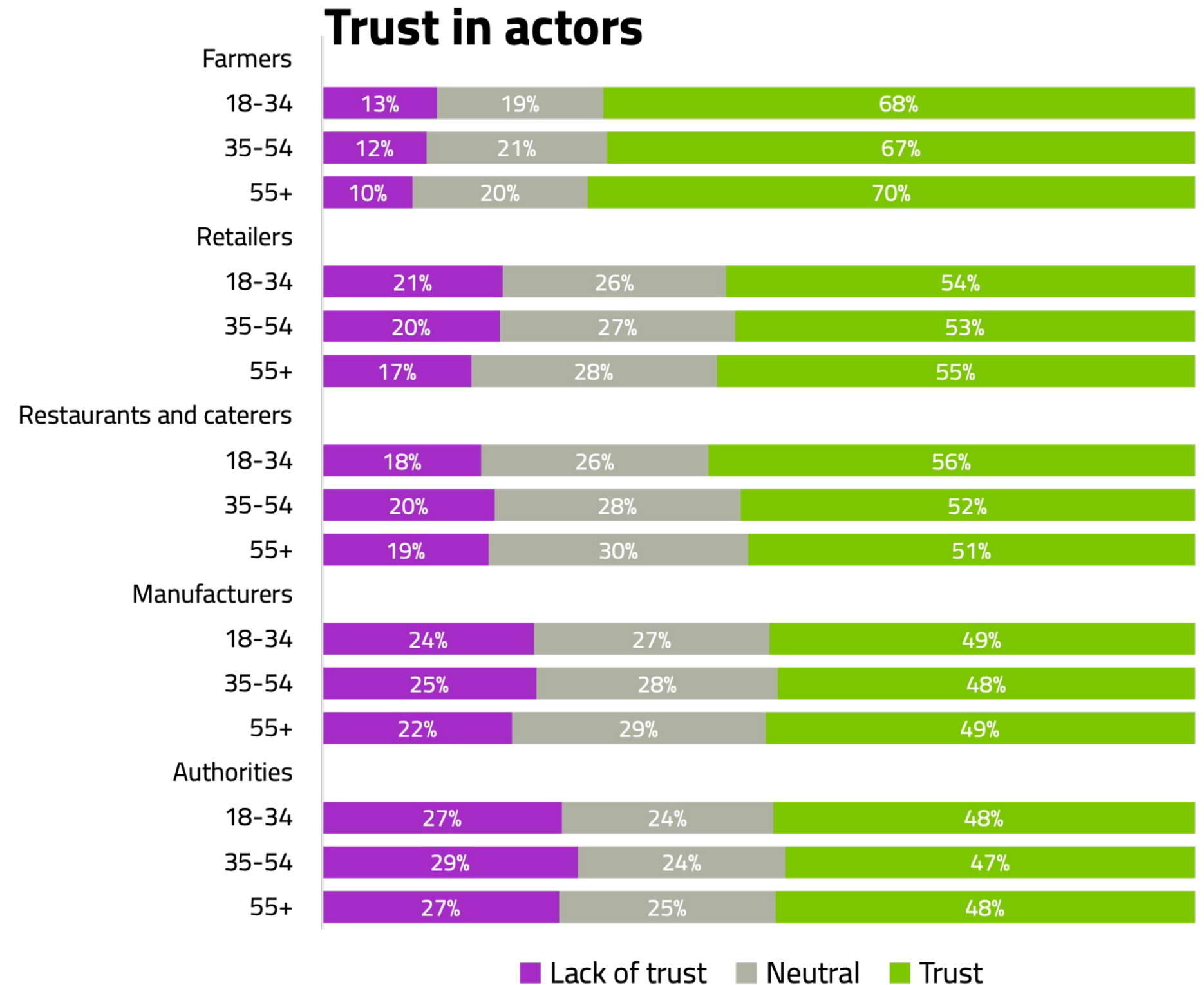
Authorities show encouraging recovery in competence, care and openness

- Competence shows a clear upward trajectory from a low point of 42% in 2023 to 46% in 2025, marking two consecutive years of improvement and narrowing the gap with the all-actor average (53%). Despite this progress, competence remains well below the all-actor average.
- Care rebounds after a dip in 2022–2023, rising from 37% to 42% in 2025, suggesting that perceptions of authorities’ intentions and sense of responsibility are moving in a positive direction.
- Openness represents the strongest area of progress: after remaining at 36–37% between 2022 and 2024, it increases to 42% in 2025, bringing authorities much closer to the all-actor benchmark (44%) and signalling improved transparency.



Trust in actors is fairly consistent across age groups

- Demographic groups do not deviate much from one another when it comes to their trust in food system actors.
- Farmers are trusted most by the 55+ demographic. Over 70% indicate trusting this actor.
- Restaurants and caterers are most trusted by the youngest consumer group, at 56%.



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](#).



