2025 CONSUMER FOOD TRENDS REPORT

From Price to Purpose

FOOD INDUSTRY EXECUTIVE

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2025

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Executive Summary

As consumer preferences in the food and beverage industry continue to evolve, manufacturers face the challenge of meeting the shifting demands of different generations and income groups while staying ahead of emerging trends.

Our 2025 Consumer Food Trends Report reveals that while **price and taste remain dominant factors in purchasing decisions**, generational differences significantly shape consumer behavior. While younger generations (Gen Z and Millennials) are increasingly influenced by health trends, sustainability, and transparency, Gen X and older consumers demonstrate more traditional yet discerning preferences.

For food and beverage leaders, this report provides actionable guidance on targeting the right channels, meeting the health and sustainability preferences of younger consumers, and strengthening brand reputation through transparency and ethical practices. To stay competitive in a rapidly evolving market, food and beverage companies must align business strategies with consumer expectations — prioritizing innovation, adapting operational strategies, and investing in tools and technologies that allow them to meet the needs of an increasingly conscientious and diverse consumer base.

Key Insights

- **Ingredient awareness grows:** While protein content and natural ingredients matter most to consumers broadly, younger shoppers are more likely to value factors like non-GMO and organic certifications. Older generations show a more conservative approach, placing higher importance on nutritional fundamentals like low-sugar and low-sodium content.

- **Product discovery requires a multi-channel approach:** Three-quarters (75%) of Gen Z and 56% of Millennials discover new products on social media, making it a key channel for targeting these consumers. Meanwhile, traditional channels still resonate with older generations. Gen X, for instance, relies heavily on television ads (64%), and 20% of consumers aged 60 and older continue to engage with print advertisements and circulars.

- **Sustainability matters:** Younger consumers actively seek information on companies' sustainability practices through social media and are willing to pay premiums for sustainable products, while older generations show less interest. But animal welfare stands out as the leading sustainability concern for consumers overall.

- **Transparency builds trust:** Transparency in ingredients and sourcing is essential to building trust, especially among Millennials and higher-income consumers. But food safety incidents can severely damage brand loyalty, with 51% of consumers likely to stop buying from a brand after safety issues like recalls.

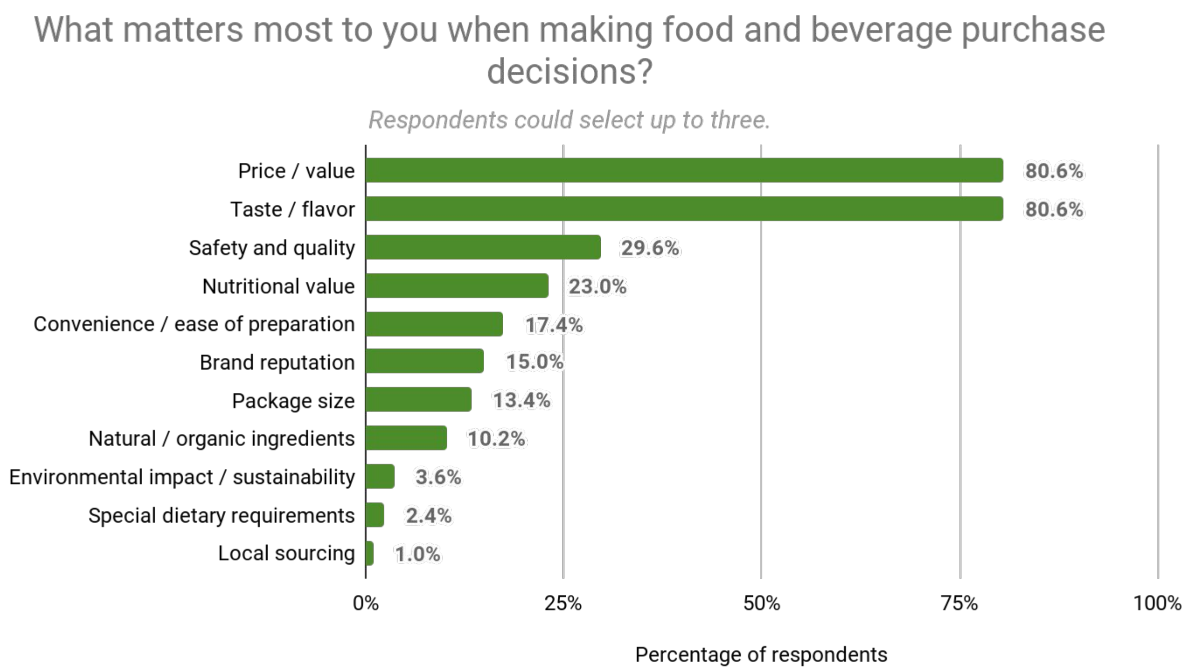
PART 1:

Product Selection & Discovery

Price and taste shape purchasing decisions, traditional supermarkets remain the go-to grocery destination, and in-store promotions and social media help consumers find new products.

Purchase decision influencers

When asked to select up to three factors that have the most influence over their food and beverage purchases, most consumers chose price (81%) and taste (81%) — these two factors tied for the top spot. Three in 10 shoppers feel safety and quality are important, and 23% consider nutritional value essential. Meanwhile, only a small percentage of consumers say sustainability (4%), dietary requirements (2%), and local sourcing (1%) matter most in their decision process.



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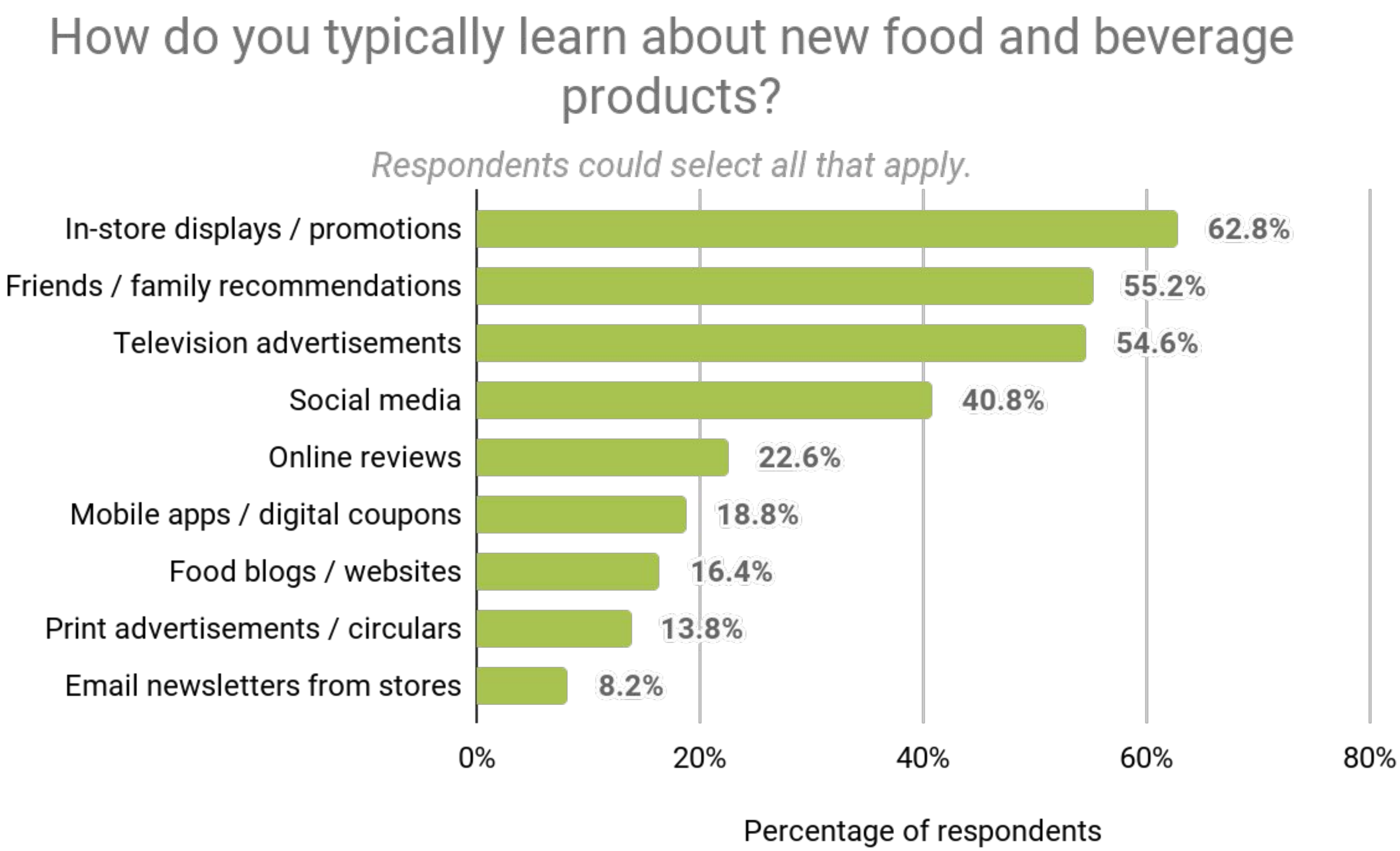
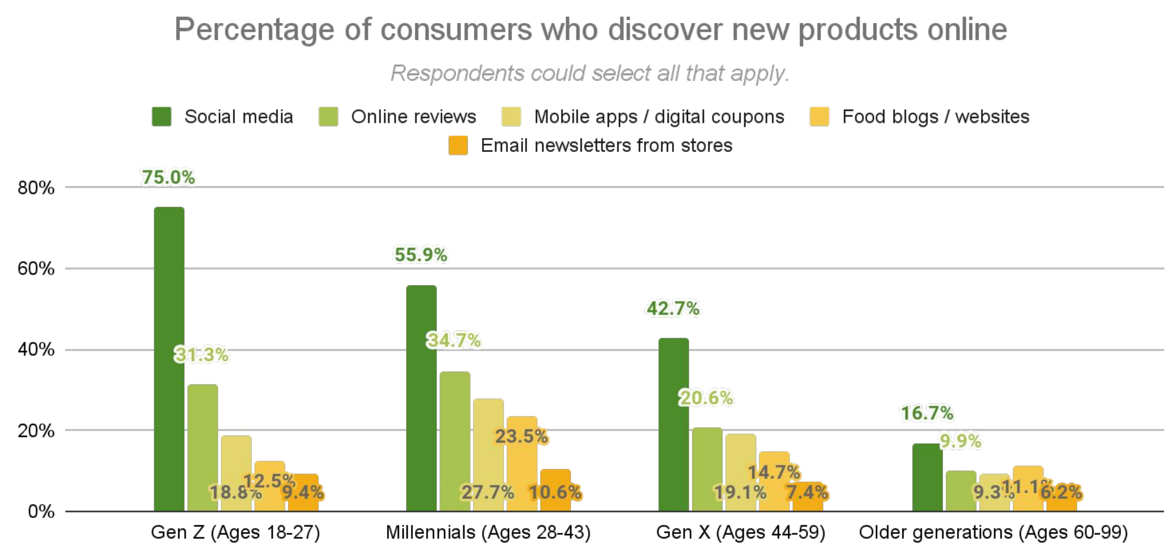
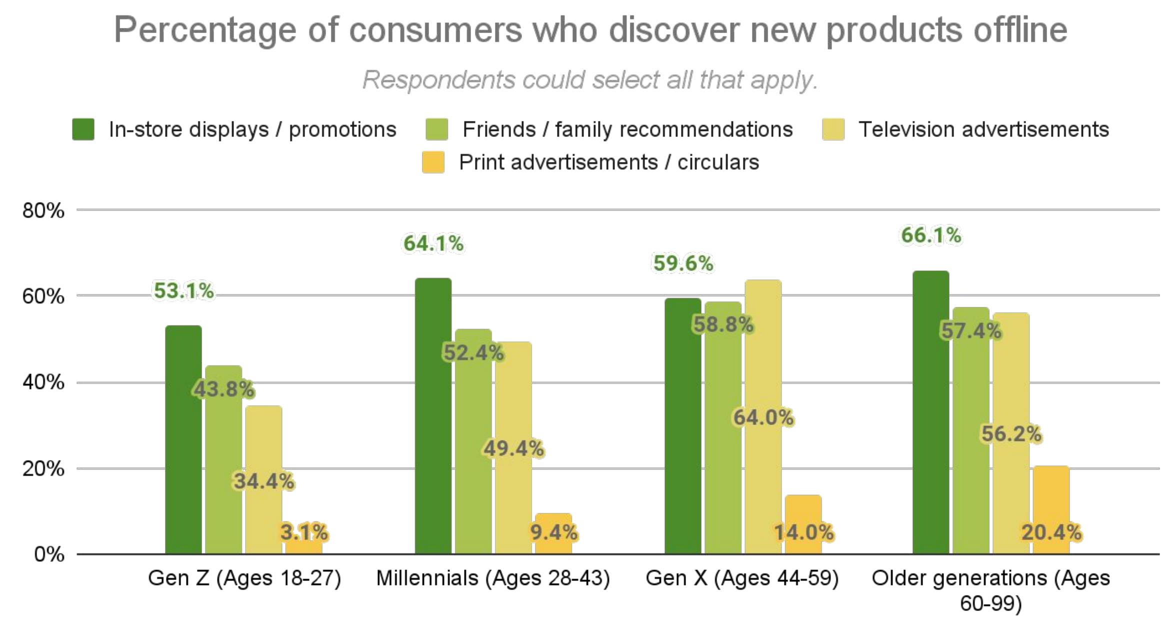
- Compared to respondents overall, Gen Z consumers are less likely to say taste / flavor is important (63%) and more likely to prioritize brand reputation (25%) and natural / organic ingredients (16%).
- A higher percentage of Gen X chose taste / flavor (87%) as a primary purchase driver.
- Taste (75%) ranks highest among consumers of higher household incomes ($100,000+), with price a close second (69%).
- Higher income consumers are also more likely to value nutrition (29%), brand reputation (22%), natural and organic ingredients (17%), and sustainability (8%).

Finding new products

Respondents overall say they're most likely to learn about new products via in-store promotions and displays (63%), followed by recommendations from friends and family (55%) and TV ads (55%). However, product discovery channels differed by generation (see next page).







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- Social media is by far the most influential channel for Gen Z, with 75% saying they learn about new products this way.
- Though in-store promotions are the top product discovery source for Millennials (64%), 56% find new products via social media.
- Television ads are most effective for Gen X, with 64% citing this as a source of information on new food and beverages.
- Two in 10 consumers (20%) aged 60 and older learn about new products through print advertisements and circulars, while younger consumers rarely discover products this way.
- Compared to consumers overall, parents with children under 18 are much more likely to find new products while browsing online reviews (35%), through mobile apps and digital coupons (24%), and on food websites and blogs (22%).

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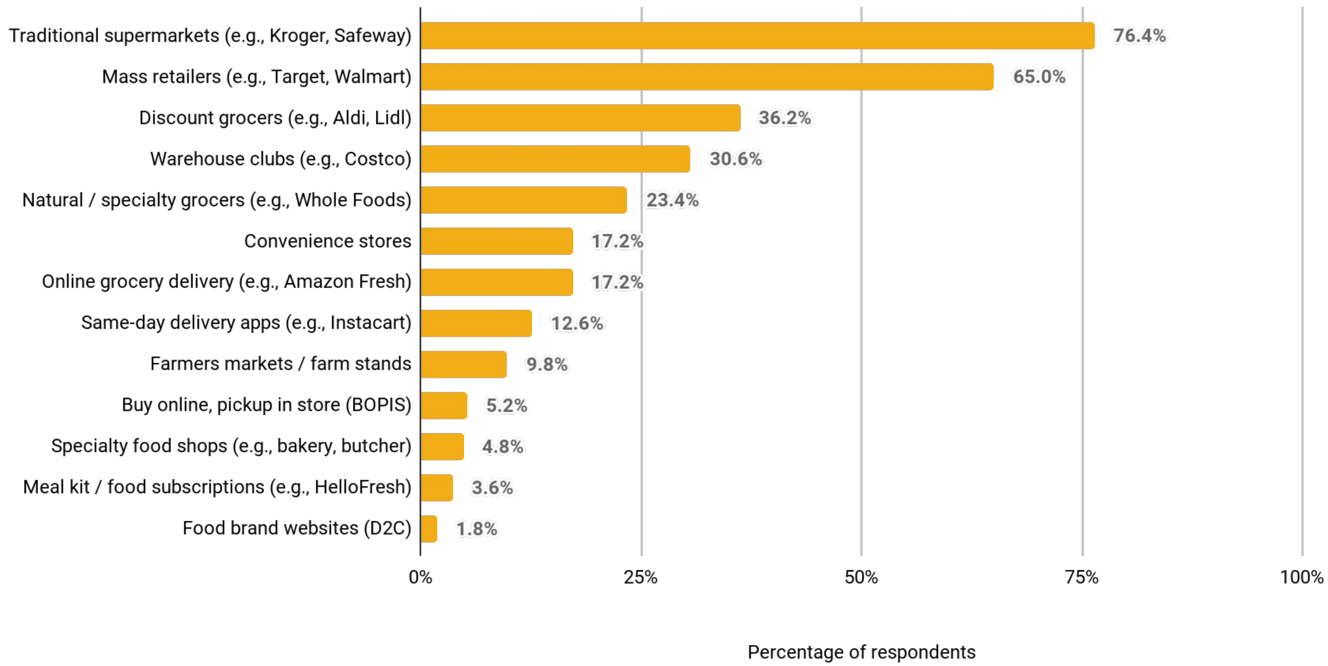
Grocery shopping destinations

The majority of consumers buy groceries from traditional supermarkets (76%) and mass retailers (65%), but discount stores (36%) and warehouse clubs (31%) are also popular destinations.

Where / how do you regularly purchase groceries?

Respondents could select all that apply.



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- Gen Z is more likely to shop at natural / specialty stores (47%), warehouse clubs (47%), and convenience stores (34%) than the general population. Many also report regularly using online grocery delivery (28%) and same-day delivery apps (25%).
- Millennials (31%) and parents (29%) are also strong users of online grocery delivery.
- More than half (51%) of higher income consumers use warehouse clubs to stock up on groceries.

FOOD INDUSTRY EXECUTIVE

PART 1:

Product Selection & Discovery

Recommendations for F&B leaders

- **Focus on affordability and quality:** Price is a key factor for lower-income consumers, while higher-income shoppers prioritize taste, nutritional value, and natural ingredients. Tailor product offerings and marketing strategies to different income segments by focusing on both affordability and quality.

- **Leverage social media and in-store promotions:** In-store promotions remain effective across all demographics, but Gen Z and Millennials frequently discover products via social media. To reach all age groups, build a multi-channel digital presence while maintaining traditional touchpoints.

- **Cater to convenience and shopping habits:** Offer online delivery options and ensure availability in both traditional supermarkets and specialty stores, especially for Gen Z and Millennials, who favor convenience and diverse shopping locations.

PART 2:

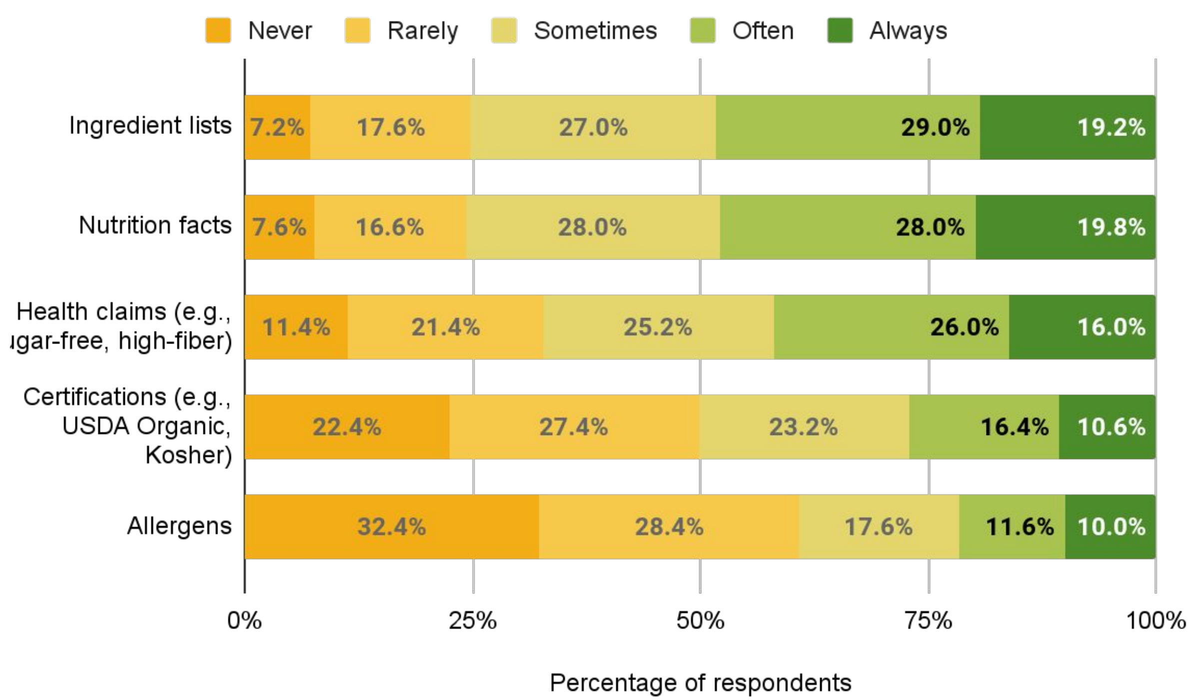
Health & Nutrition

Consumers show preferences for protein and natural ingredients, interest is growing in functional and plant-based ingredients, and younger consumers and parents are willing to pay premiums for health-focused products.

Food label information

When buying food and beverage products, many consumers are likely to check labels for ingredient lists and nutritional information — nearly half (48%) “often” or “always” look for this information.

How often do you check food labels for information about the following?



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- Certifications are more important to younger generations and higher income households — 34% of Gen Z, 31% of Millennials, 31% of parents, and 31% of higher income consumers “often” or “always” check food labels for certifications.
- “Often” or “always” checking labels for allergen information is more common among Gen Z (34%) and Millennial (27%) consumers, as well as parents (29%).

Diet types

Almost three quarters of respondents (73%) don't follow a particular diet type. A small percentage (6%) cite other dietary restrictions, including sugar-free or low-sugar, dairy-free or lactose-free, diabetic, and flexitarian. Just 3% follow a vegetarian diet and 1% identify as vegan.

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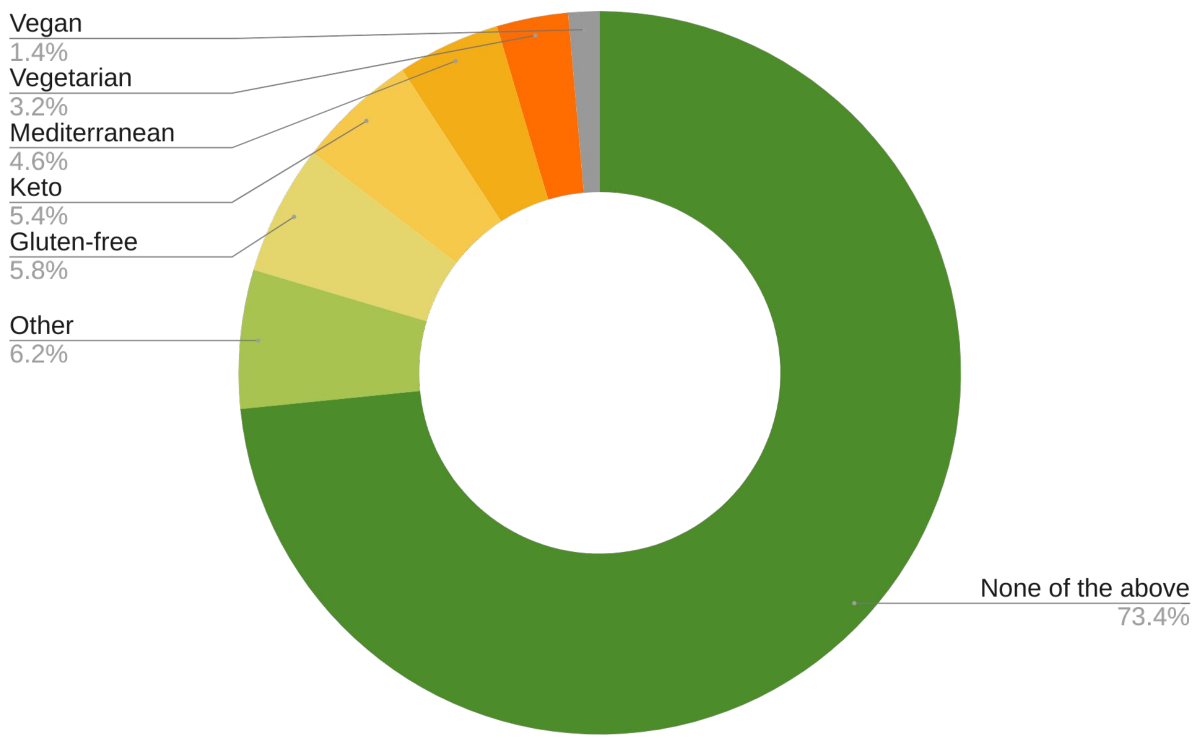
- Vegetarian diets are more common among Gen Z consumers (6%) and Millennials (5%), and 3% of Gen Z respondents follow a vegan diet.
- Keto is a slightly more common diet among Millennials and parents, with 7% of each group saying they've adopted this diet.
- More Gen Z respondents (13%), Millennials (9%), and parents (10%) follow a gluten-free diet.

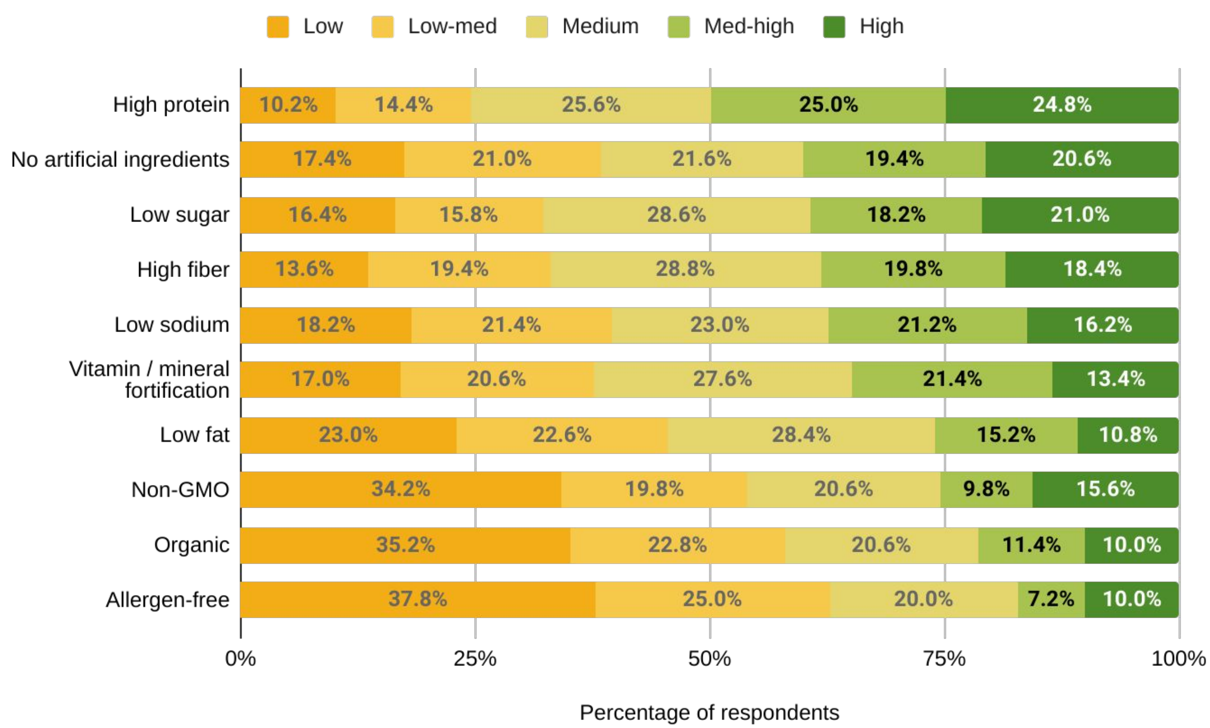
Which of the following diet types do you follow, if any?



Important health and ingredient factors

When buying food and beverage products, consumers rank high protein content, no artificial ingredients, and low sugar as the most important health attributes. They are less likely to consider factors like non-GMO, organic, and allergen-free as important.

How would you rate the importance of the following health and ingredient factors when buying food products?



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- Gen Z shoppers are more likely than the general population to rate non-GMO (25%), organic (19%), and allergen-free (13%) of "high" importance.
- Compared to the general population, consumers aged 60 and older place more value on low sugar and sodium — 30% say low sugar is of "high" importance, and 26% say the same about low sodium.
- Nearly 20% of parents say non-GMO ingredients and vitamin / mineral fortification are of "high" importance when buying food products, compared to 16% and 13%, respectively, of the general population.

Trending ingredients

About a third of consumers (33%) are interested in buying foods with functional ingredients (“likely” or “very likely” to buy), while 13% have already purchased or currently purchase such products. Many respondents are also “likely” or “very likely” to purchase foods with ancient grains (29%) and plant-based proteins (29%), and 10% and 9%, respectively, already purchase(d) such products. Interest in CBD-infused products and fermented foods is lower, with 56% and 48%, respectively, “unlikely” or “very unlikely” to buy these products.

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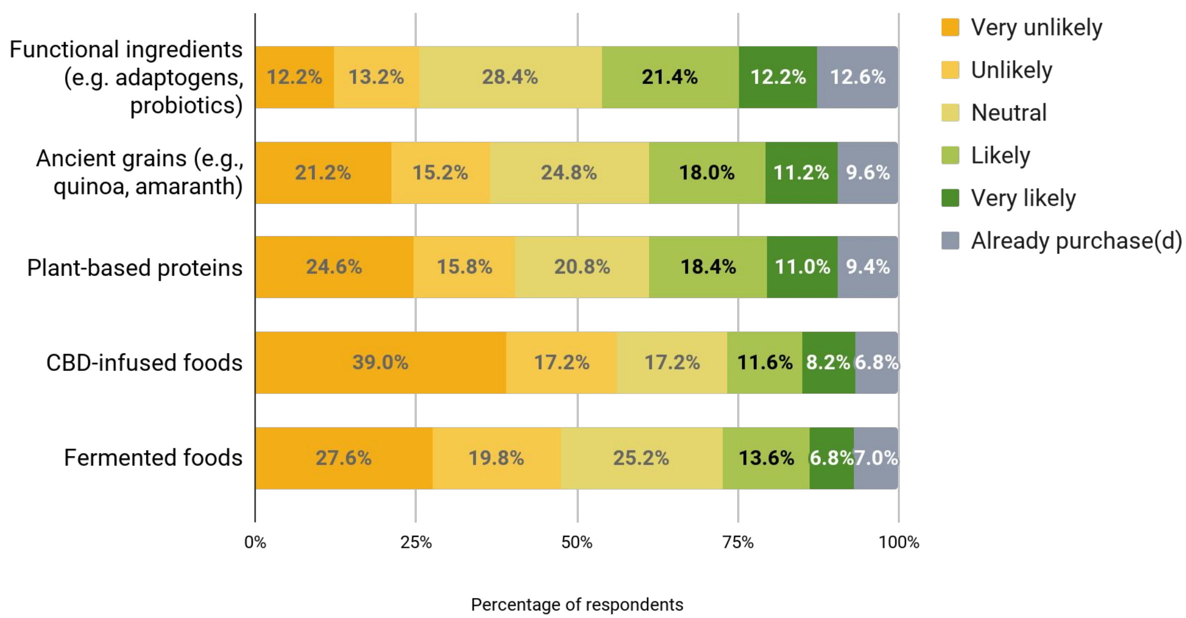
- More Gen Z consumers are “likely” or “very likely” to purchase fermented foods (44%) and CBD-infused foods (38%), and 16% are already buying foods with plant-based proteins.
- Many consumers aged 60 and older are “likely” or “very likely” to purchase foods with ancient grains (27%) and functional ingredients (25%), but express low interest overall in these ingredient trends.
- Compared to consumers overall, parents are more likely to have already purchased or currently purchase foods with functional ingredients (18%), plant-based proteins (15%), and ancient grains (13%), as well as CBD-infused foods (10%).

How likely are you to purchase foods with the following ingredients?



CBD interest declines, fermented foods show potential

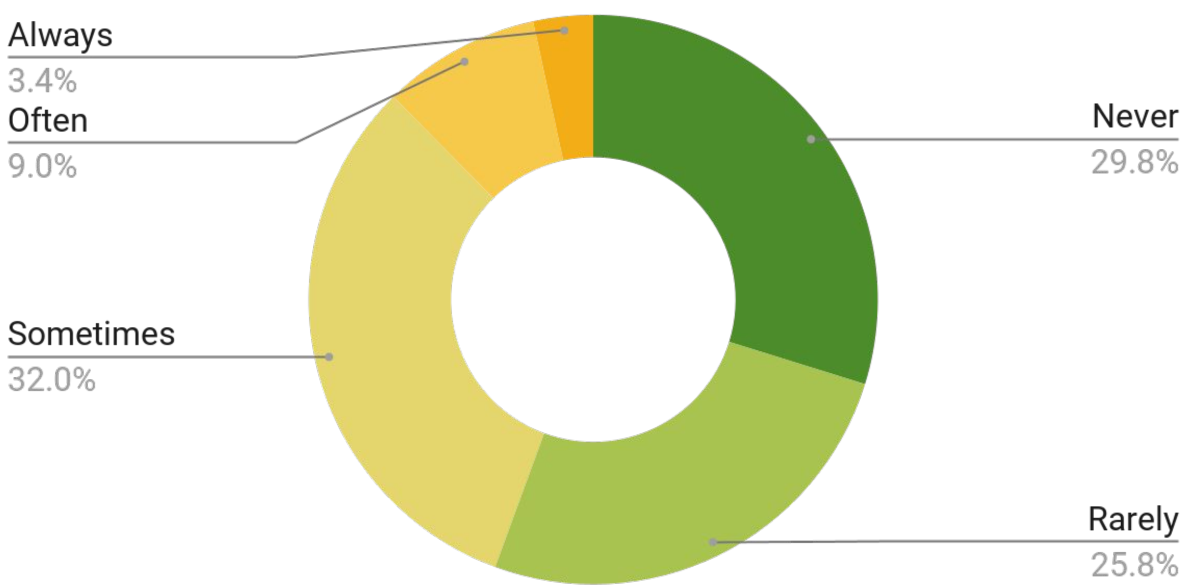
- **CBD craze runs its course:** Before the COVID-19 pandemic, CBD products experienced a surge in popularity, with CBD-infused snacks, beverages, and even pet treats rapidly hitting the shelves. Four in 10 U.S. adults were willing to try CBD back in 2019. However, interest seems to be waning in recent years, with many CBD startups closing their doors and companies shifting their investments toward more successful endeavors. Regulations, or a lack thereof, also complicated matters, along with consumer confusion and a lack of research to back CBD's benefits. Our data support the prediction that the CBD trend may be on its way out.

- **Younger consumers are early adopters of fermented products:** There's nothing new about the centuries-old fermentation process, but rising consumer interest in gut health and the development of technology like precision fermentation has the potential to take fermented foods and beverages to the next level. In fact, the market for such products is expected to reach 8.1% CAGR by 2034. However, our data suggest that younger consumers are driving interest and adoption of fermented products. Research from Cargill agrees — Gen Z and Millennial consumers are early adopters of products made through precision fermentation, and they're also more likely to pay a premium for such products.

Plant-based adoption

While 32% of all respondents report “sometimes” selecting plant-based alternatives to animal products, more than half (56%) “rarely” or “never” buy plant-based alternatives.

How often do you choose plant-based alternatives to animal products?



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- Younger consumers are most likely to choose plant-based — 56% of Gen Z, 55% of Millennials, and 56% of parents of children under 18 opt for plant-based at least sometimes.
- More than half (55%) of higher income households choose plant-based at least sometimes, while the percentage drops to 39% for lower income households.

What's holding back plant-based adoption?

- **Concerns about ultra processed foods (UPFs):** The amount of processing involved in plant-based alternatives is cause for alarm — 45% of consumers surveyed globally said they were quite worried about this and 46% were extremely concerned. Given the recent scrutiny over UPFs, reformulating plant-based products with recognizable — not chemical-sounding — ingredients will help alleviate consumer concerns.

- **Taste needs improvement:** Nearly a third (32%) of consumers cut back on plant-based spending because they weren't satisfied with the taste. And more than half (51%) of consumers globally said they don't eat plant-based alternatives because they prefer the taste of real meat.

Manufacturers of plant-based products will have to successfully deliver on taste and texture to win customers and encourage repeat purchases.

- **Cost challenges remain:** Even for consumers who would like to choose plant-based substitutes more often, the high cost of such products often causes them to stick with animal-based products or to buy more simple, plant-based proteins like beans and lentils. With inflation still heavy on consumers' minds, making plant-based alternatives more affordable is essential.

Trying alternative proteins

Plant-based products are by far the most popular choice within alternative proteins, with 36% of consumers “likely” or “very likely” to try them, while 11% have already tried plant-based options. Two in 10 consumers (20%) are interested in trying (“likely” or “very likely”) cultured meat products, and 15% would sample algae-based proteins.

Respondents show the most resistance to insect-based proteins, with 65% “very unlikely” to try them.

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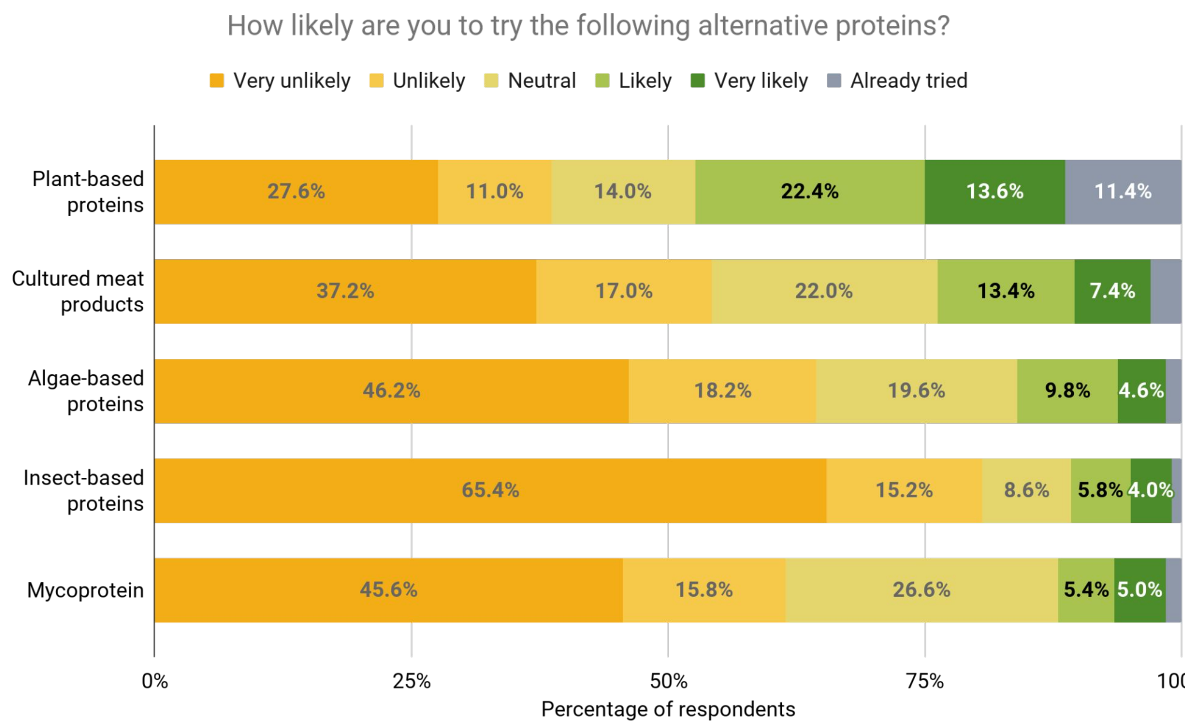
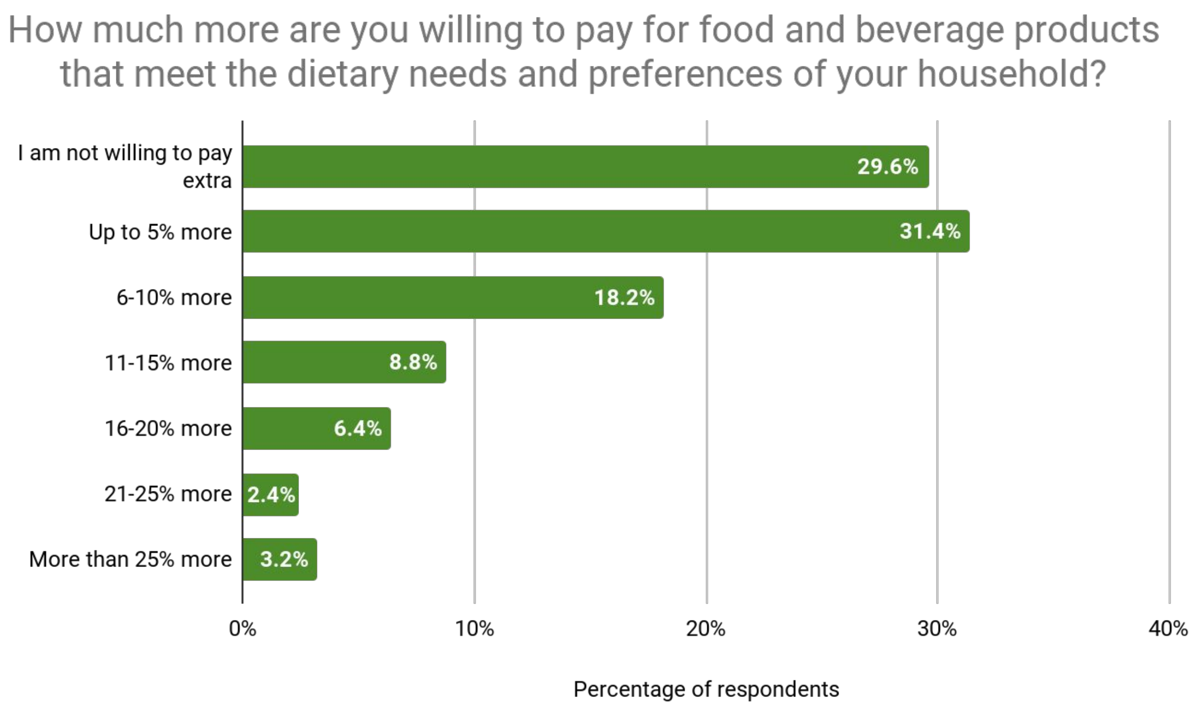
- Gen Z is a bit more open to testing insect-based proteins — 26% are “likely” or “very likely” to try such products, and 3% have already tried them. In addition, a quarter of Gen Z respondents (25%) expressed interest in trying mycoprotein.
- Compared to younger generations, Gen X and consumers aged 60 and older had little interest in trying these alternative proteins. However, a small percentage of Gen X (39%) and older generations (36%) said they were “likely” or “very likely” to try or had already tried plant-based proteins.



Willingness to pay for health factors

Almost a third of respondents (31%) would pay up to 5% more for products that meet their household's dietary needs and preferences, while 18% would pay 6 to 10% more. However, 30% are unwilling to pay extra.



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- Gen Z is most likely to pay more for products that align with their needs and preferences — 34% would pay up to 5% more, 25% would pay 6 to 10% more, 9% would pay 11 to 15% more, and another 9% would even pay 16 to 20% extra.
- Parents are also interested in paying more to meet their household's needs, with many willing to pay up to 5% more (33%), 6 to 10% more (21%), 11 to 15% more (13%), and 16 to 20% more (8%).
- Nearly half of respondents aged 60 and older (47%) said they wouldn't pay extra, making them the least likely group to pay more.

Despite inflation, consumers prioritize health

Concerns about inflations are gradually easing — 56% of consumers were extremely worried about inflation in November of 2024, down from a peak of 73% in June 2022. Nevertheless, high costs continue to fuel shopping behaviors like switching to less expensive brands and products, taking advantage of discounts and coupons, reducing spending on non-essential items, and dining out less often.

Consumers want food that is both healthy and affordable. But finding such products is a point of frustration, especially for consumers with tighter budgets. The International Food Information Council (IFIC) found that "healthfulness" impacted food and beverage purchasing decisions for 62% of consumers.

However, the more money consumers had to spend, the more important healthfulness became — 75% of consumers at the highest household income said healthfulness influenced how they shopped, while only 55% of those with the lowest income said the same.

PART 2:

Health & Nutrition

Recommendations for F&B leaders

- **Target plant-based and alternative protein preferences:** Younger consumers, especially Gen Z, are more likely to choose plant-based and alternative protein products. Companies planning to enter or continue in the alternative protein market can cater to this trend by expanding plant-based offerings and experimenting with new protein sources like algae and mycoprotein. Focusing on alternative protein sources consumers are most willing to try and buy — including plant-based and cultured meat — may be the safest approach, but companies will need to address concerns over the taste, costs, and processing of such products.

- **Highlight key health attributes and certifications:** Consumers prioritize ingredient and nutritional information, with Gen Z valuing certifications more. Food and beverage companies should prominently feature high-protein, low-sugar, and non-artificial ingredient claims, along with relevant certifications like organic or non-GMO, especially for younger audiences.

- **Consider pricing flexibility for health-conscious consumers:** Many consumers, particularly Gen Z and parents, are willing to pay more for products that meet dietary needs. Offering premium, health-oriented products at slightly higher prices can resonate with these groups, especially if they align with dietary preferences. However, even consumers who aren't willing or can't afford to pay more for healthier food value products with attributes like high protein, low sugar, and no artificial ingredients. These consumers are likely to buy affordable, healthy products when possible, particularly at supermarkets, mass retailers, and discount grocery stores.

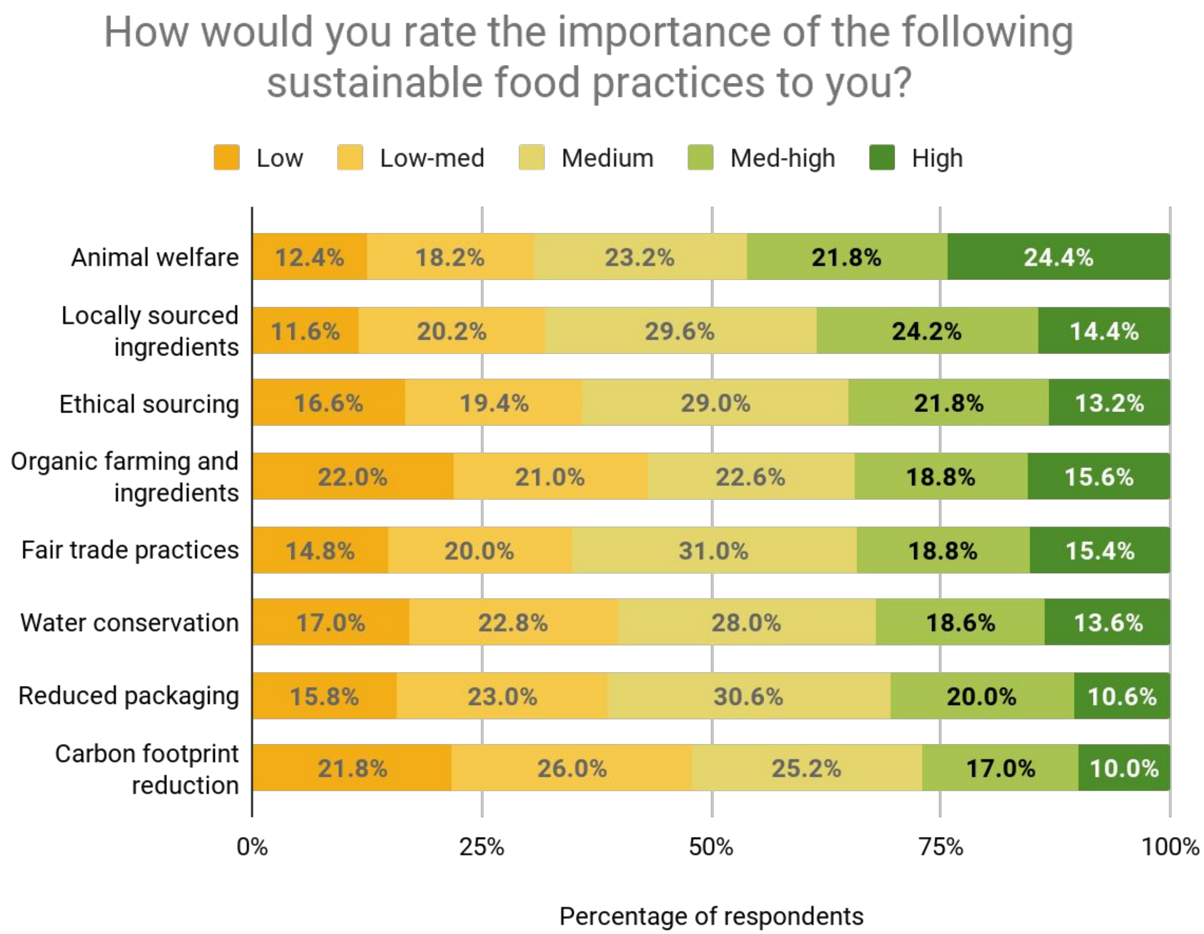
PART 3:

Sustainability

Animal welfare stands out as the leading sustainability concern for consumers, younger generations turn to social media for information on sustainability practices, and Gen Z is willing to pay extra for sustainable products.

Importance of sustainability initiatives

The most important sustainability practice to consumers overall is animal welfare. Almost half of consumers (46%) say animal welfare is of “medium-high” or “high” importance, followed by locally sourced ingredients (38%) and ethical sourcing (35%). Meanwhile, 48% respondents rate carbon footprint reduction lower in importance (“low” or “low-medium”).



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- One in four Gen Z consumers (25%) rank organic farming and practices of “high” importance. This generation is also more likely than consumers overall to say fair trade practices (19%) and water conservation (19%) are of “high” importance.
- Higher income consumers are more likely to rate the importance of reduced packaging as “high” (14%) or “medium-high” (28%), compared to the general population.
- Roughly two in 10 parents say fair trade practices (21%), organic farming and ingredients (20%), and water conservation (19%) are of “high” importance.

Learning about sustainable practices

The most common place consumers learn about a brand's sustainability practices is on product packaging (21%), while 14% find out on social media and 11% get information from news articles. However, 35% of respondents aren't actively looking for this information.

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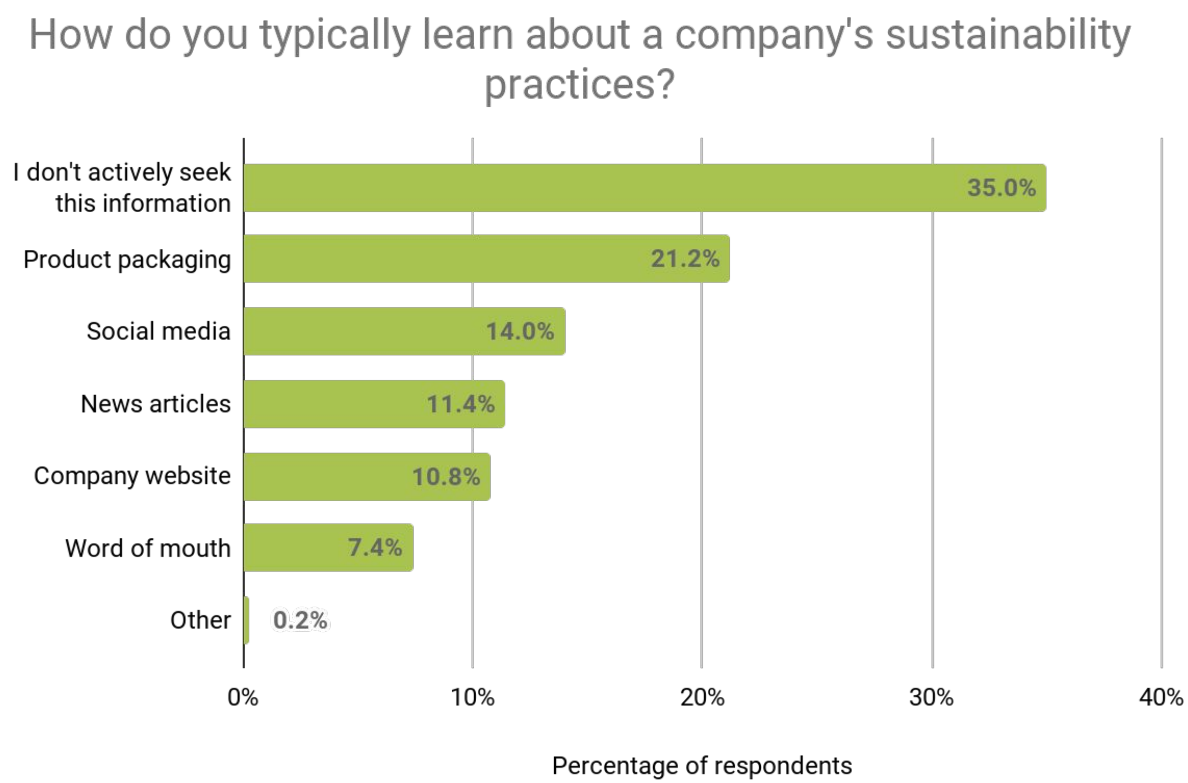
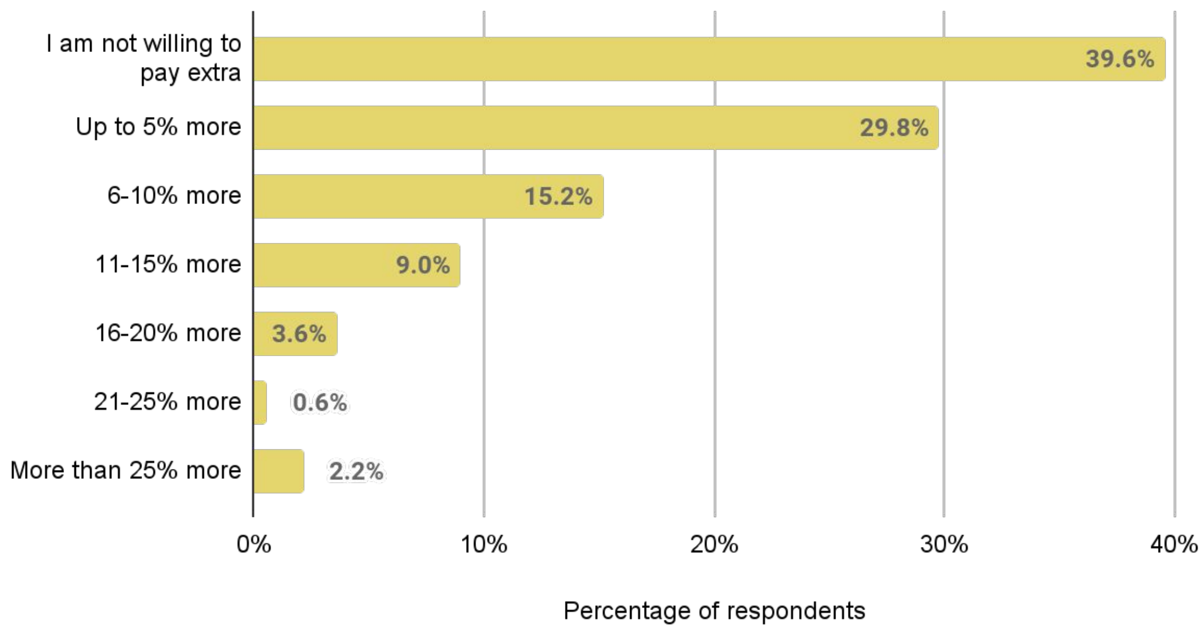
- Nearly a third of Gen Z respondents (31%) learn about company sustainability practices via social media. Only 9% of this generation doesn't actively seek sustainability information.
- A third of Gen X (33%) and 54% of consumers aged 60 and older report that they don't actively look for sustainability information.
- Higher income consumers and parents are more likely than the general population to learn about sustainability practices through packaging (29% and 26%, respectively) and company websites (14% and 18%, respectively).



Willingness to pay for sustainability

Four in 10 consumers (40%) would not pay extra for sustainably produced food, but 30% would pay up to 5% more and 15% would pay 6 to 10% more.

How much more are you willing to pay for sustainably produced food?



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- Gen Z consumers are much more likely to shell out for sustainable food. More than four in 10 (41%) would pay 6 to 10% more, and 16% would pay 11 to 15% more. Only 19% of Gen Z consumers are not willing to pay extra.
- Notably, 4% of parents said they're willing to pay up to 25% more for sustainably produced food.

PART 3:
Sustainability

Recommendations for F&B leaders

- **Prioritize animal welfare and ethical sourcing:** F&B leaders should prioritize transparency in animal welfare and ethical sourcing, as these are key consumer concerns across all age groups and income levels. Invest in systems that provide clear information on ingredient sourcing and animal treatment, and prominently display relevant certifications. Consistent, transparent messaging builds trust, differentiates the brand, and appeals to conscientious consumers.

- **Leverage packaging and social media for sustainability messaging:** Consumers typically learn about sustainability practices from product packaging and social media.

  Brands should ensure these practices are clearly communicated on packaging (particularly for older generations) and through digital channels (to reach younger generations).

- **Appeal to Gen Z's willingness to pay for sustainability:** Gen Z is more willing to pay a premium for sustainable products, with 41% willing to pay 6-10% more. Brands targeting this demographic can price sustainably produced items slightly higher to capitalize on this willingness.

PART 4:

Trust & Food Safety

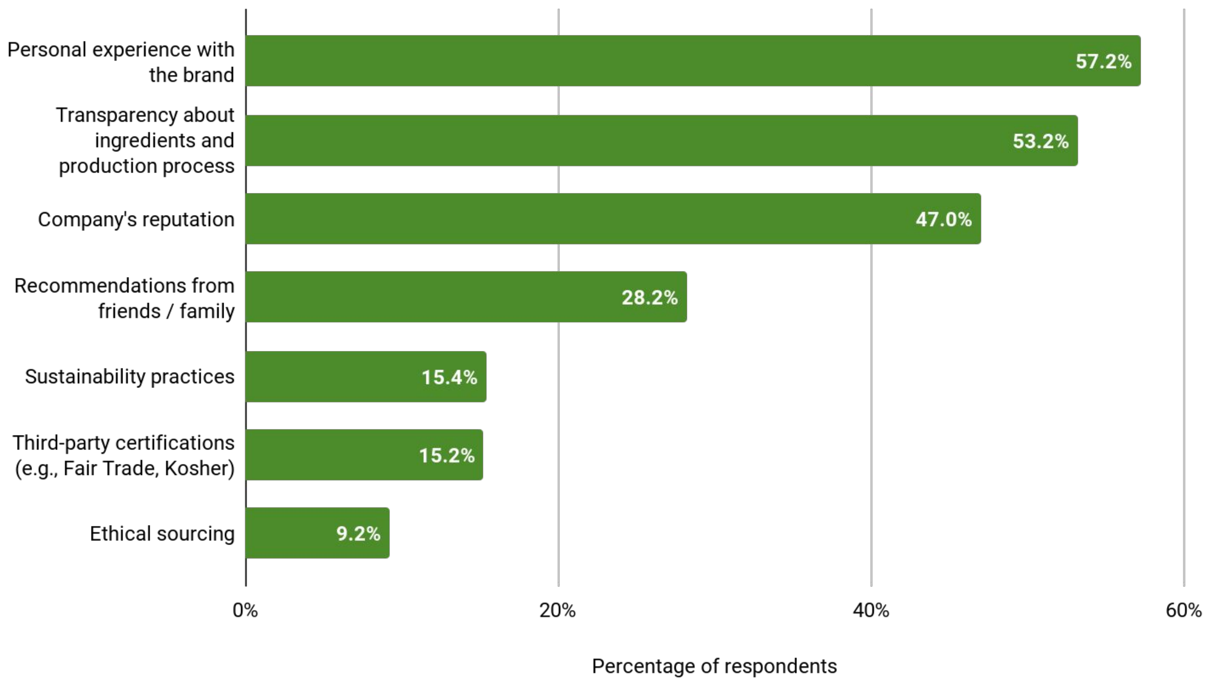
Word of mouth remains the most trusted source for food safety information, food safety incidents can severely damage brand loyalty, and younger consumers show particularly strong skepticism toward food manufacturers.

Trust building factors

Personal experience with a brand helps build trust for 57% of consumers. More than half (53%) say transparency about ingredients and production processes contributes to how much they trust a particular brand, and company reputation is a factor for 47%. Sustainability practices (15%), third-party certifications (15%), and ethical sourcing (9%) are much less likely to nurture trust.

What factors contribute most to your trust in a food brand?

Respondents could select up to three.



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- Transparency is the biggest trust builder for Millennials and consumers with higher household incomes, with 58% and 61%, respectively, selecting this as a top factor.
- Third-party certifications have a little more influence on brand trust for higher income consumers (22%) and Gen Z (19%).
- Two in 10 Millennials (20%) say sustainability practices contribute to their level of trust in a food brand, slightly above the share of the general population (15%) who say the same.

How food safety incidents impact buying behavior

Food safety issues like recalls risk losing consumer trust. More than half of respondents (51%) are “likely” or “very likely” to stop buying from a brand that experiences a food safety incident.

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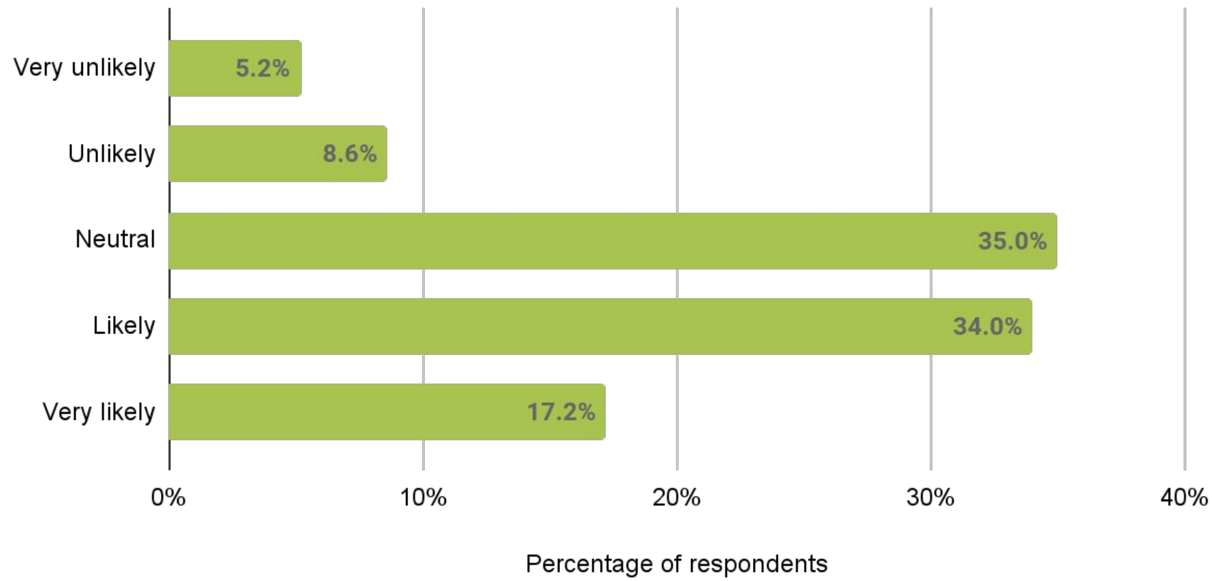
- Millennials and parents are even more likely to give up on a brand after food safety issues — 57% of Millennials and 58% of parents are “likely” or “very likely” to stop buying that brand’s products.

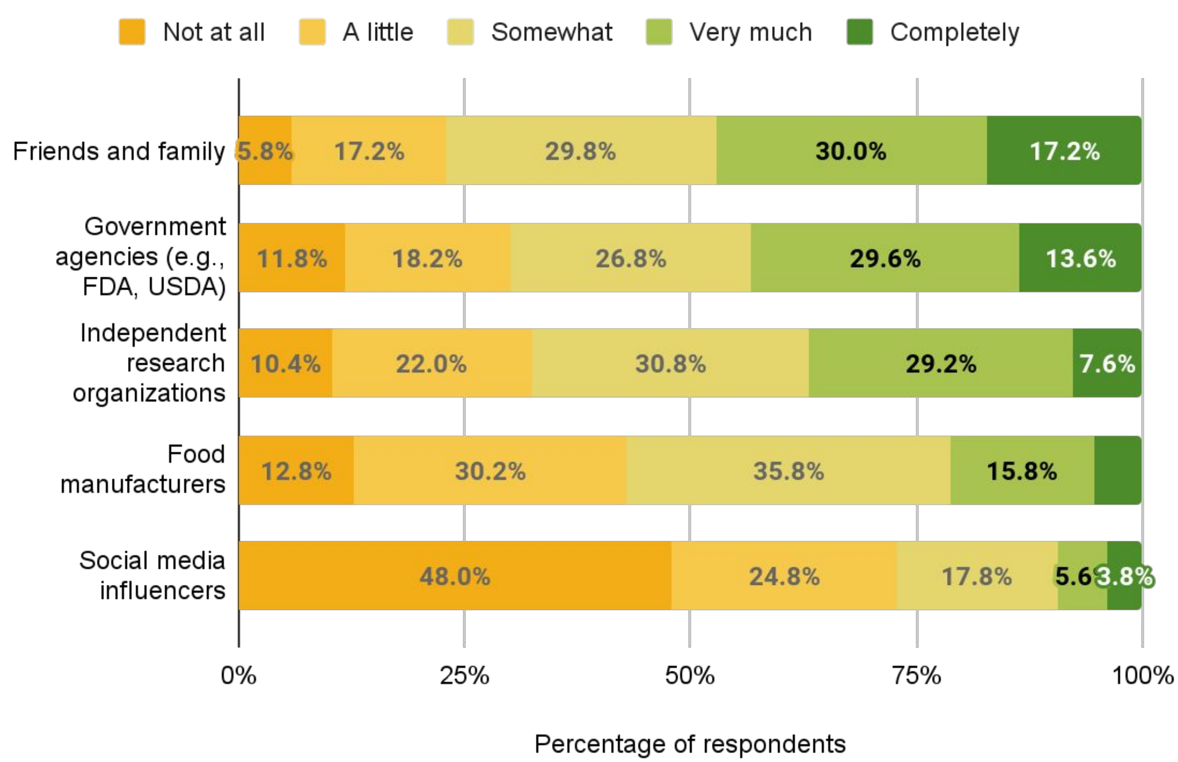
How likely are you to stop buying from a brand after a food safety incident (e.g., recall)?



Trust building factors

When it comes to information about food safety, respondents are most likely to trust their friends and family — nearly half (47%) trust them "very much" or "completely." Government agencies are the second most trusted source of food safety information, followed closely by independent research organizations. Only about two in 10 consumers (21%) trust food manufacturers "very much" or "completely," and 48% find social media influencers unreliable.

How much do you trust the following sources for food safety information?



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- Gen Z is particularly distrusting of food manufacturers when it comes to food safety, as only 12% trust them "very much" or "completely," and 22% don't trust them at all.
- About two-thirds of respondents aged 60 and over (67%) don't trust social media influencers at all.

PART 4:

Trust & Food Safety

Recommendations for F&B leaders

- **Address food safety concerns proactively:** Food safety incidents, like recalls, can significantly damage trust, with over half of consumers likely to stop buying from affected brands. Companies should prioritize strict safety protocols and communicate proactively during any issues to maintain consumer confidence.

- **Prioritize transparency and company reputation:** Consumers value transparency about ingredients and production processes as a top factor in building trust, especially Millennials and high-income consumers. Leaders should prioritize investment in food safety and traceability systems to foster stronger relationships with customers.

- **Leverage trusted sources for food safety:** Consumers trust friends, family, and government agencies the most for food safety information. Food and beverage companies should ensure they build credibility through these channels, as well as minimize reliance on social media influencers, who are generally viewed with skepticism. Encouraging positive customer reviews and referrals while engaging with communities can help build a company people want to talk about. In addition, companies can benefit from pursuing official certifications and approvals and implementing tools to improve transparency. Readily providing data about sourcing, manufacturing processes, and safety measures will back up claims and help consumers feel more comfortable with their food and beverage choices.

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Moving forward

The 2025 Consumer Food Trends Report reveals a rapidly shifting landscape that food manufacturers must navigate to stay competitive:

- While price and taste remain the top purchase drivers, younger consumers are increasingly prioritizing health, sustainability, and brand reputation.
- Gen Z and Millennials are particularly willing to pay more for products that meet their dietary needs and sustainability values, with 41% of Gen Z willing to pay 6-10% extra for sustainable food.
- Social media has become a key channel for product discovery, especially among younger shoppers, while traditional channels still resonate with older generations. However, when it comes to food safety, social media is the least trusted source of information.
- Trust is critical — food safety issues can quickly erode brand loyalty, underscoring the importance of transparency in ingredients and sourcing.

These insights highlight the importance of adapting to the unique preferences of younger shoppers, including leveraging social media for product discovery, and prioritizing sustainability and transparency to build lasting consumer trust.

Summary of findings by age group

Gen Z: Bold, Sustainable, & Socially Savvy

Gen Z is all about discovering exciting, sustainable foods via social media. They have a strong focus on health, plant-based options, and brand transparency.

- 75% discover new products through social media
- Nearly half shop at natural / specialty stores (47%) and warehouse clubs (47%)
- 56% choose plant-based alternatives at least sometimes
- Most open to alternative proteins (26% interested in insect-based proteins, 25% interested in mycoprotein)
- Most willing to pay a premium for health and sustainability
- Place higher importance on brand reputation, natural / organic ingredients, and certifications
- Only 12% trust food manufacturers “very much” or “completely” on food safety

Millennials: Health, Transparency, & On-Trend

Millennials prioritize health, plant-based choices, and transparency. They seek ethical and nutritious options, and often discover new products online.

- 56% discover new products via social media
- 64% find new products through in-store promotions
- 55% choose plant-based alternatives at least sometimes
- 57% are likely to stop buying from a brand after a food safety incident
- Highly value transparency in ingredients and production processes
- More likely to follow keto diet (7%)

Summary of findings by age group

Gen X: Flavor First, Value Always

Gen X values taste and flavor, finds new products through traditional means, and is cautious with new food trends.

- 87% prioritize taste / flavor when making food and beverage purchase decisions
- 64% learn about new products through TV ads
- Less interested in alternative proteins compared to younger generations
- Moderate interest in plant-based alternatives

Ages 60+: Tradition, Trust, & Simplicity

Older generations lean toward the familiar, seek low-sugar and low-sodium options, and trust traditional sources for food safety.

- Rely more on traditional media like TV ads and print advertisements
- 54% don't actively look for sustainability information
- 47% unwilling to pay extra for products that meet their dietary needs and preferences
- Low interest overall in ingredient trends, with highest interest in ancient grains and functional ingredients
- Place more value on low-sugar and low-sodium products
- Least likely to explore alternative proteins or trendy food options

Methodology

An online survey of 500 U.S.-based consumers was conducted in November 2024.

Respondents were categorized by age group, income level, and parental status:

- **Gen Z** included respondents ages 18 to 27, **Millennials** included respondents ages 28 to 43, and **Gen X** included respondents ages 44 to 59. The survey also included respondents aged **60 and over**. The share of respondents in each age group was as follows:
    - Gen Z: 6.4%
    - Millennials: 34.0%
    - Gen X: 27.2%
    - Aged 60+: 32.4%
- Respondents were considered **lower income** if they had a household income of less than $50,000. Respondents with a household income of $100,000 or more were considered **higher income**.
- **Parents** included respondents with children under 18 living in their household.

Thank You!

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