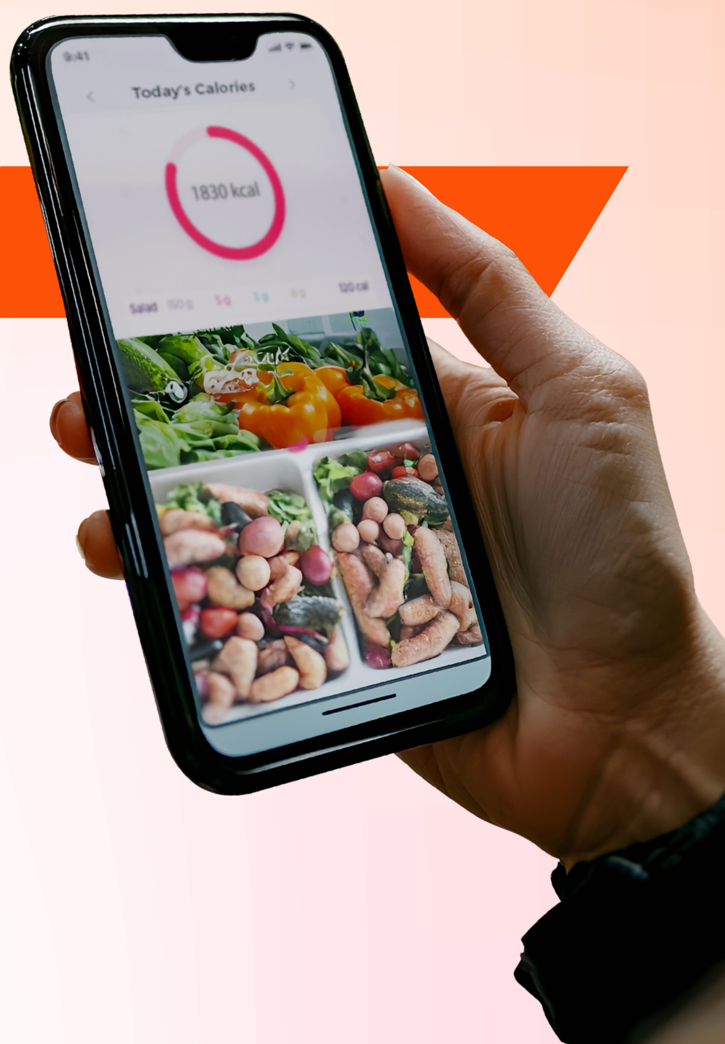
PwC's Voice of the Consumer 2025

A new recipe for the food industry

The future of food is aspirational, health-focused and tech-driven.



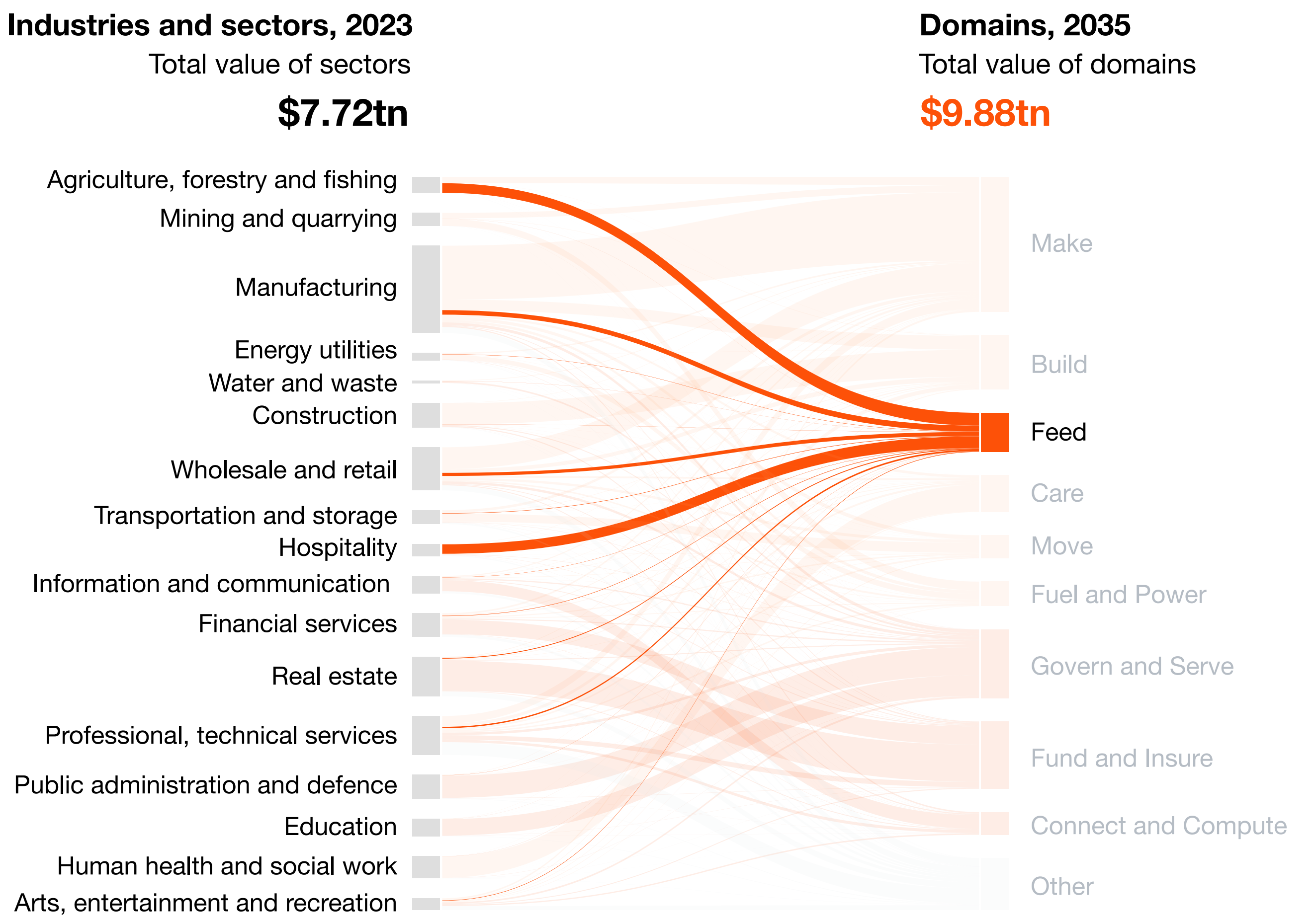
June 10, 2025

Introduction

Food companies are navigating a tough set of obstacles: rising supply chain pressures and shrinking margins on one side; growing consumer demand for healthy, convenient and tech-enabled food choices on the other. Tariffs on agricultural imports can exacerbate commercial tensions and dampen consumer demand in price-sensitive categories. Rising temperatures and changes in precipitation patterns pose significant risks to both crop yields and quality. Actors throughout the global food system must scale technology, mechanisation and farm-level innovation to reduce waste, make processing more efficient, and adapt to consumers' healthier, more eco-conscious diets.

As market dynamics filter down to the checkout aisle, consumers aren't just reacting to change—they're driving it. Their behaviour, preferences and spending power will shape where value is created and where it's lost in the decade ahead. Recent PwC research tracks a reinvented global food system—what we call the '**How we feed' domain**—marked by greater cooperation, innovation and convergence across sectors. By 2035, this vast business ecosystem could achieve a baseline gross value added (GVA) of US$9.88 trillion, potentially reaching US$10.35 trillion in our best-case scenario.

Changing food choices are central to nearly US$10 trillion of value in motion



Source: PwC research and analysis

To explore the interactive graphic, click here.

To gain a deeper understanding of these dynamics, our latest Voice of the Consumer survey engaged more than 20,000 global consumers on their food preferences. What we see is the emergence of an aspirational consumer who is focused on value-driven choices. Worldwide, consumers tell us they are inclined to purchase food that aligns with their attitudes towards health, convenience and sustainability. However, escalating food prices and cost-of-living challenges are constraining their ability to fulfil these aspirations—a sentiment echoed across the 28 global markets surveyed. In North America, for example, nearly half of respondents (43%) find food prices prohibitively high, and concerns over food safety and product quality curb consumer confidence.

As consumers sharpen their focus on the origin and functionality of their food, our analysis finds that food businesses have an important role to play in serving informed and aspirational choices—and that role is shifting. What's more, the disruption of traditional value chains is creating new opportunities for both incumbents and new entrants, and for players, such as healthcare providers and technology companies, who may not have seen themselves as part of the traditional food business. We see areas of convergence between health and wellness, convenience and technology, on the one hand, and food on the other. These dynamics are illustrated in some of our key findings:

- Concerns over ultra-processed foods and pesticide use are intensifying among approximately 60% of consumers surveyed.
- Among the 5% of respondents using GLP-1 weight-loss pharmaceuticals, a majority report reducing food spending and eating smaller portion sizes.
- Over the past year, nearly 40% of respondents have explored non-traditional food retail spaces such as on-demand grocery and subscription services.
- 70% of consumers now use healthcare apps or wearable technologies; a niche group of 'health-tech enthusiasts' (9% of our sample) report making significant lifestyle changes resulting from their use.
- Growing comfort with generative AI (GenAI) in grocery and meal planning among roughly half of consumers signals a promising opportunity for companies to integrate food, health and technology into a cohesive ecosystem.

About the survey

In January and February 2025, PwC surveyed 21,075 consumers across 28 countries and territories: Australia; Brazil; Canada; China; Egypt; France; Germany; Hong Kong, SAR; Hungary; India; Indonesia; Ireland; Malaysia; Mexico; the Netherlands; the Philippines; Poland; Qatar; Romania; Saudi Arabia; Singapore; South Africa; Spain; Thailand; the United Arab Emirates; Ukraine; the United States; and Vietnam. The respondents were at least 18 years old and were asked about a range of topics relating to consumer food consumption and trends, including grocery shopping and food choices, the future of health, emerging technology, and climate and sustainability issues.

Interviews with industry executives took place in May 2025.

PwC Research, PwC's global centre of excellence for market research and insight, conducted this survey.

Consumers are asserting their values-led appetites

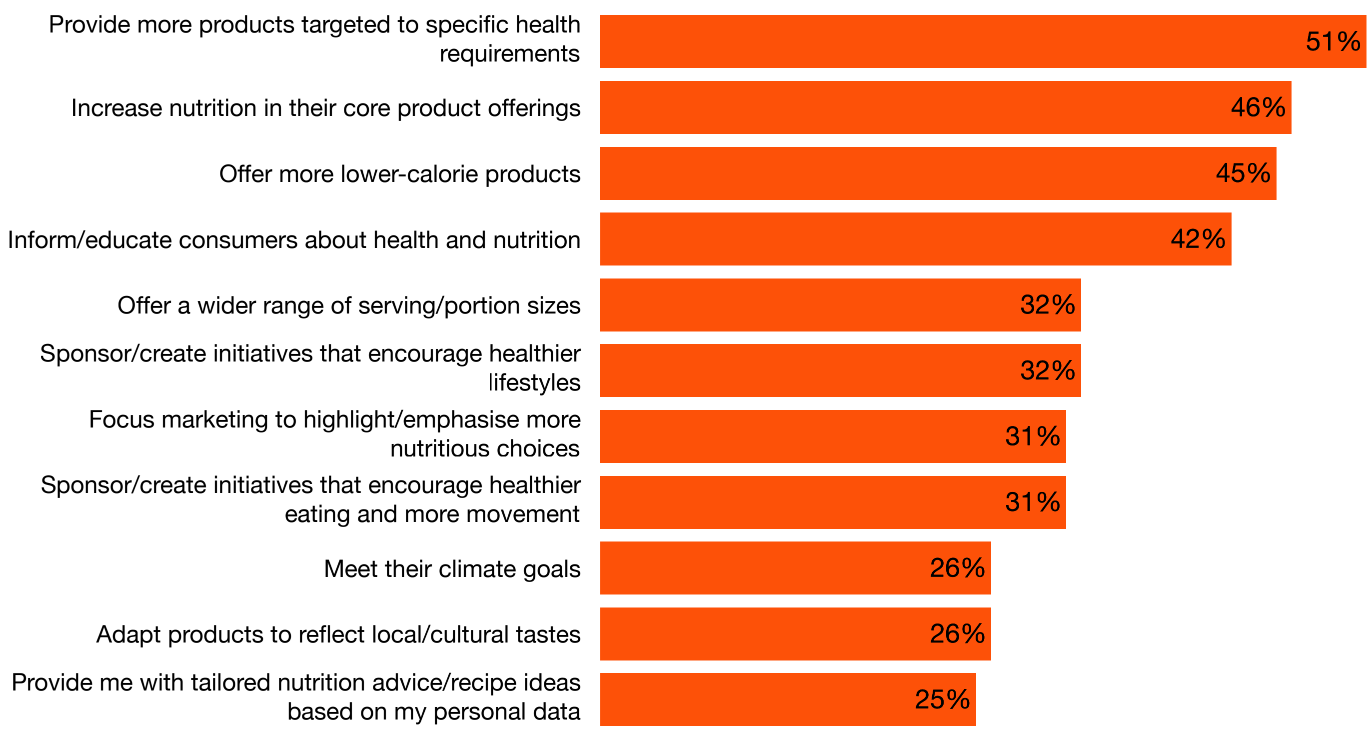
Although consumers believe they are ultimately responsible for making healthy choices, they also have an expectation that food companies and organisations will help them lead healthier lives. When we asked consumers who holds the primary responsibility to encourage healthy and nutritious eating, more than half of respondents (51%) said food producers and manufacturers were in the top three, followed by government and public health organisations (47%), retailers and grocery (37%), and restaurants and food service providers (22%). What's more, a third of respondents (33%) told us that health benefits are among the most important factors in their decision to switch food brands, highlighting a values gap in what is currently offered to consumers by retailers and food manufacturers.

Providing more products targeted to specific health requirements topped the list of the ways companies could enhance consumer health and wellness. Further analysis designed to identify patterns in these findings revealed four key focus areas for food and beverage companies:

- health and wellness advocacy, such as sponsoring initiatives that encourage healthier lifestyles and making health and nutrition the focus of marketing
- nutritional innovation, including offering lower-calorie and health-targeted products
- personalised eating experiences, such as a wider range of portion sizes, recipe ideas and products adapted to local cultures and taste
- a clear commitment to meeting corporate climate goals.

Consumers want more health-related products and information

Q: In your opinion, how could big food/beverage companies contribute to improving the health and wellness of consumers?



Source: PwC's Voice of the Consumer Survey 2025

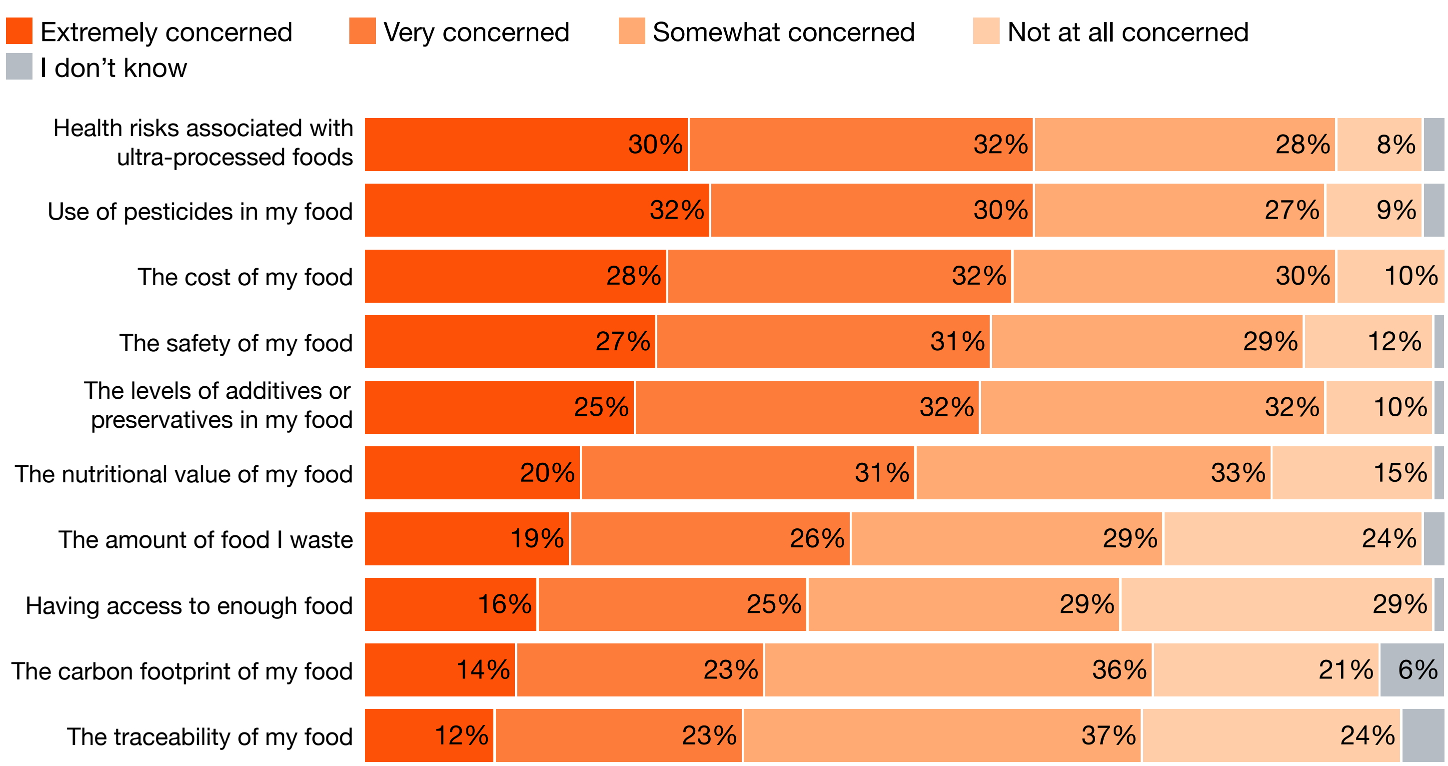
Navigating the complex terrain of health guidance remains a challenge for many consumers, who report contradictory behaviours. They have a clear desire to reduce alcohol intake and avoid ultra-processed foods, and over 50% of respondents plan to increase fresh produce consumption in the coming months. The small group of respondents who rate their health as excellent are likely to expect to increase their consumption of vitamins—but also of snacks including chips, nuts and snack bars.

Food safety

One signal finding related to health and food safety should be a warning to incumbents: 62% of respondents cite ultra-processed foods or pesticide use as a more important concern than price, nutrition and sustainability. These attitudes are most pronounced among younger generations, particularly millennials, signalling a shift towards greater food safety expectations. The respondents most concerned with these issues are also more likely to supplement their diets with vitamins and rate their health higher than other groups. This suggests consumers are increasingly linking their food choices with overall health, creating more overlap between the food system and the health and well-being sector.

Ultra-processed foods and pesticides are top food safety concerns

Q: How concerned, if at all, are you about the following?



Source: PwC's Voice of the Consumer Survey 2025

Climate commitments

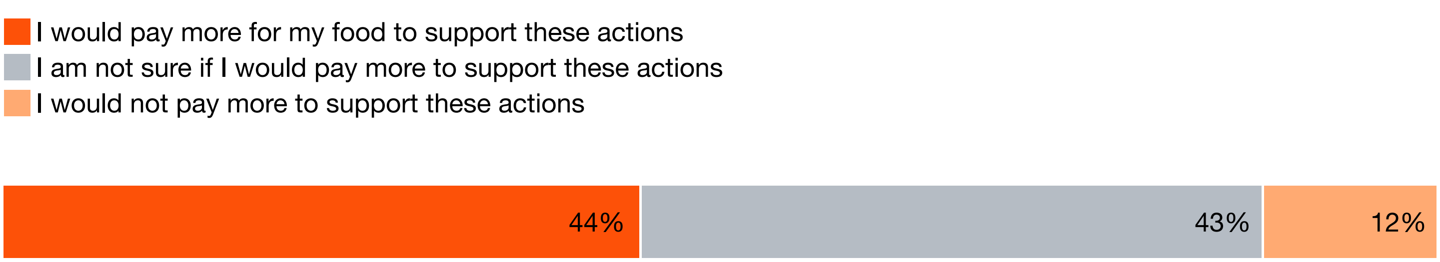
We've found a recurring theme in our consumer surveys over the years: although eco-consciousness remains a significant aspiration among consumers, it doesn't always translate into purchasing behaviours. More than 80% of respondents express concern about climate change, with nearly a quarter (24%) worrying daily about its effects. But only about half that amount (44%) say they are willing to pay more for food that supports the environment, such as by improving soil quality and enhancing biodiversity; an additional 43% say they could be persuaded to follow suit.

> 'We have to do more as a global community to ensure we produce food with the lowest environmental impact. We must also look to sustainable and regenerative farming practices for future generations' sake.'

—Enda Buckley, Director of Sustainability, Carbery Group

Consumers say they would pay more to support the land and environment

Q: Actions taken to improve the health of the land and the environment can result in higher costs for food producers. Which of the following statements best represents your opinion on your willingness to support these actions?



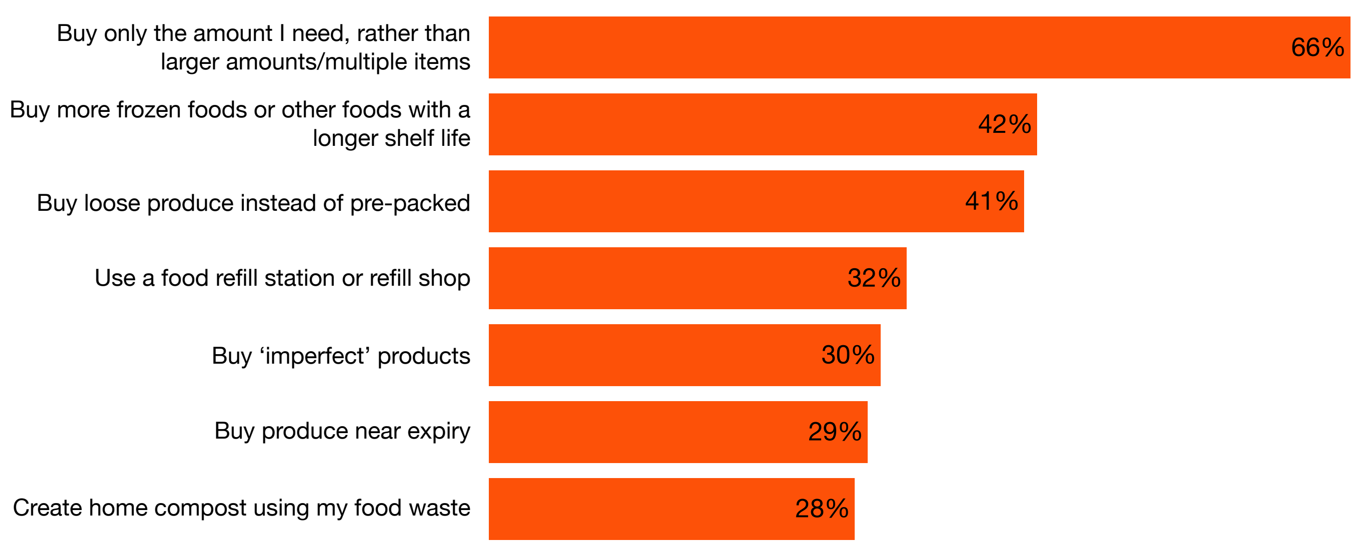
Source: PwC's Voice of the Consumer Survey 2025

We classified only a small subgroup (14%) as 'eco-conscious shoppers,' those who prioritise social and environmental considerations when making food choices. The emphasis among consumers more broadly is often on more immediate and tangible aspects, such as buying pesticide-free and locally produced foods, which top the list of the sustainability practices taken into consideration in food purchases. Two-thirds of consumers are committed to buying only what they need in order to reduce food waste, and 42% are considering a shift towards more frozen and long-lasting food options. Those who rank climate change in their top three concerns, often those with higher disposable income and with children, are more inclined towards proactive behaviours, such as home composting and growing their own food.

Most consumers aim to cut food waste by buying only what they need

Q: If you had to take three actions to help reduce the overall impact of food waste on the environment, which, if any, of the following would you be most likely to do?

Ranked 1–3



Source: PwC's Voice of the Consumer Survey 2025

Consumers are open to innovation for a healthier, more convenient diet

Today's consumers are open to adopting new technologies and exploring non-traditional shopping channels that align with their values and steady appetite for convenience. Nearly 40% of consumers have ventured into non-traditional food retail spaces over the past year. Although in-store visits to supermarkets continue to dominate, making up a significant portion of the daily or weekly food shop (62%), subscription services, meal-kit deliveries, online grocery shopping and farmers' markets are all now integral parts of the food shopping ecosystem.

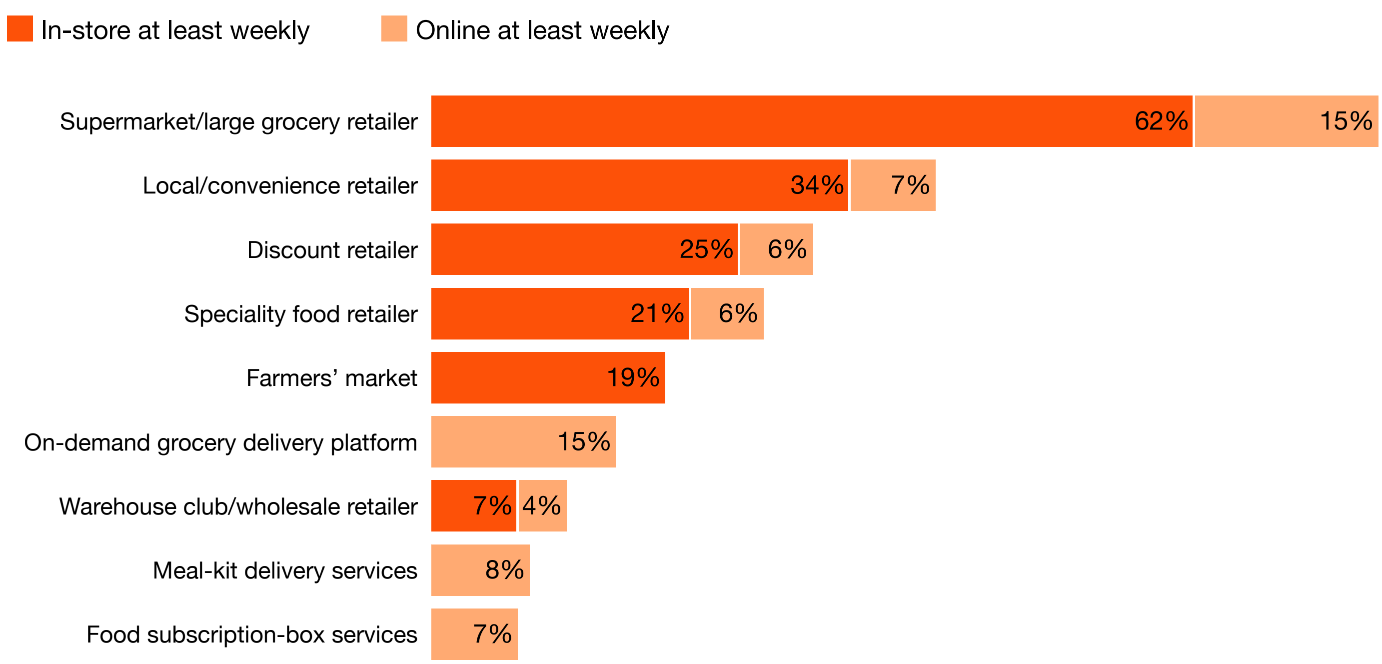
> 'The only way to meet the consumer demand for food being healthy, convenient and affordable is for the ecosystem players to rethink how they collaborate, innovate and share risk.'

—Elizabeth Horvath, VP Marketing, North America, Kerry

The average consumer now accesses approximately 3.6 food shopping channels. The number increases to 4.0 channels for consumers who prioritise health or climate change; younger generations of shoppers are building more robust relationships with delivery platforms that allow them to order groceries, meals or other products directly to their homes.

Traditional supermarkets still dominate, but alternative retailers have achieved market share

Q: How often do you shop for grocery items from these sources?



Source: PwC's Voice of the Consumer Survey 2025

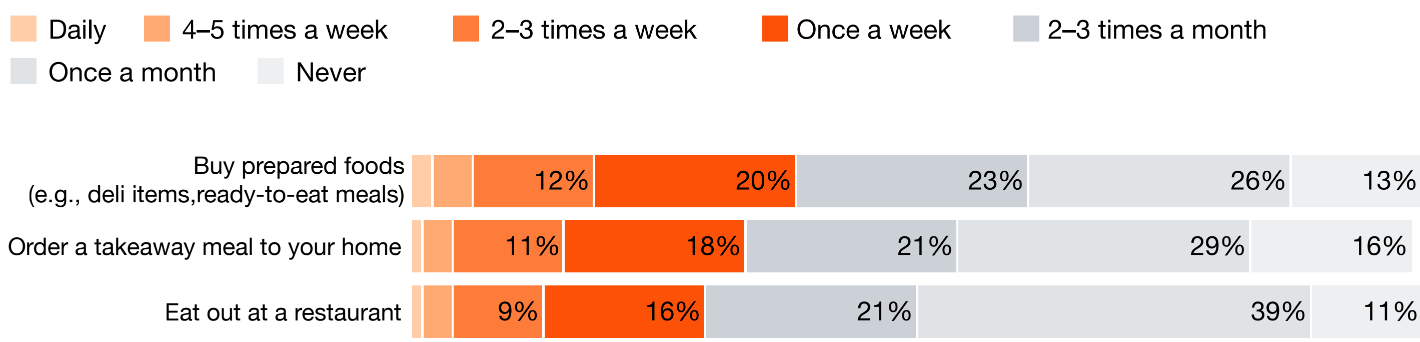
Appetite for convenience

Convenience remains a pivotal consumer demand, and a growing area of value creation. Emerging markets in the Middle East and Southeast Asia are experiencing rapid expansion in on-demand online delivery services; globally, 38% of respondents purchase prepared food at least weekly. Meanwhile, 34% opt for home-delivered takeaway meals, and 29% dine out at least once a week. These behaviours are especially prevalent in urban areas and among the financially secure. Younger generations are boosting the demand for quick, convenient food options.

Food companies are responding by rethinking how, when and where they engage with consumers. In our interviews, executives emphasised the importance of meeting people in the moments that matter. 'Consumers have different needs, evolving during their day, their life,' Martin Renaud, Chief Marketing Officer of Mondelez International, told PwC. 'You have to be able to reach them through the right channels with the right offering.'

Over a third of consumers buy prepared foods at least once per week

Q: On average, how often do you do the following?



Note: Percentages shown may not total 100 due to rounding.
Source: PwC's Voice of the Consumer Survey 2025

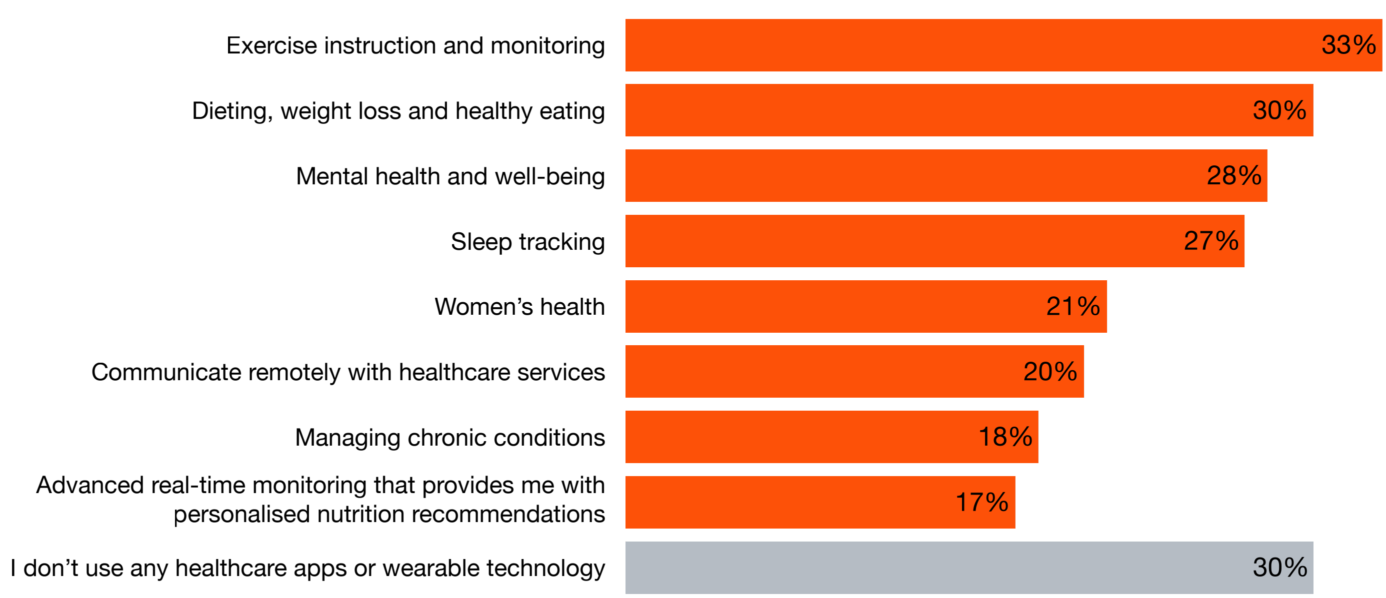
Adoption of food tech

Tech-driven personal wellness is at the centre of a movement in how consumers are evaluating their diet and routines. Fully 70% of consumers now use at least one healthcare app or wearable technology such as a health monitor—with an average of three technologies playing a role in their health and lifestyle management. Among these users, a dedicated group of respondents we have identified as 'health-tech enthusiasts' stand out. These individuals, known for engaging in regular exercise and looking to influencers on social media to help shape their dietary choices, employ four or more healthcare apps or devices, effecting substantial changes in their daily routines.

What's more, 90% of users acknowledge that wearable technology has influenced their daily habits, with significant changes noted by more than a third (34%). Popular devices like smart rings, bracelets and watches, as well as sophisticated health tools such as glucose monitors and smart kitchen devices that automate a range of tasks, are leading this charge, alongside advances in meal planning tools and personalised nutrition platforms.

Apps and wearables are supporting a unified approach to health and nutrition

Q: Do you use healthcare apps or wearable technology for any of the following reasons/activities?

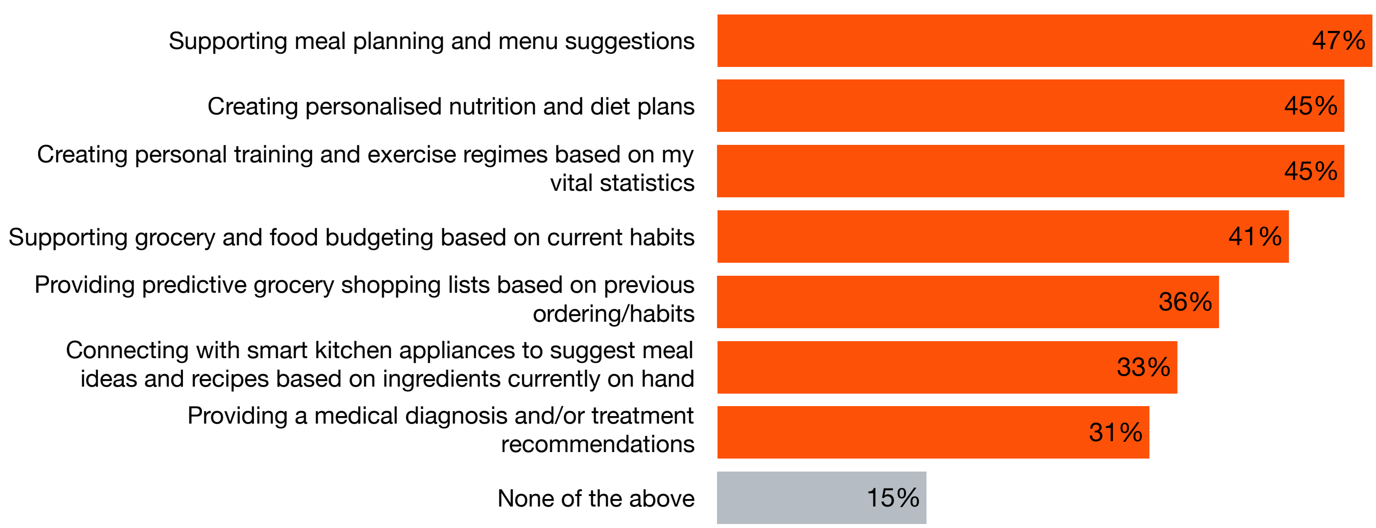


Source: PwC's Voice of the Consumer Survey 2025

When it comes to how comfortable consumers are with using generative AI, grocery and meal planning stand out. Consumers' willingness to use AI in this context reflects a broader demand for highly personalised experiences that cater to individual dietary needs and preferences. It also represents a ripe opportunity to create an ecosystem that unites convenience, shopping, health and technology. Companies that can effectively combine these elements stand to benefit by offering consumers the guidance they need to shop, cook and eat well, supported by AI-driven solutions.

Consumers are open to GenAI to reimagine meal planning

Q: Which of the following activities would you be comfortable allowing GenAI to perform?



Source: PwC's Voice of the Consumer Survey 2025

Consumer aspirations are constrained by food prices

Price remains a primary driver of purchasing decisions. The cost-of-living crunch continues to affect consumer confidence, and more than half of respondents report they are 'financially coping' or facing financial challenges, such as being unable to pay some or all of their monthly household bills. As a result, consumers are looking to stretch their budgets while balancing the priorities they care about. Survey respondents in Europe, North America, Asia, and Africa and the Middle East cited the cost of living as the number one 'threat/risk' to their country within the next 12 months; in Latin America, it was second to 'economic instability.'

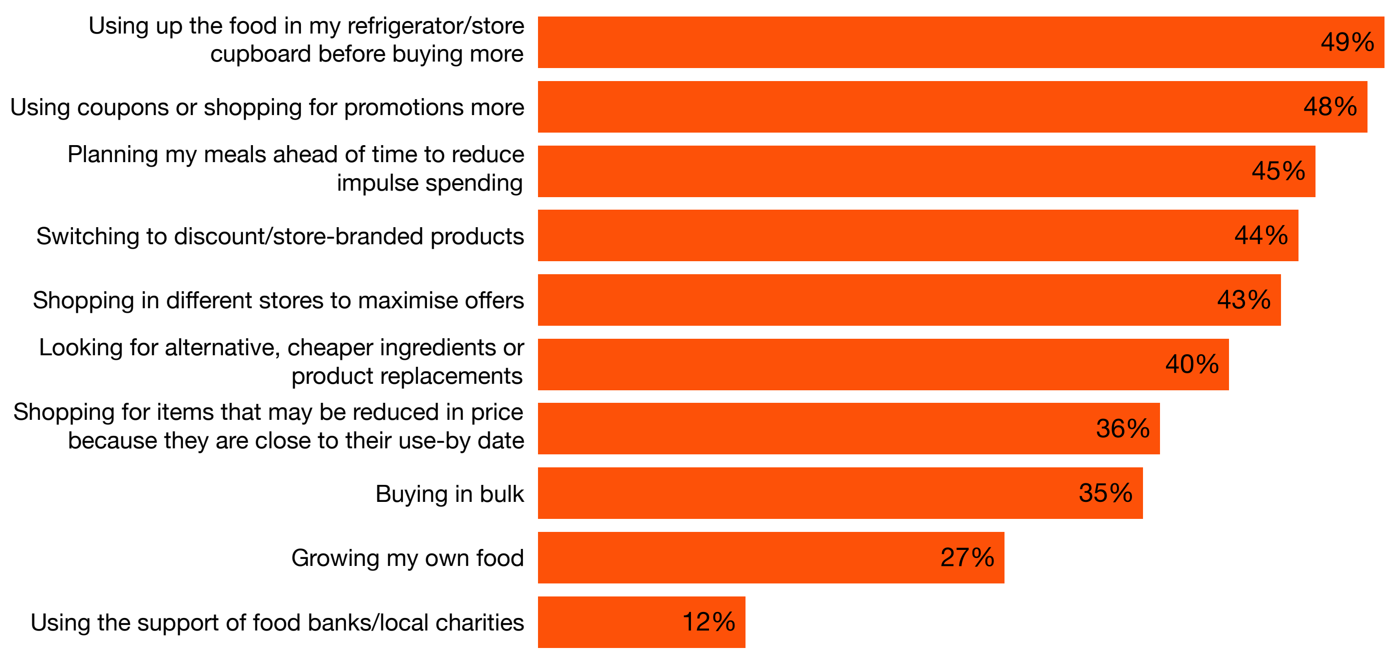
Our analysis suggests that consumers consistently prioritise price over nutritional value, sustainability and local production when they have to make trade-offs.

- **Health awareness versus dietary habits.** Most consumers express a high level of concern about the health risks associated with ultra-processed foods; however, only 35% note they greatly try to avoid them in their food consumption.
- **Environmental intentions versus information-seeking.** Although 44% of consumers say they are willing to pay more to support environmental sustainability in food production, 82% say they do not routinely seek out information on food brands' climate and sustainability initiatives.
- **Local versus international sourcing.** Forty-four percent of consumers say they are willing to pay a premium for locally produced foods, yet 56% would opt for more cost-effective options produced outside their country.

At a tactical level, almost half of respondents who noted concerns about the cost of food say they are making the most of leftovers and the food they already have and actively adopting money-saving strategies, such as seeking promotions. Forty-four percent are considering discount or store-branded products in search of better deals. This shift in consumer behaviour presents an opportunity for companies that excel in cost leadership. Fifty-one percent of respondents cite 'better value for money' as a top reason for them to switch from a food brand they usually buy to a different brand.

Consumers are adapting their habits to tackle increased food cost

Q: What actions, if any, are you taking to reduce or offset the effects of food cost?



Base: All respondents who stated they were somewhat, very or extremely concerned about the 'cost of my food'
Source: PwC's Voice of the Consumer Survey 2025

Serving the aspirational food consumer

Consumers today desire products that are affordable and that provide health and convenience benefits, which creates a challenging landscape. Businesses need to develop competitive models that strike a balance between being cost-effective and meeting consumer aspirations.

> ‘By using insight to put customers at the heart of our operations, brands and retailers can innovate together to open up entirely new markets that better serve evolving customer needs.’
>
> **—Ashwin Prasad, Chief Commercial Officer, Tesco**

Review and refresh the product range

- **Capture the market with value-based product offerings.** Relying on price increases or reducing package sizes to drive growth is unsustainable in the long run. Instead, businesses must enhance their offerings to deliver both affordability and added value. To cite a real-world example, a well-known grocer’s introduction of budget-friendly whole foods lines has cemented its appeal among health-conscious, cost-aware consumers.
- **Enhance nutritional content and functional benefits.** Create healthier, cleaner and more functional formulations (as in added protein or fibre), maintaining product quality and reducing costs, without sacrificing taste. Some manufacturers are investing in science-based R&D to reduce sugar content in certain products while reducing the cost of ingredients.
- **Consider premiumisation for niche segments.** Product reformulation could extend to premium ranges aimed at consumers who are at the forefront of diet and nutrition trends, such as GLP-1 users who are buying and eating less food, consumers looking for nutrient fortification, or people who have specific dietary needs.

Make a 'domain' play

- **Partner with innovative providers.** The food industry is dynamic, and it increasingly intersects with such areas as healthcare, financial services, and shopping apps and platforms. Collaborations in service areas such as personalised recipe and meal planning can boost consumer loyalty, and cross-sector collaborations can drive growth. Our recent analysis shows that the top-performing consumer packaged goods companies are 1.2 times as likely as others to engage with adjacent industries, such as waste management, healthcare and logistics.
- **Increase innovation in your delivery formats.** New models, such as subscription and on-demand services, enhance engagement by catering to consumers' desire for personalised and hyper-charged convenience. Businesses that connect more deeply with a network of service providers, logistics partners and technology solutions are more likely to satisfy demand for seamless interactions.
- **Unlock the potential for margin improvements.** Working closely with ecosystem partners and suppliers, businesses can find innovative ways to boost margins and cut costs, and either increase profit margins or pass on savings to cost-conscious consumers. Analysis we conducted for a UK retailer showed that boosting supply chain transparency led to margin uplift through reduced food waste and optimised inventory costs.

Transform the consumer experience

- **Predict and personalise experiences.** As consumer preferences and purchasing patterns evolve, strong consumer listening and data analytics involves going beyond tracking behaviour to anticipate customers' preferences, purchase patterns and demand for tailored health, convenience and affordability.
- **Help consumers find what they're looking for.** Empower consumers with clear, accessible information about the values they prioritise, such as health, sustainability, local sourcing or specific dietary needs. Consider integrating your product line with AI tools and wearables to simplify product selection and comparison based on consumer values.

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The authors thank Claire-Louise Steele, Rachel Surgenor, Julia Zimmer, Rachel Wang, Elizabeth Brush, Jakob von Baeyer and Michael Brewster for their contributions to this article.