



Addressing
Consumer Priorities
to Achieve Healthy,
Sustainable, and
Just Food Systems

March 2026

Contents

| | | |
|---|--|----|
| | Executive Summary | 3 |
| 1 | The Global Desire for Better Food | 5 |
| 2 | Consumer Attitudes, Behaviors, and Barriers to Healthy and Sustainable Diets | 7 |
| | a. Current Attitudes and Behaviors | 8 |
| | b. Price and Access: The Biggest Hurdles to Healthy and Sustainable Diets | 10 |
| | c. The Knowledge Gap: Consumer Understanding and Adoption | 13 |
| | d. Motivations for Dietary Change | 15 |
| | e. Influencers for Positive Change | 18 |
| 3 | Recommendations for Industry and Government Actors | 20 |
| 4 | Conclusion | 22 |
| 5 | Contact Us | 23 |



Executive Summary

This is the fifth edition of the *Grains of Truth* report series, our global consumer initiative in partnership with GlobeScan.

In 2021, EAT and GlobeScan conducted significant research in advance of the United Nations Food Systems Summit. Since then, the two organizations have collaborated on developing questions to the public about their definitions of good, healthy, and sustainable food, their concerns about the current food system, and who should drive the changes needed to improve it.

This report provides a review of consumer perceptions and attitudes toward our global food system based on a large-scale, multi-country survey with close to 32,000 respondents. The insights gathered reveal consumer understanding, current behaviors, core motivations, and significant barriers faced in consuming healthy and sustainable diets.

The goal of this analysis is to equip actors in the food system, such as governments, policymakers, producers, and retailers with the knowledge needed to respond to consumer desires and challenges, and to support the transformation of our global food system to one that is healthy, fair, and sustainable.

Where the 2025 EAT-Lancet Commission report outlines the scientific imperative and priority solutions for food systems transformation, this Grains of Truth report details public perception, validating where the solutions must be focused.



The survey reveals key insights on consumer attitudes, including:

Current behaviors

A majority of global respondents report regularly consuming meals that align with health and planetary goals, with certain actions considered easy such as avoiding throwing food away (76%), cooking a healthy meal (75%), or cooking a plant-rich or vegetarian meal (62%).

Main barriers

Despite the high interest in adopting healthy and sustainable diets (86%), the single biggest barrier to purchasing healthy and sustainable food is affordability, and the second major barrier is perceived lack of availability. Beyond price and access, a lack of knowledge of sustainable food systems and the Planetary Health Diet creates significant barriers for consumers trying to make better food choices.

Speaking to individual health

Globally, the most important benefits of the Planetary Health Diet are that it reduces the risk of diseases (37%) and that it supports health and environment (36%), revealing the consumer focus on tangible, personal health outcomes when considering food choices.

Influencers

Academics, scientists, and chefs are seen as the most positive influencers for helping people adopt healthy, eco-friendly diets, while governments, celebrities, and the financial sector are viewed less favorably.

The Global Desire for Better Food



The Global Desire for Better Food

The 2025 EAT-GlobeScan *Grains of Truth* report provides insights into the shifting landscape of global food systems from the perspective of consumers.

Globally, there is a growing appetite for food that is both good for us and good for the planet. However, a look at the world's daily eating habits reveals a major disconnect between our desires and our diets.

To better understand this disconnect, a global survey was conducted in 2025 with nearly 32,000 respondents across 33 markets, providing a clear picture of the obstacles people face.

The main challenges for consumers include rising food prices exacerbated by economic pressures, limited access to healthy and sustainable options, and low public awareness about sustainable food systems and choices.

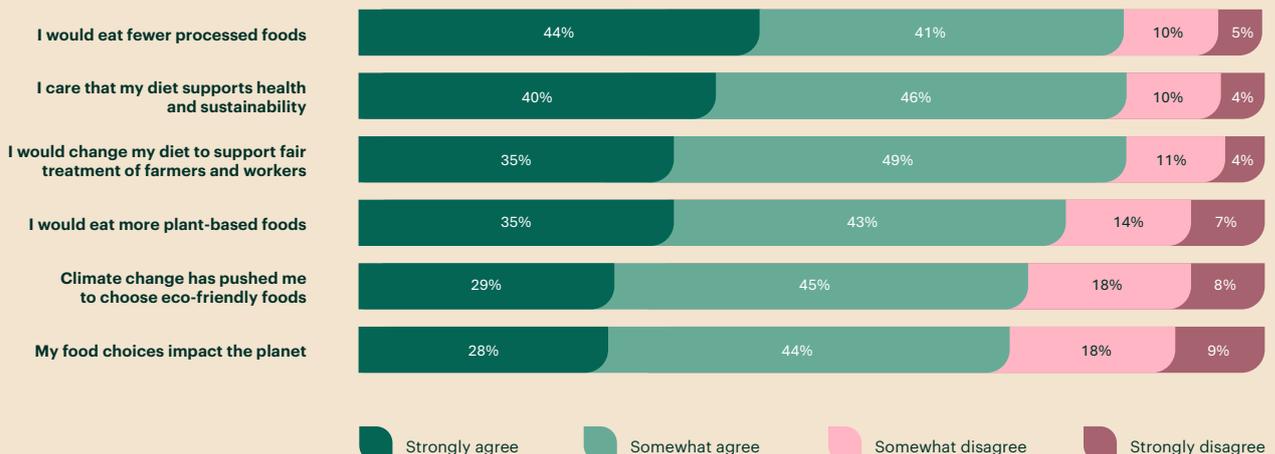
Research Methodology

- Representative online samples of approximately 1,000 adults in each of 33 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in USA) (n=31,960).
- Samples are representative of online population, weighted to reflect general population census data.
- Online surveying in July and August 2025.

Attitudes toward Diet

Average of 33 Markets, 2025

Four in ten have a strong desire to eat fewer processed foods and to have a diet that supports personal health and sustainability; fewer are strongly convinced that their food choices impact the planet.



How much do you agree or disagree with the following statements?

Consumer Attitudes, Behaviors, and Barriers to Healthy and Sustainable Diets



Current Attitudes and Behaviors

Understanding consumer attitudes toward meals that are considered to be healthy and good for the planet provides a reference measurement of current behaviors. The insights illustrate how these principles have been integrated into routines independent of familiarity with the Planetary Health Diet as outlined by the *EAT-Lancet* Commission.

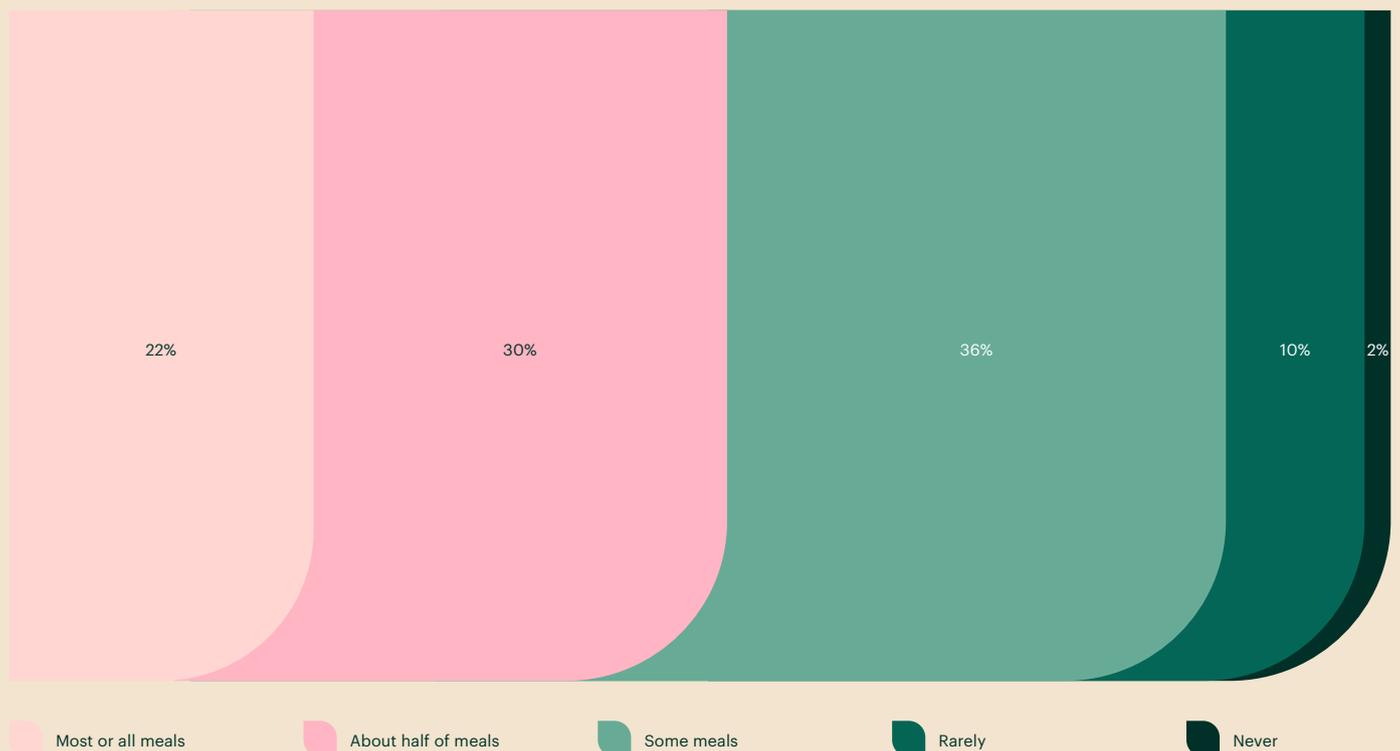
Globally, a majority (56%) feel they eat healthy food most or all of the time. Similarly, a majority (51%) report eating meals that are healthy for them and the planet for most or about half of meals. However, the frequency of this behavior varies significantly across generations, indicating different levels of commitment and integration into daily life.

A smaller but significant 12 percent of consumers report doing so rarely or never. This group likely represents those facing the most significant barriers or holding the lowest levels of motivation to consume meals that are healthy for themselves and the planet.

Frequency of Eating Meals That Are Healthy and Good for the Planet

Average of 33 Markets, 2025

Over half of respondents say that at least half of the meals they consume are healthy for themselves and good for the planet.

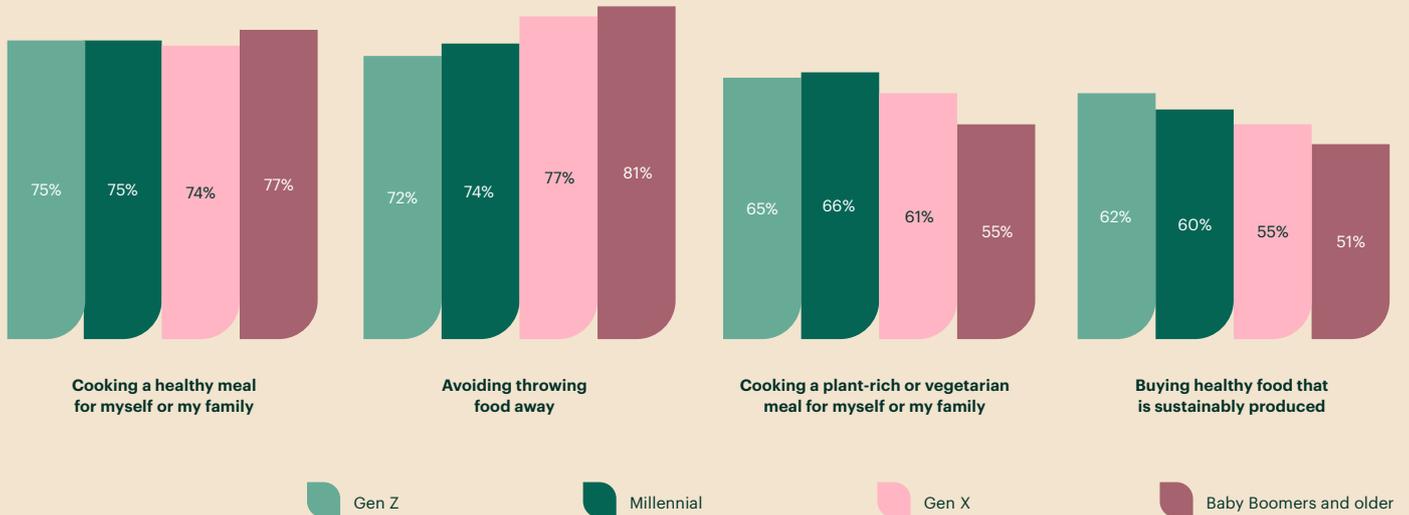


? In the past month, how often have you eaten a meal you would describe as healthy for you and good for the planet? Choose one.

Food and Eating Habits at Home

"Very" and "Somewhat Easy," by Generation,
Average of 33 Markets, 2025

Cooking a healthy meal and avoiding throwing food away are seen as the easiest actions by people of all generations, especially Baby Boomers and older.



? Please indicate how easy or difficult you feel each of the following actions are.

Generational and geographical differences

- Baby Boomers and older are more likely to eat meals they describe as healthy, while Gen Z and Millennials are more likely to eat more vegan and/or vegetarian food (no large shifts compared to 2024).
- Young people (Gen Z) are less likely than older generations to think that avoiding food waste and eating less meat is highly impactful in protecting the environment; however, Millennials are most likely to recognize the impact of eating less dairy.
- Gen Z describes at least half of their meals as being healthy for them and the planet at a higher rate compared to older generations.
- Respondents in India, Kenya, and Nigeria have the highest self-reported frequency of consuming meals that are considered healthy for individuals and the planet.

Price and Access: The Biggest Hurdles to Healthy and Sustainable Diets

While motivation to adopt healthy and sustainable diets is high (87%), significant barriers prevent widespread behavioral change. Understanding these friction points is critical to transforming our eating behavior and the food system.

Sustainable habits such as cooking at home and avoiding waste are perceived as relatively easy, whereas the act of purchasing healthy food that is sustainably produced presents a greater challenge.

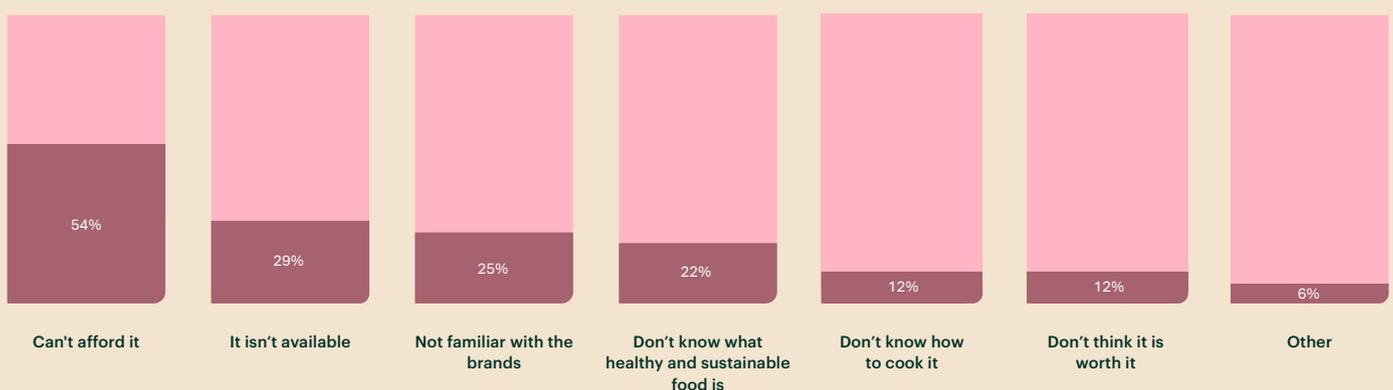
When consumers who find it difficult to buy healthy and sustainable foods are asked why, their answers are clear and consistent, pointing to fundamental market failures that governments and businesses are positioned to solve:

- **They cannot afford it (54%):** Cost is the single greatest barrier, cited by just over half of respondents. This suggests that innovation in affordability through supply chain efficiency, new product formats, different business models, or taxation programs is a critical aspect to be considered by food system actors.
- **It is not available to them (29%):** A large portion of consumers simply cannot find these options where they shop. This highlights a clear gap in distribution and retail strategy, and making products accessible in mainstream channels is essential.
- **They are not familiar with the brands (25%):** One-quarter of consumers struggle with a lack of brand recognition and trust. This points to the need for increased public education and improved front-of-package labeling to guide consumers toward credible and healthy choices in a confusing marketplace.

Difficulties in Buying Healthy and Sustainable Food

Subsample: Those Saying “Very” and “Somewhat Difficult” to Buy Healthy Food That Is Sustainably Produced, Average of 33 Markets, 2025

Over half of respondents highlight affordability as the biggest barrier to purchasing healthy and sustainable food.



? Why do you find it difficult to buy healthy and sustainable foods?
Choose all that apply.

Affordability as a barrier has increased since 2023. A strong majority (81%) recognizes that climate change is a factor that is actively influencing food prices. Making healthy and sustainable food affordable is very important (91% agree or somewhat agree), providing a key lever for consumer change on a global scale.

Whether cost or availability is the primary obstacle to buying healthy and sustainable foods often depends on the region. In most developed economies, cost is the top barrier while in many emerging markets, availability is the main obstacle.

While availability remains a major issue in certain parts of the world, the overall trend suggests that this is becoming less of a barrier in most markets.

The 2025 EAT-Lancet Commission positions justice as both a goal and a driving force for food systems transformation. Achieving a just food system requires ensuring the Planetary Health Diet is affordable and accessible. The Commission finds that more than half of the world's population is already struggling to access healthy diets, and nearly half of the global population falls below the minimum standards for affording healthy diets, safe living environments, and decent working conditions for food systems workers.

The consumer data confirm that affordability is the single biggest barrier to purchasing healthy and sustainable food. Consumers echo the Commission's justice goal, expressing a strong desire to make healthy and sustainable food affordable to all.

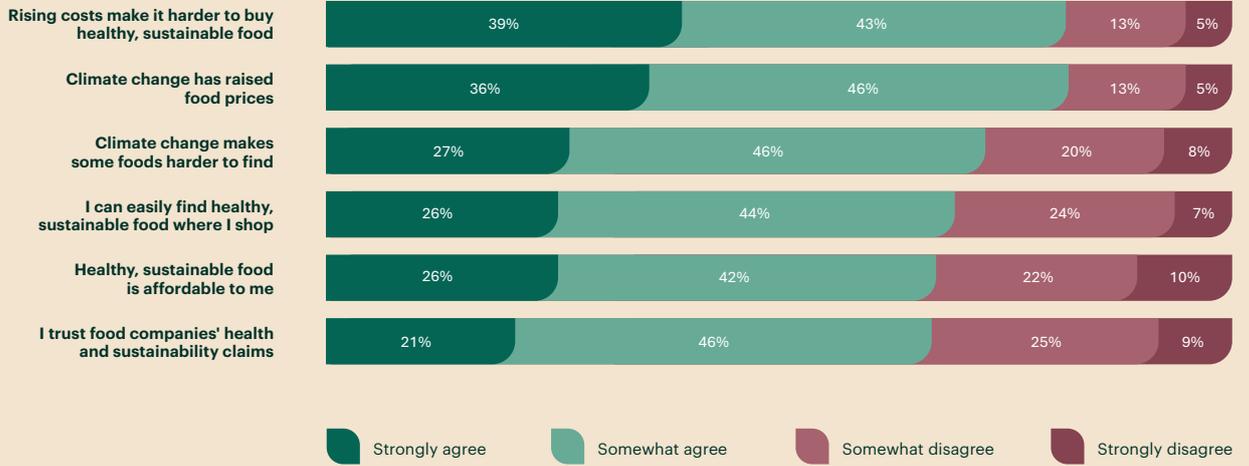
Affordability, availability, and perceived difficulty of buying healthy and sustainable foods must be addressed to unlock the full potential for transforming consumer behaviors for healthier people and the planet.



Constraints and Enablers

Average of 33 Markets, 2025

Large majorities believe that rising costs are making it increasingly difficult to buy healthy and sustainable food, with most believing this is partly due to climate change.



? How much do you agree or disagree with the following statements?

Generational and geographical differences

- Purchasing healthy, sustainably produced food is believed to be easiest by people living in Africa and Asia-Pacific, with Egypt, India, China, Indonesia, and Kenya having the highest rates of finding it very or somewhat easy to buy healthy food that is sustainably produced.
- Difficulty buying healthy and sustainable foods due to lack of familiarity is most common in Colombia, Vietnam, Egypt, India, and Saudi Arabia, although this is becoming less of a barrier.
- Lack of affordability is the largest barrier in all markets except Colombia, Mexico, Peru, China, Indonesia, Thailand, and Vietnam where lack of availability is the top barrier (except in Colombia where familiarity is the biggest barrier).

The Knowledge Gap: Consumer Understanding and Adoption

Beyond price and access, a lack of knowledge creates significant barriers for consumers trying to make better food choices.

This lack of knowledge creates hurdles at every step of the process, from identifying products on the shelf to using them at home. The survey highlights several key information gaps:

- 27 percent do not believe that their food choices impact the planet.
- 25 percent are not familiar with sustainable brands.
- 22 percent do not know what healthy and sustainable food actually is.
- 12 percent do not know how to cook it.

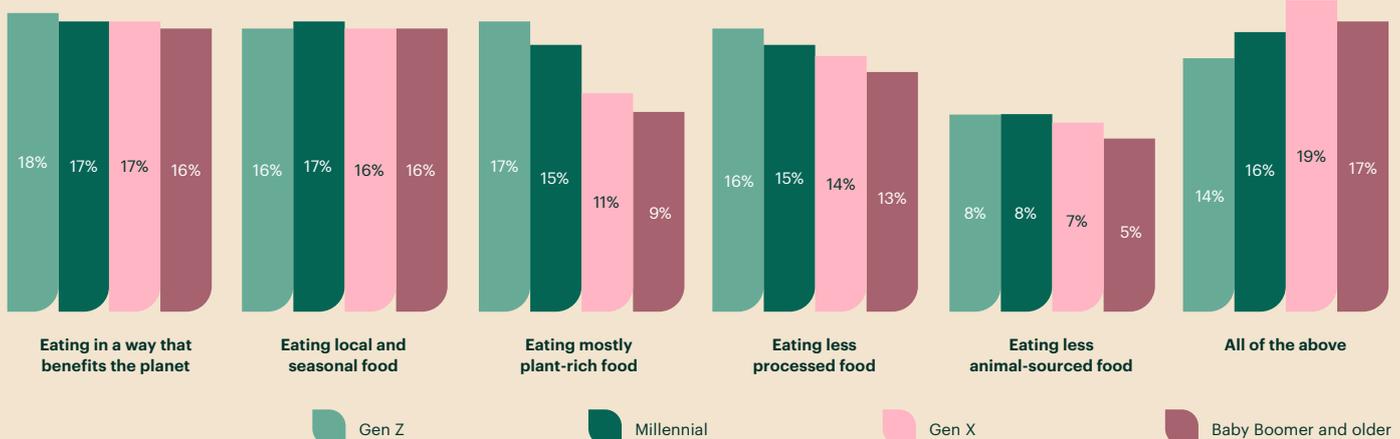
Activities such as recycling, avoiding food waste, and avoiding plastic packaging are perceived as having the highest impact on protecting the natural environment, with eating less meat and less dairy having some of the lowest perceived impact. This points to a clear gap in public knowledge regarding how food systems impact the natural environment and which aspects of dietary habits have the most significant impacts.

Taken together, the barriers of cost, access, and lack of knowledge around food systems create challenges, even for the most well-intentioned consumer.

This lack of knowledge is also reflected in how people define a Planetary Health Diet. Consumers gravitate toward tangible and familiar concepts such as eating in a way that benefits the planet (17%). This suggests that the core message of environmental benefits of a healthy diet speaks to consumers, but it needs to be more clearly defined.

Understanding of a Planetary Health Diet

Average of 33 Markets, by Generation, 2025



Younger generations are more likely to link eating mostly a plant-rich diet to a Planetary Health Diet.

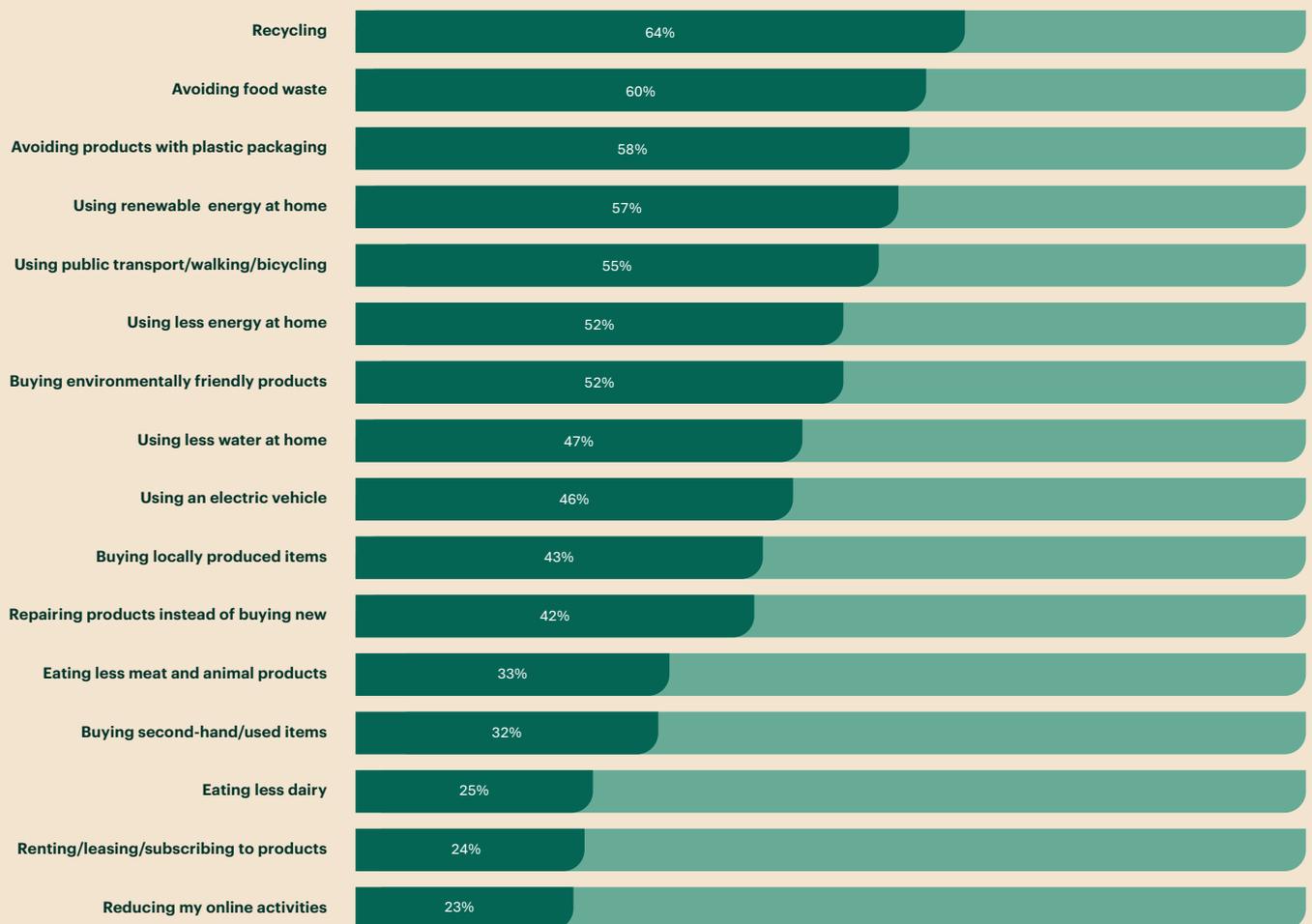
The 2025 EAT-Lancet Commission calls for transformation, which requires urgent changes in individual and collective behaviors. The Planetary Health Diet emphasizes a balanced and predominantly plant-based dietary pattern, with moderate inclusion of animal-sourced foods. This shift could help prevent approximately 15 million deaths per year globally and diminish the risk of non-communicable diseases. Despite a majority reporting that they eat healthy and sustainable meals, this survey reveals a gap regarding the core tenets of the shift required. Consumers rate the impact of eating less meat and dairy among the lowest when it comes to protecting the environment and instead prioritize actions like recycling and avoiding food waste. This suggests that while consumers are motivated by the goal of eating healthier, they are often unaware of what a healthy diet is composed of.

The lack of a clear, unified definition of a healthy and sustainable diet presents both a challenge and a significant opportunity for education and initiatives by food systems actors such as governments, retailers, or chefs and influencers to address this gap.

Perceived Impact of Activities on Protecting the Natural Environment

"Large Impact," Average of 33 Markets, 2025

Tangible, waste-related actions, including avoiding food waste, are thought to be most impactful; actions like eating less meat/dairy are seen as less impactful.



Please rate how much of an impact you think each of the following activities have in protecting the natural environment (air, climate, nature, water, wildlife).

Motivations for Dietary Change

A clear pattern emerges when comparing motivations for adopting a Planetary Health Diet: personal health benefits hold more weight for the individual consumer than purely environmental reasons.

While benefits like reducing the risk of diseases and making people feel stronger score highly, more selfless, planet-focused benefits such as helping to slow down climate change score lower.

When presented with a range of benefits, consumers globally prioritize those that deliver personal benefits, particularly concerning health. The top three most important benefits reflect personal needs:

- **Reduces the risk of diseases (37%):** The leading motivator is overwhelmingly centered on personal health and disease prevention and is linked to widespread perceptions of the seriousness of cancer around the world.
- **Supports health and the environment (36%):** Its high ranking confirms that while personal health is paramount, consumers are highly receptive to the idea that they do not have to choose between what is good for them and what is good for the planet.
- **Affordable healthy and environmentally friendly food (31%):** The inclusion of affordability as a top-three benefit suggests that consumers see cost not just as a barrier, but as a core component of an ideal food system; they are motivated by the idea of a diet that is accessible and equitable.



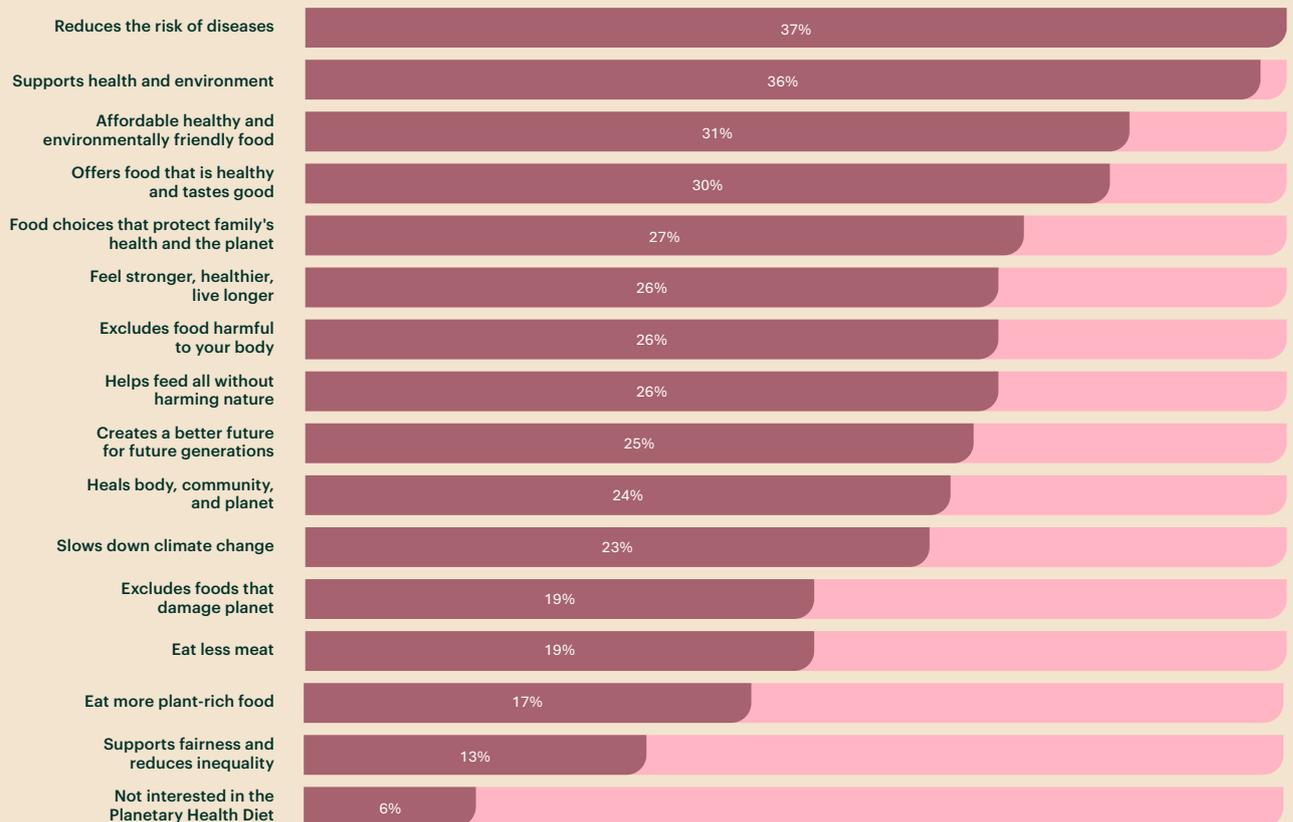
This feedback indicates that while planetary well-being is a valued co-benefit, messages to consumers should lead with personal health benefits to achieve the broadest appeal.

Beyond health and the environment, taste and convenience are also important to consumers. When asked which benefits of the Planetary Health Diet are most important, the offer of food that is both healthy and tastes good appeals to 30 percent of consumers.

Personal Importance of the Benefits of a Planetary Health Diet

Importance of the Benefits of a Planetary Health Diet, Average of 33 Markets, 2025

The top perceived benefits of adopting a Planetary Health Diet are reducing the risk of diseases, supporting personal and environmental health, and producing affordable and healthy environmentally friendly food.

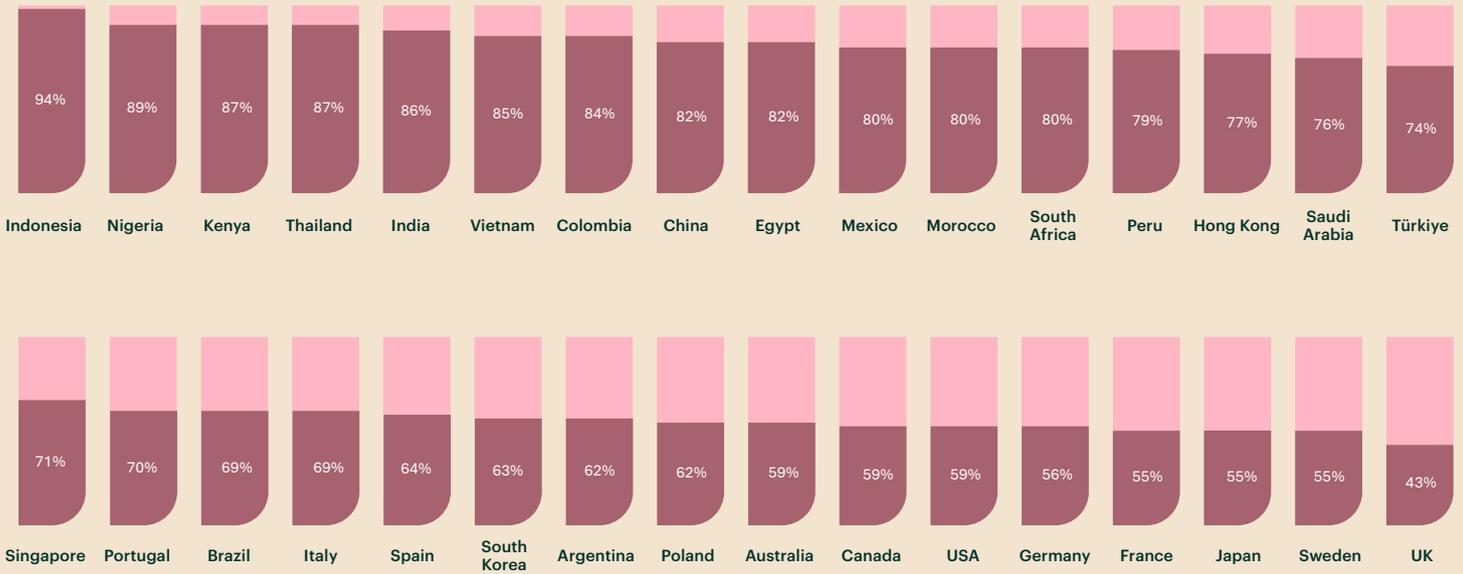


? Which of the following benefits of the Planetary Health Diet are most important to you? Choose up to five.

Likelihood of Adopting the Planetary Health Diet

"Will Adopt" and "Somewhat Likely to Adopt," by Market, 2025

People in Africa, Southeast Asia, and Latin America are most likely to say they will adopt the Planetary Health Diet.



How likely are you to adopt the Planetary Health Diet?

Generational and geographical differences

- Younger generations are more likely to link eating a mostly plant-rich diet to the Planetary Health Diet.
- People in Africa, Southeast Asia, and Latin America are most likely to say they will adopt the Planetary Health Diet.
- The 2025 EAT-Lancet report reveals a profound gap in who is responsible for the food system's environmental toll, with the richest 30 percent of the global population contributing to over 70 percent of the environmental pressures from our food system. However, consumer feedback shows that the populations most eager to adopt sustainable diets are often those with the least historical responsibility for current challenges, highlighting a disparity between those who bear responsibility for causing the problem and who is most open to being part of the solution.

Influencers for Positive Change

When asked which actors help people eat healthy and environmentally friendly diets, academics, scientists, and chefs are viewed most positively, while governments and food companies receive negative ratings, indicating a significant credibility gap.

One-third of consumers (36%) do not believe that information from food and beverage companies helps people eat healthy and environmentally friendly diets.

These ratings suggest that consumers trust expert and practitioner voices far more than those of institutions. This lack of trust is a barrier in itself as it makes consumers skeptical of claims from both public and private companies and also makes them hesitant to adopt industry-led solutions.

While most see national governments as having a negative impact on helping individuals eat healthier, perceptions have improved in many markets surveyed since 2023.

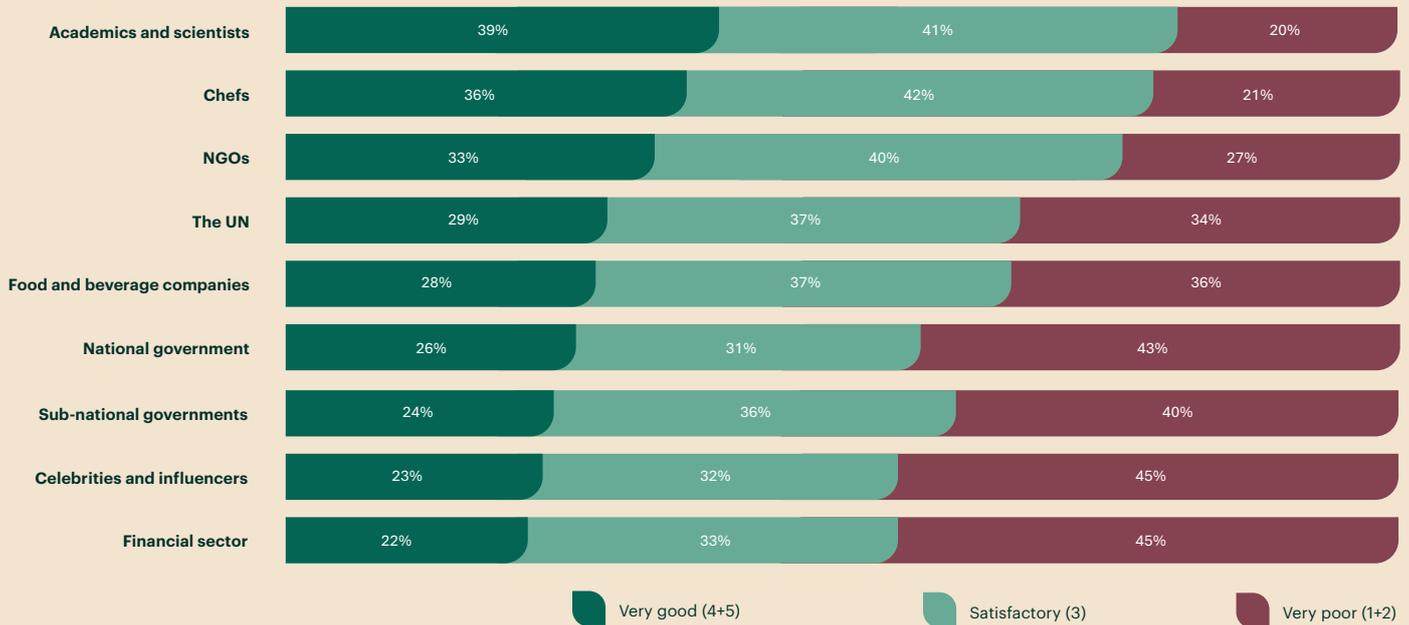
Consumer responses in systemic distrust suggest that addressing the structural barriers of corporate influence and political leadership, as detailed in the 2025 *EAT-Lancet* Commission (page 37), is a prerequisite for overcoming the public's skepticism toward institutional solutions.



Actors Helping People Eat Healthy and Sustainable Food

Average of 33 Markets, 2025

Academics and scientists, followed by chefs, are seen to be the actors most driving efforts to adopt healthy and environmentally friendly diets.



? Please rate the performance of each of the following actors in your country to help people eat healthy and environmentally friendly diets. Please rate each actor's performance from very good to very poor.

Generational and geographical differences

- People in Asia-Pacific see food and beverage companies and national governments as having a more positive impact on people eating healthier, more environmentally friendly diets than people in other regions.

Recommendations for Industry and Government Actors



Recommendations

The analysis of consumer attitudes, motivations, and barriers leads to several clear priorities for food systems transformation.

The following recommendations are designed to help governments and businesses align their strategies with the powerful consumer desire for food that is good for both people and the planet.

Address affordability

Prioritize ingredient sourcing and supply chain efficiencies to address the primary consumer barrier of cost. With 54 percent of consumers citing affordability as a key reason for difficulty, products that deliver health and sustainability at an accessible price point will have the greatest potential for adoption by consumers.

Improve accessibility

Focus on securing distribution in mainstream retail channels. A significant portion of consumers report that sustainable options are not easily available where they shop (29% cite availability as a barrier). Expanding access beyond specialty stores into conventional supermarkets and other retailers is crucial for converting intent into purchases.

Enhance communications

Craft messaging that explicitly links personal health outcomes with planetary benefits such as “helps make healthy and environmentally friendly food affordable for all.” This combination has the broadest and most powerful appeal and outperforms purely environmental messaging.

Leverage trusted voices

Collaborate with credible actors like scientists and chefs to deliver messages. These voices can help bridge the trust gap left by lower consumer confidence in food companies and governments.

Focus on taste and convenience

Develop products that are not only healthy and sustainable but that are also delicious and easy to prepare. Offering food that is both healthy and tastes good is a motivator for 30 percent of consumers, while the perceived ease of cooking healthy meals shows that consumers value convenience. Products that fail on taste or ease of use will not achieve sustained adoption regardless of their other benefits.

Conclusion

This report reveals a global market on the cusp of significant transformation.

There is widespread consumer interest in the principles of the Planetary Health Diet, with over 70 percent of the global population expressing a willingness to adopt it. This interest is primarily driven by a powerful desire for personal health, strongly supported by a growing concern for the environment.

However, this immense potential is currently being held back by major challenges faced on an individual level. The perceived high cost of healthy and sustainable food coupled with a lack of availability and public knowledge creates a significant gap between consumer intent and action. Of these, cost is the most significant and growing challenge which is preventing people from aligning their purchasing habits with their values.

Successfully bridging this gap by delivering affordable, accessible, and appealing products will help drive a more sustainable food future. The challenge is to align products, messaging, and business models with the core consumer desire for food that is good for people, their wallets, their taste buds, and the planet.

Perhaps the most crucial finding is not one of despair, but of hope. The survey results point to a powerful global consensus that the single most important step forward is to make healthy and sustainable food affordable for everyone.



Contact Us

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GlobeScan is a global insights and advisory firm specializing in trust, sustainability, and engagement.

We equip companies, NGOs, and governmental organizations with the insights they need to make sense of their rapidly changing world and respond to shifting societal and stakeholder expectations. We help our clients craft evidence-led strategies that reduce risks and create value for themselves and society. Our purpose is to co-create a sustainable and equitable future.

Established in 1987, we have offices in Cape Town, Dubai, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, Tokyo, and Toronto. GlobeScan is a participant of the UN Global Compact and a Certified B Corporation.

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EAT is a global science-based platform committed to transforming food systems for a healthy, sustainable, and equitable future. Through cutting-edge research, impactful events, and partnerships with diverse stakeholders, EAT drives progress and shapes the global discourse on food system transformation.

A cornerstone of EAT's work is the EAT-Lancet Commission, the first full scientific review defining a healthy diet from a sustainable food system. The 2025 EAT-Lancet Commission provides updated insights and actionable recommendations to accelerate food system transformation.

