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CONSUMER FOOD INSIGHTS

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INTRODUCTION

Consumer Food Insights (CFI) is a monthly survey of more than 1,200 American adults from across the country. Since January 2022, the Center for Food Demand Analysis and Sustainability (CFDAS) at Purdue University has used this survey to track trends and changes in consumer food demand and food sustainability behaviors.[1] Visit purdue.ag/CFDAS or contact cfdas@purdue.edu for more details.

This edition of the CFI survey looks back at consumer trends in 2025 and ahead to consumers' spending intentions for 2026. We explore this month's results by consumers' household income. Thank you for following along for another year of the CFI. We hope you will continue exploring consumer data with us in 2026!

KEY INSIGHTS FROM DECEMBER

- The Sustainable Food Purchasing (SFP) Index continues to exhibit little change, reflecting stability in consumer food purchasing habits and intentions. Households with higher incomes have a higher score in the SFP index.
- Food security (14%) was 2 percentage points lower than November.
- The Consumer Price Index (CPI) for food at home rose by 3.8% over the past 12 months.
- Most consumers (82%) made changes to their grocery shopping in 2025, though only 5% currently expect to implement those changes in 2026, suggesting adaptations were largely reactive to economic pressures that consumers expect to be temporary.
- Nearly one-quarter of households (24%) sought out more sales and discounts or used more coupons in 2025 as a cost-management strategy.

CPI FOOD INFLATION -0.8*
1.9%

FOOD INSECURITY -2
14%

FOOD SPENDING +2
$205/WEEK

GROCERY STOCKOUTS -2
8%

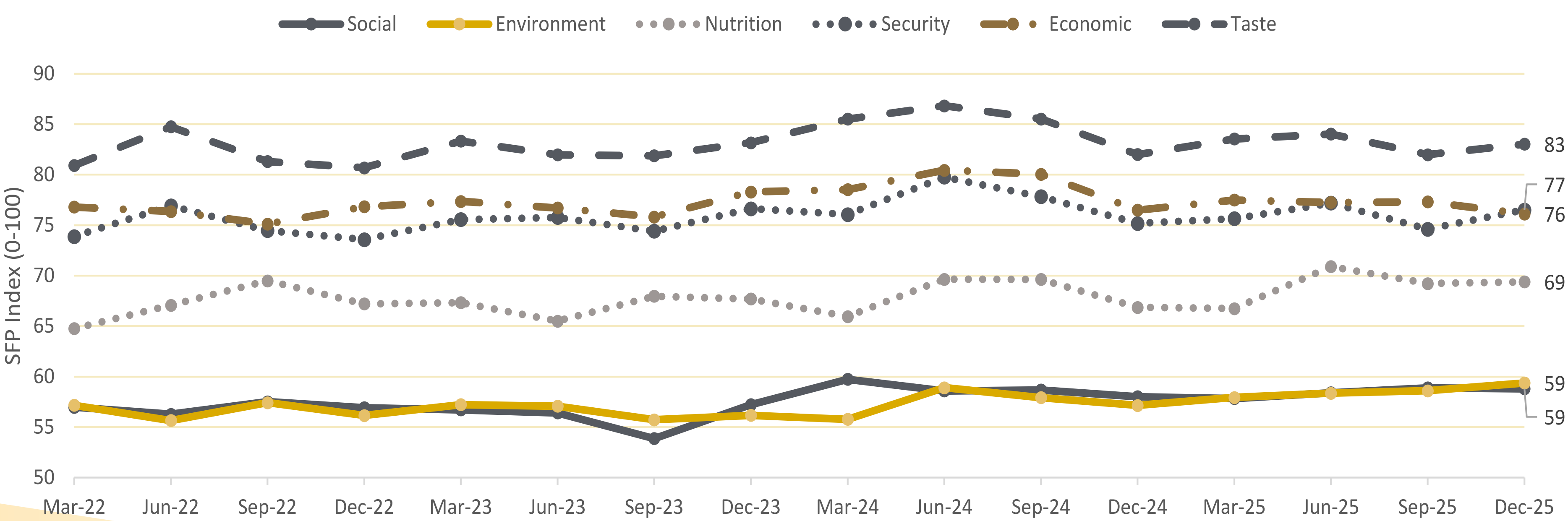
*+/- in upper right corner tracks the unit change in the statistic from the previous month or quarter, depending on data collection frequency

SUSTAINABLE DIETS

Are Americans making sustainable food purchasing decisions?

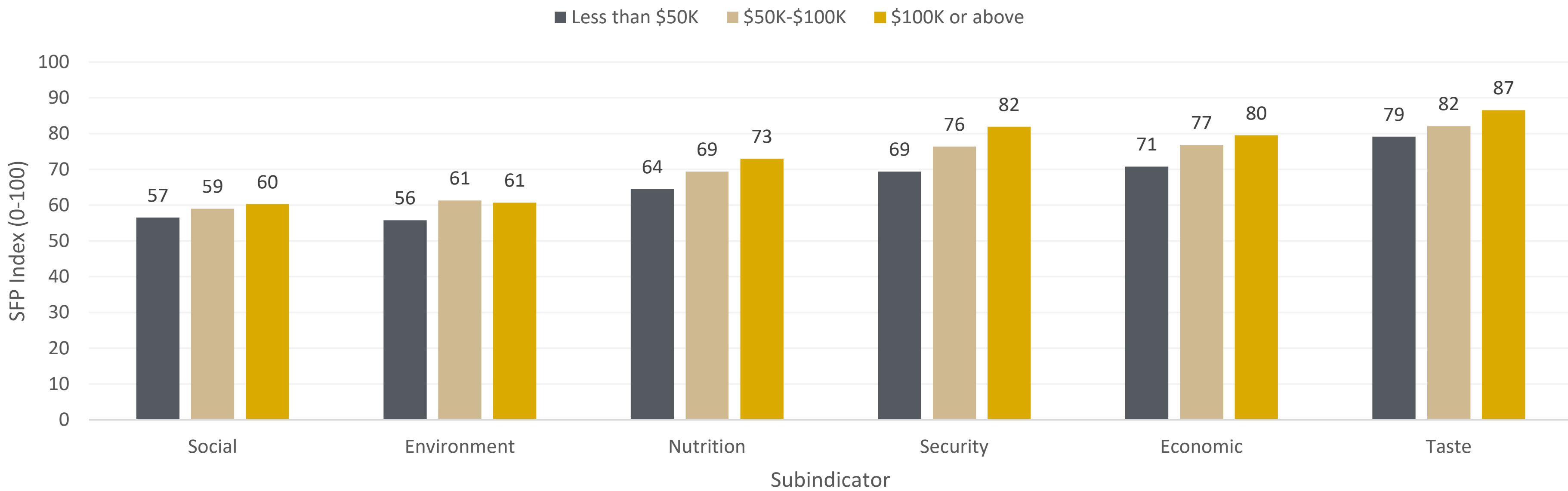
The Sustainable Food Purchasing (SFP) Index[2] remains stable across subindicators, averaging 71 out of 100 (**Figure 1**). The findings reveal that consumers consistently buy food based on taste, receiving the highest rating for this study period. Security and economic come next, indicating that access to safe, affordable food remainds a consistent priority for food purchases. Conversly, purchasing behaviors tied to environmental and social responsibility are less common. When segmenting this month's results by household income, **Figure 2** reveals a similar trend. Regardless of household income, households still purchase foods based primarily on taste, affordability, and safety.

Figure 1. Sustainable Food Purchasing (SFP) Index, Jan. 2022 - Dec. 2025



SUSTAINABLE DIETS

Figure 2. Sustainable Food Purchasing (SFP) Index by household income, Dec. 2025

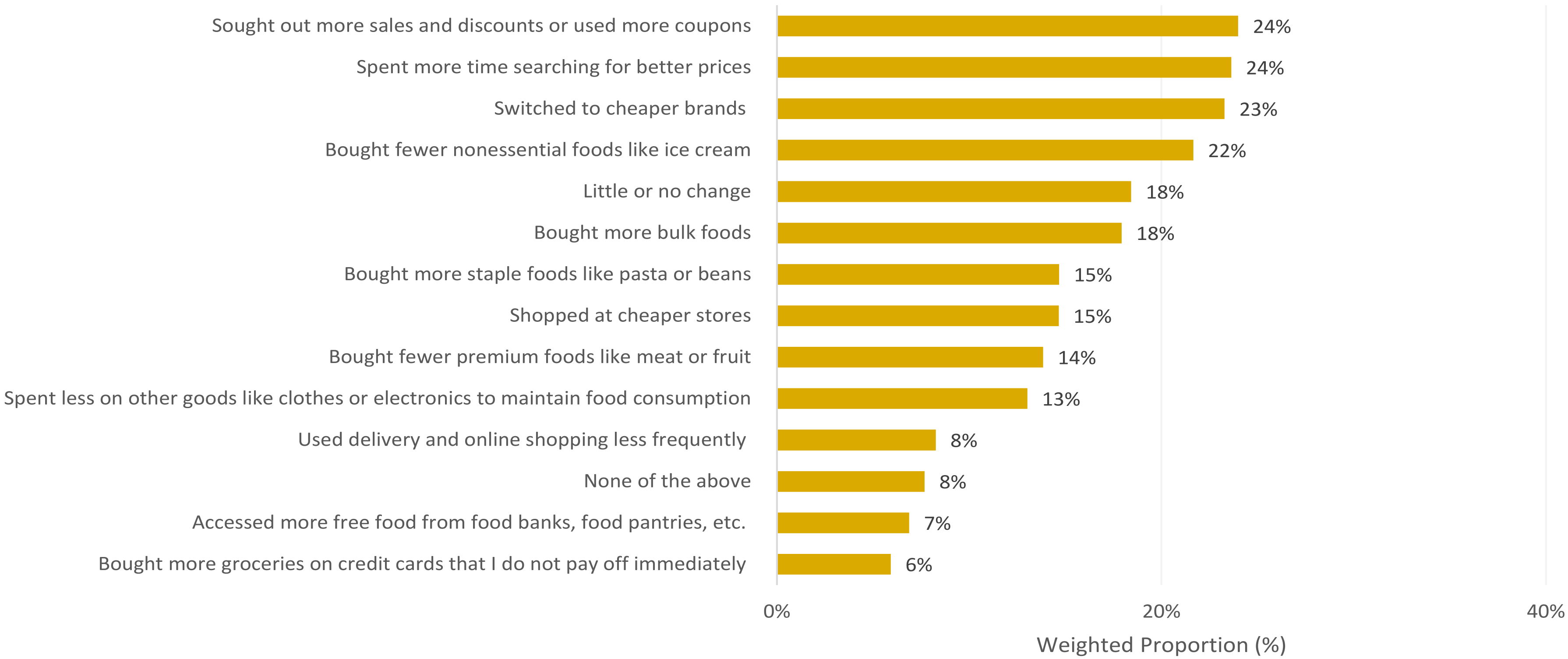


SPENDING BEHAVIOR

Did consumers change their shopping behavior in 2025?

This month's new questions explored consumers' shopping behavior in 2025 and any changes they made to their typical shopping behavior. Largely, households made changes to their spending behavior in light of current economic conditions. Only 18% of respondents made "little to no change" to their shopping behaviors, **Figure 3**, 24% of respondents sought out more sales and discounts and spent more time searching for better prices. 22% of respondents bought fewer nonessential foods, like ice cream.

Figure 3. *"How have you changed your grocery shopping in 2025? (select up to 3 items that most apply)"* Dec. 2025



SPENDING BEHAVIOR

What was the reason for the shopping behavior changes in 2025?

Largely, consumers' changes to their grocery spending in 2025 was due to noted higher overall food prices (56%). Interestingly, 63% of those with a household income over $100,000 cited this reason for change compared to 52% of household incomes below $100,000, **Figure 4**. 17% of low income households (less than $50,000), indicated their reason for changing their grocery shopping habits was due to reduced income or loss of job/employment.

Beyond food prices, higher living costs such as housing, utilities, and healthcare also drove changes in grocery spending, with 29% of middle-income households ($50K-$100K) citing these pressures compared to 24% of lower-income households. When asked whether they expect to continue implementing these spending changes in 2026, **Figure 5** reveals that the majority of consumers remain uncertain, with 56% unsure about sustaining their modified shopping habits. Only 5% of respondents indicated they plan to continue these changes, while 40% do not expect to maintain them, suggesting that many view their 2025 adjustments as temporary responses to economic pressures rather than permanent shifts in consumer behavior.

Figure 4. *"Which of the following changes best describes the reason for the changes you experienced in your grocery shopping in 2025? By income"* Dec. 2025

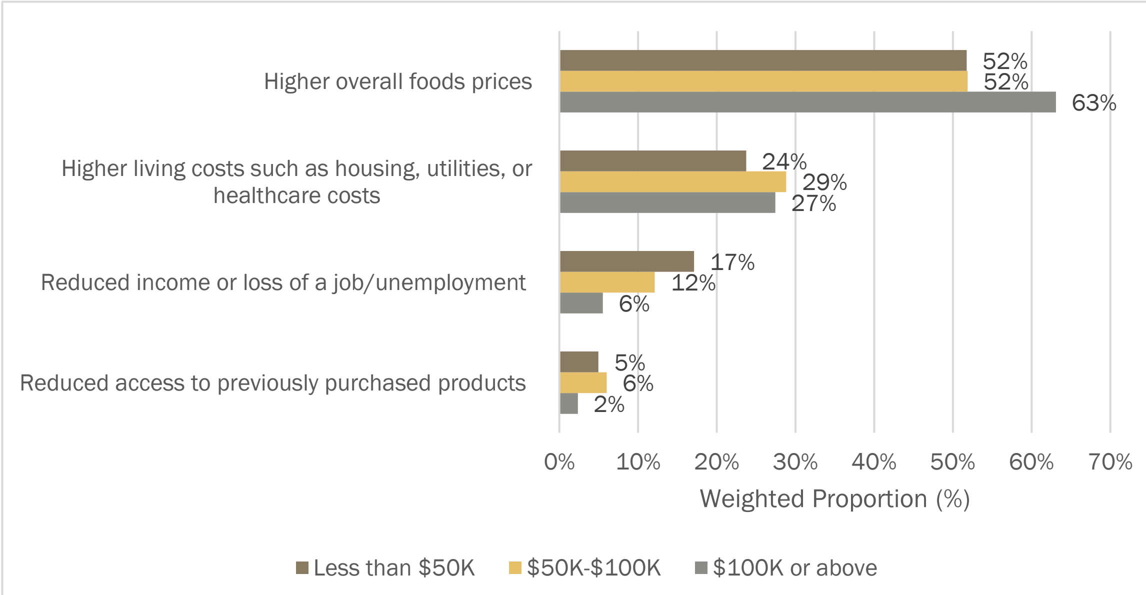
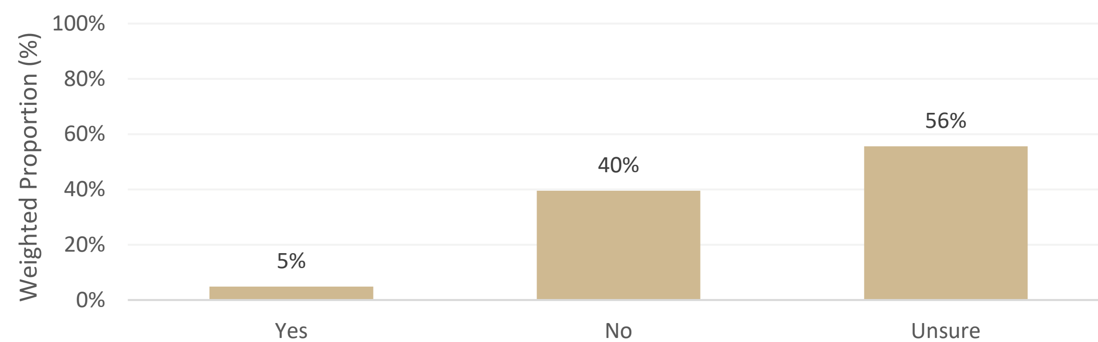


Figure 5. *"Do you expect to continue to implement the changes you made to your grocery spending habits in 2026? "* Dec. 2025



FOOD EXPENDITURES

How much are American households spending on food?

Each month, consumers report their household's weekly spending on food from the last 30 days (**Figure 6**). On average, consumers reported spending about $133/week on groceries (food at home — FAH) and $72/week on restaurants and other carryout (food away from home — FAFH) in December.[3]

Consumer estimates of and expectations for past and future grocery prices both decreased slightly from November to December (**Figure 7**).[4] The official CPI estimate of year-over-year food inflation fell this month (1.9%), down 0.6 percentage points from last month. The consumer estimates and expectations of food inflation remain elevated above the CPI estimate, suggesting a consistent perception gap between consumer sentiment regarding food prices and official estimate. However, as we have seen in the past, consumers appear to be picking up on directional changes of food inflation.

Figure 6. Weekly household food expenditures, Jan. 2022 - Dec. 2025

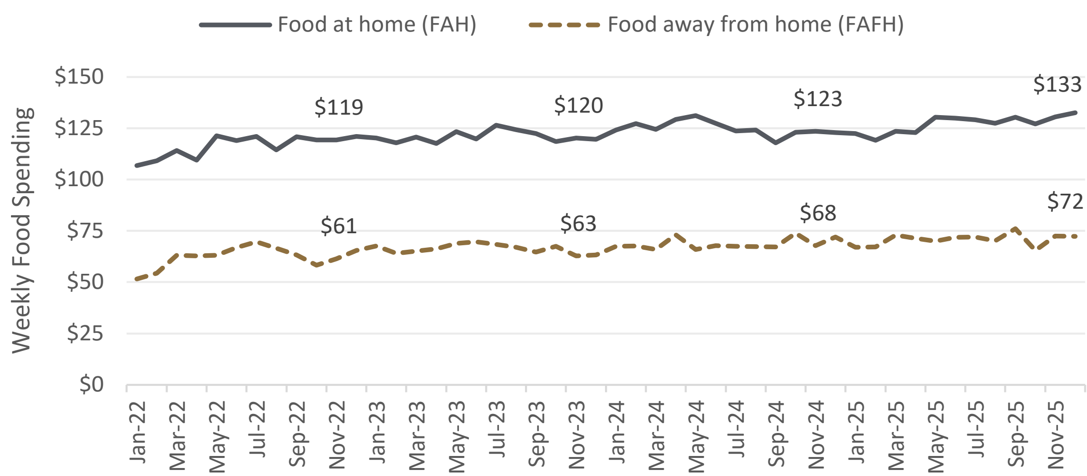
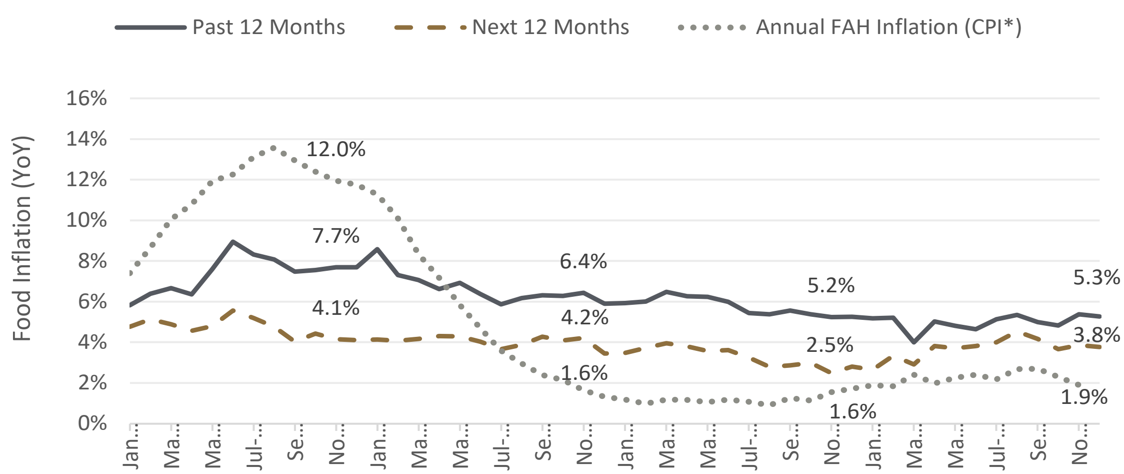


Figure 7. Consumer estimates of grocery price inflation compared to gov. estimate, Jan. 2022 - Dec 2025



*The Consumer Price Index (CPI) is a measure of inflation computed by the U.S. Bureau of Labor Statistics.

FOOD SECURITY

Which Americans are having trouble buying food for their families?

Based on a set of six standard questions about food purchased and eaten in the past 30 days, we estimate national food insecurity to be 14.0% in December (**Figure 8**).[5] This represents a 2-point decrease from last month. The food security rate fell back to the 2025 average, after a significant high rate in November. The food insecurity rate in December 2025 is the same rate we observed in December 2024.

Figure 9 dives further into the data by showing the average annual food insecurity rate by household income group for December 2025. As one would expect, food insecurity among low-income households, less than $50,000 in annual household income, is high at 43%. Those households in the highest income category experience no food insecurity. Ultimately, low-income households are experiencing more material hardships than high-income households.

Figure 8. Rate of household food insecurity in the last 30 days, Jan. 2022 - Dec. 2025

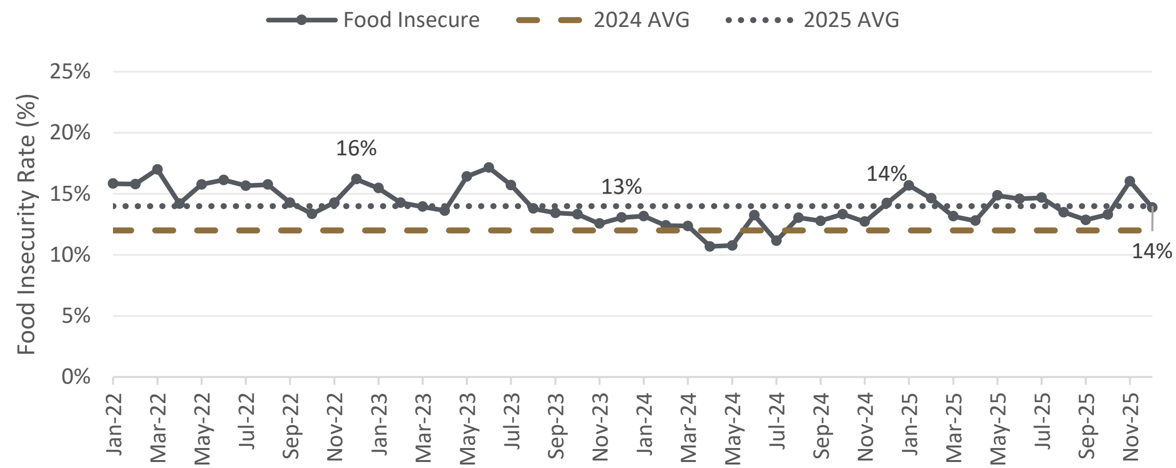
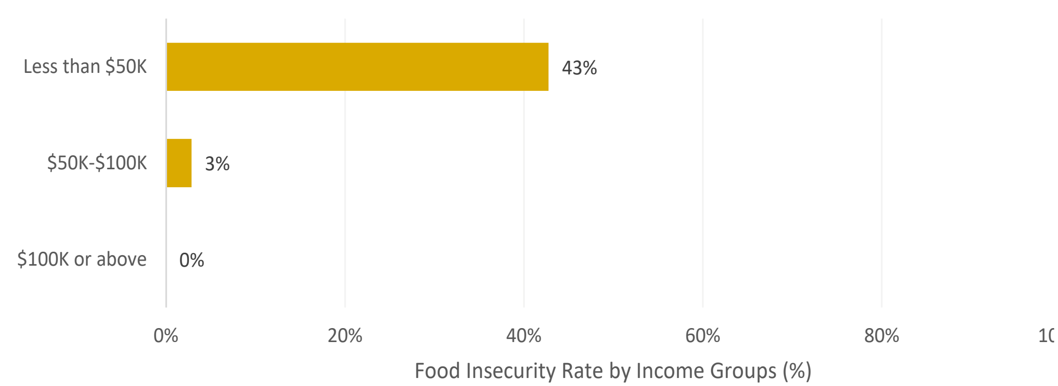


Figure 9. Rate of household food insecurity in the last 30 days by household income, Dec. 2025



DIET QUALITY

What is the quality of the American adult diet?

Utilizing a nine-item questionnaire known as the Mini-EAT Tool[6], we estimate consumers' self-reported diet quality in the last 30 days.

Figure 10 summarizes average Mini-EAT scores since February 2024. Diets are classified as unhealthy (<61), intermediate (61-69) and healthy (69<). American adults score an average of 62.3 on this scale. This average is up just slighly from November (62.0). In December, 18.9%, 35.4% and 45.7% are classified as "healthy", "intermediate", and "unhealthy", respectively.

Average diet quality score across household income reveals that higher income homes ($100,000 or above), have a higher diet-quality score (64.4), than lower income households; however, all income groups still fall below the healthy threshold of 69 (**Figure 11**).

Figure 10. Purdue's American Diet Quality Index (PADQI), Feb. 2024 - Dec. 2025

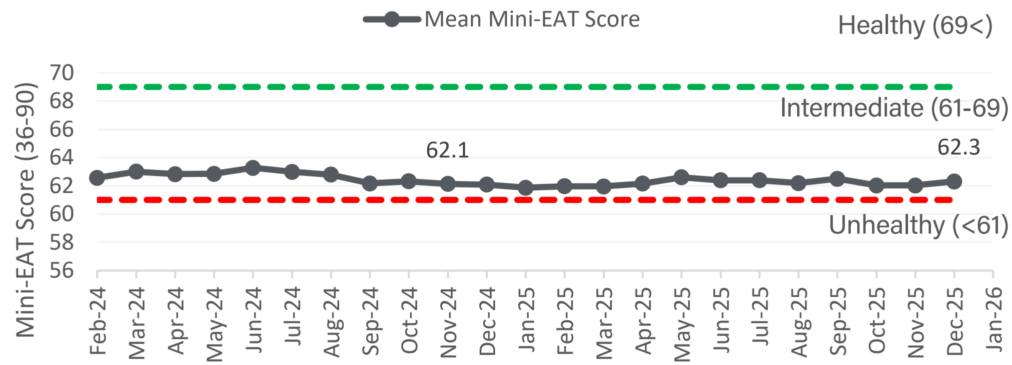
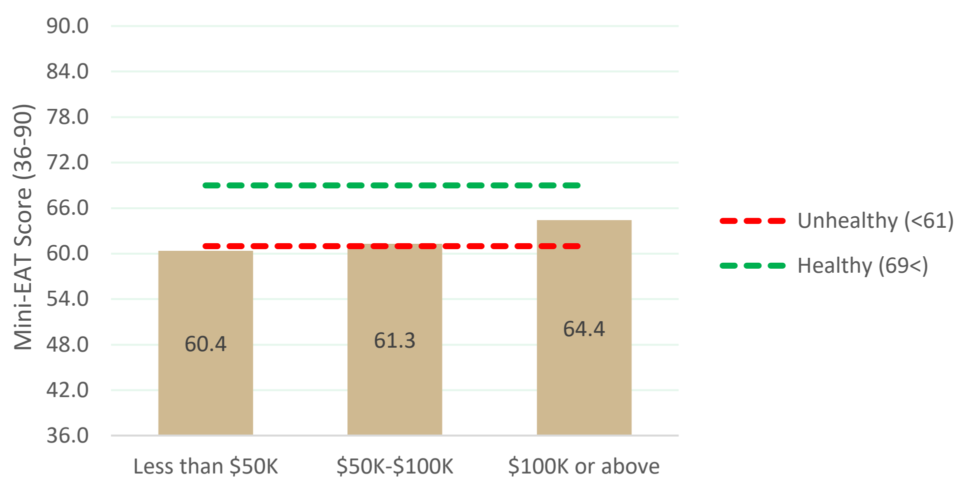


Figure 11. Mini-EAT diet quality classification by household income, Dec. 2025



CONSUMER BEHAVIORS

How are consumers navigating their food environment?

Consumers are asked to report the frequency at which they chose certain foods, checked labels and performed at-home food behaviors (**Figure 12**).

Consumers most frequently choose generic foods over brand-name alternatives, followed by moderate preferences for local and sustainably sourced options like wild-caught fish and grass-fed beef. When shopping, consumers most consistently check use-by dates and nutrition labels, though fewer regularly verify food origins or GMO content. Regarding waste reduction, consumers frequently take steps to reduce food waste and recycle packaging, while unsafe eating practices such as consuming unwashed produce or raw dough remain uncommon. These patterns suggest consumers balance cost-consciousness with sustainability considerations while maintaining general food safety awareness.

Figure 12. Frequency of consumer shopping and eating habits, Dec. 2025

	Mean
Chose generic foods over brand-name foods	3.3
Chose local foods over non-local foods	3.1
Chose wild-caught fish over farm-raised fish	2.9
Chose grass-fed beef over conventional beef	2.8
Chose cage-free eggs over conventional eggs	2.8
Chose organic foods over non-organic foods	2.7
Chose plant-based proteins over animal proteins	2.3
Checked the use-by/sell-by date at the store	4.0
Checked the nutrition label before buying new foods	3.4
Checked for natural or clean labels	3.0
Checked where my food originated	2.9
Checked for food recalls	2.9
Checked for GMO ingredients	2.8
Checked how my food was produced	2.8
Took steps to reduce food waste at home	3.8
Recycled food packaging	3.5
Threw away food past the use-by date	3.2
Composted food scraps	2.4
Ate fruits and vegetables without washing them	2.2
Ate rare or undercooked meat	1.8
Ate raw dough or batter	1.8

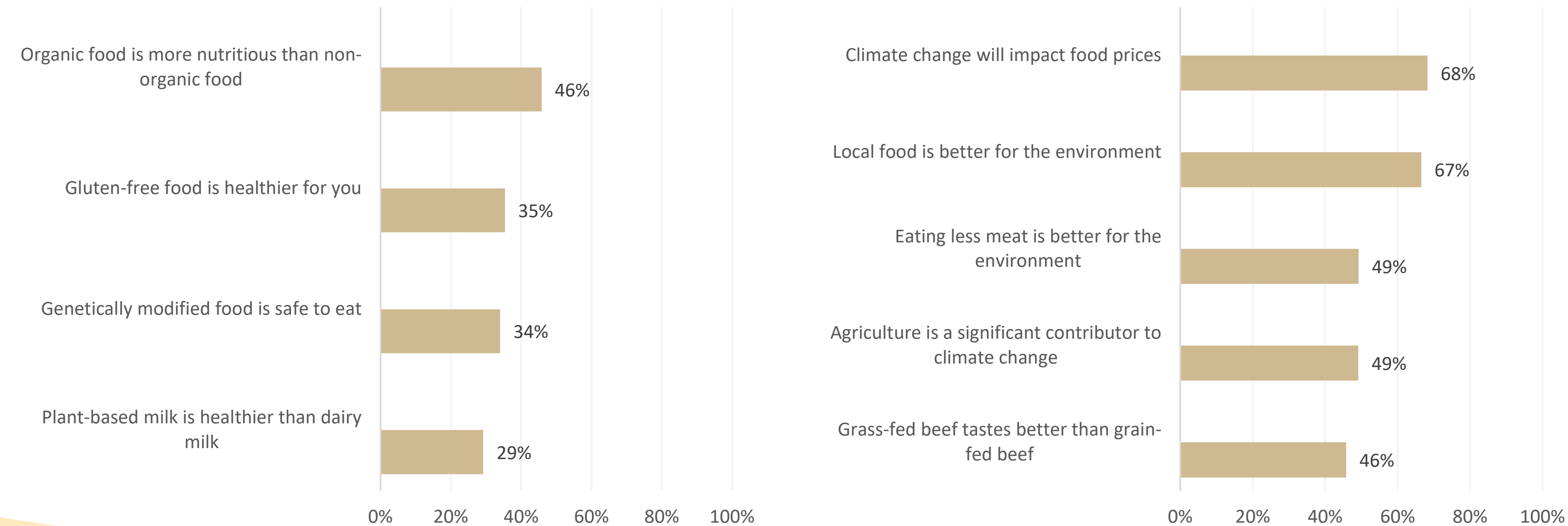
Mean Score	
5	Always
4	Often
3	Sometimes
2	Rarely
1	Never

CONSUMER BELIEFS

What do Americans believe about their food and food system?

Figure 13 summarizes consumer agreement with various statements about the food system. A majority of consumers agree that climate change will impact food prices (68%) and that local food is better for the environment (67%), while roughly half believe that eating less meat benefits the environment (49%) and that agriculture significantly contributes to climate change (49%). Only about one-third of consumers agree that genetically modified food is safe to eat (34%). Overall, these patterns reveal that consumers show greater consensus on environmental and climate-related food issues compared to health and nutrition claims, suggesting that environmental consciousness may be more widespread than nutritional awareness.

Figure 13. Share of consumers who "somewhat agree" or "strongly agree" with claims about food, Dec. 2025



CONSUMER TRUST

Who do Americans trust on topics of food?

Respondents select their most-trusted and least-trusted sources of information about healthy and sustainable food from a list that includes a variety of information sources, such as news networks, government agencies, food companies, personal networks and higher education institutions. Responses are scored and converted to a Trust Index from -100 (least trusted) to 100 (most trusted).[7]

In June 2025, we began allowing respondents to select up to 5 sources rather than forcing 5 most and least trusted sources to account for respondents who may have neutral opinions of many of these organizations. **Figures 14** and **15** reveal distinct patterns in consumer trust across food-related information sources. Trust in government agencies and primary care providers (PCP) remains relatively stable across income levels, with primary care providers commanding the highest trust. In contrast, media outlets and food corporations receive substantially lower trust scores, with higher-income consumers expressing greater skepticism toward these sources. Overall, consumers demonstrate stronger confidence in healthcare and government institutions compared to commercial and media-based food information sources.

Figure 14. Positive Trust index of food-related information, Dec. 2025

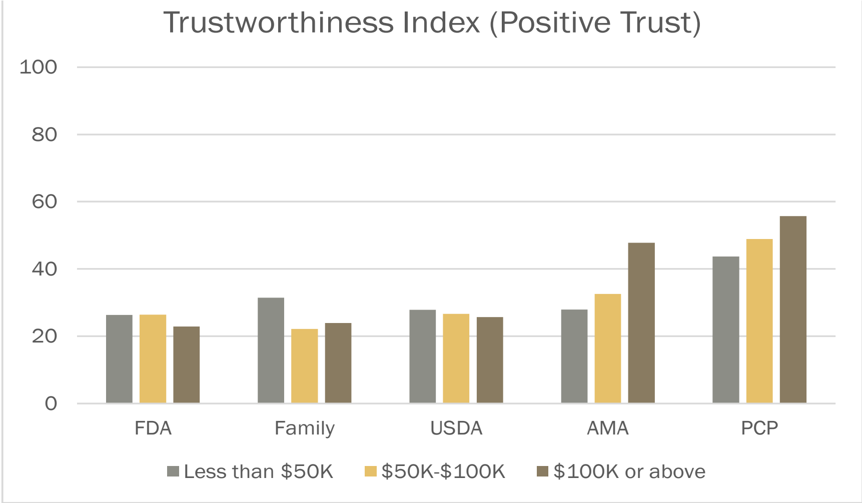
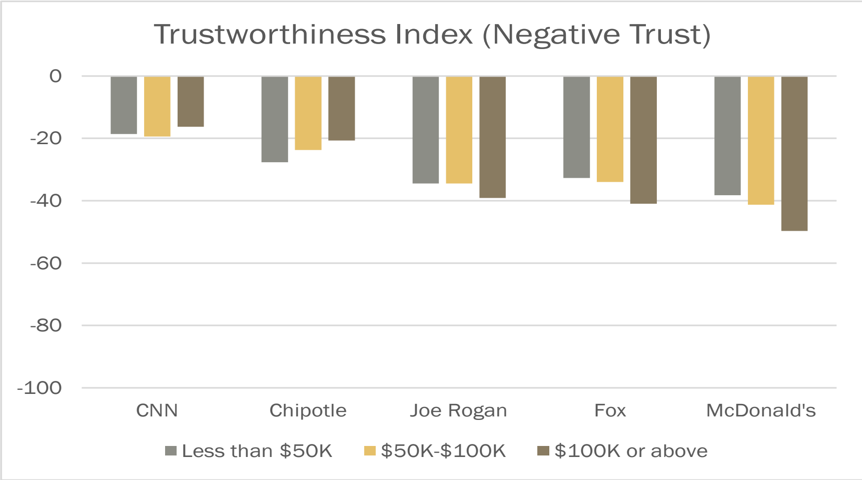


Figure 15. Negavive Trust index of food-related information, Dec. 2025



ENDNOTES

1 Data were collected from an online opt-in panel maintained by the company Dynata over a four-day period from November 17-20, 2025. The eligible population included U.S. adults ages 18+. A weighting method called iterative proportional fitting (or raking) was applied to ensure a demographically balanced sample by age, sex, race, census region, income, and SNAP participation. Population proportions reflect the most recent complete year of ACS census data (2024). Every respondent from the previous month was recontacted and asked to take the survey again. About 46% of October's sample participated this month, thus the rest of the sample was filled in with a new pool of respondents. Data collection for every survey begins on the third Monday of each month, unless otherwise dictated by holidays or extenuating circumstances. This report is released on the second Wednesday of the following month.

2 The Sustainable Food Purchasing (SFP) Index is a self-reported measure of food purchasing designed to assess how well consumer shopping habits align with healthy diets from sustainable food systems, as described by the EAT-Lancet Commission on Food, Planet, Health. A top score of 100 reflects consumer food purchasing that aligns with a set of key recommendations for better nurturing human health and supporting environmental sustainability. The SFP Index includes six components — Nutrition, Environment, Social, Economic, Security, and Taste — correlating with the different strategies for achieving food systems transformation.

3 Food at home (FAH) refers to food sales meant for home or off-site consumption and the value of donations and non-market acquisitions, which is acquired from outlets such as grocery stores, convenience stores, direct sales, etc. Food away from home (FAFH) refers to food sales meant for immediate consumption, federal food programs, and food furnished as an ancillary activity, which is acquired from outlets such as restaurants, bars, schools, etc.

4 The CFI question associated with this response summary specifically asks about future and past grocery prices. The BLS CPI estimate of inflation therefore reflects food-at-home (FAH).

5 High or marginal food security (i.e., food secure): 0-1 reported indications of food-access problems; little indication of change in diet or food intake. Respondents who reported an income above 185% of the federal poverty line were also screened as having high food security. This determination was made according to research by Ahn et al. (2020), which shows that using a modified income-based screening procedure for internet surveys better approximates government estimates of food insecurity. Low food security (i.e., food insecure): 2-4 reported indications of reduced quality, variety, or desirability of diet; little indication of reduced food intake. Very low food security (i.e., food insecure): 5-6 reported indications of disrupted eating patterns, changes in diet, and reduced food intake.

6 Lara-Breitinger KM et al. Validation of a Brief Dietary Questionnaire for Use in Clinical Practice: Mini-EAT (Eating Assessment Tool). J

ENDNOTES

Am Heart Assoc. 2023 Jan 3;12(1):e025064. doi: 10.1161/JAHA.121.025064. Epub 2022 Dec 30. PMID: 36583423; PMCID: PMC9973598.
7 Trust questions were not fielded in the Consumer Food Insights survey from October 2022 - December 2022. Starting June 2025, respondents were allowed to select up to 5 options for "most" and "least" trusted.