



Voice of the Consumer 2026—CEE edition





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Who is today's CEE consumer, and what's driving their choices?

Wealthier, health-focused, and digitally engaged.

A new kind of consumer is taking shape across the region.

Financial confidence is rising, and so is spending power. CEE consumers are also becoming more intentional in their choices. Value for money remains important. Wellbeing, lifestyle, and product transparency matter too. Together, these trends are opening new growth opportunities in food, wellness, personal care, and health-related categories.

Our latest CEE Voice of the Consumer report tracks these shifts. Diets are changing fast. People are choosing fresh, nutritious, and functional foods and reducing processed and high-sugar options. Concerns about pesticides, food processing, and microplastics are pushing demand toward natural, clearly labelled, and less processed products.

Wellbeing has gone mainstream. It's now a core driver of behaviour, shaping how people eat, move, look, and feel. Spending is shifting too, into nutrition, fitness, supplements, beauty, and functional foods. GLP-1 adoption may further reshape demand, with effects on portion sizes, protein-rich products, healthier options, and basket composition.

Digital is also changing the game. AI tools, wearables, and apps now help consumers manage fitness, nutrition, weight, and daily routines. The more personalised the experience, the more willing they are to share their data. For companies offering trusted, tailored, tech-enabled solutions, this is a new competitive arena.

Our report gives retailers and manufacturers the data to act. The intersection of financial confidence, wellbeing, product transparency, and digital engagement is critical for meeting the needs of the evolving CEE consumer.

As financial confidence grows, CEE consumers are rethinking how and where they spend. They prioritise health and wellness and embrace tech and AI

Key themes

▶ Shifting consumer demand as financial confidence grows

- Rising financial security in CEE is strengthening consumer spending capacity: 33% of CEE consumers feel financially secure (up from 27% in 2025).
- Healthier diet trend in CEE is evolving faster than in Western Europe.
- Higher intake of fresh fruits and vegetables (55%) and supplements (36%), reduced consumption of processed and high-sugar foods (48%) and alcohol (36%).
- Nutritional transparency—increasing demand for clearly labeled, nutrition-led products.
- Food safety concerns around pesticides (54%), food processing (51%), and microplastics (48%) reinforce demand for safer, more natural, and less processed products.

▶ Wellness takes focus in evolving shopper lifestyles

- Wellbeing is rising on the CEE agenda, led by longevity, stress reduction, and sleep quality.
- Top barriers to wellbeing: stress, fatigue or low energy (63%), time constraints (53%), low motivation (52%), and cost (52%).
- Wellbeing goals are driving category preference, with nutrition-related products leading interest at 85%.
- Within nutrition, healthy food and beverages attract the strongest interest (38%).
- Price remains decisive in wellness purchases: cost (72%) and value for money (69%) are the top drivers.

▶ Consumer health is reshaping consumption and spending

- CEE consumers are highly health-engaged, yet only 26% rate their health as good.
- Health routines are led by outdoor activity and exercise: 64% active outdoors, 44% exercising, 32% nutrition and diet planning.
- Health priorities translate into spend: strong demand for supplements (71%), beauty treatments (31%), and specialty health foods (30%).
- GLP-1 adoption is already comparable across Europe—WE (15%) and CEE (13%). It's likely to further reshape consumption: smaller portions, more protein, healthier foods.

▶ Wearables, apps and AI emerge as a new competitive area

- Wearables and health apps are gaining traction across fitness, nutrition, weight, and medication reminders. This is supported by openness to personal data sharing
- AI is becoming a key entry point for health information, used by 47% of CEE consumers and 36% in WE.
- AI use cases are expanding into everyday support: training plans, nutrition guidance, and preliminary health assessments.
- For retailers and brands, this creates a new area around trusted, personalised, tech-enabled solutions.

Key numbers



Financial confidence is raising, spending capacity is strengthening, and the retail market is growing.

33%

are in the most financially secure customer group in CEE—6 pp higher than a year ago.



Consumers in CEE are shifting toward healthier diets, with 33% frequently planning their nutrition.

55%

plan to eat more fresh fruit and vegetables.



Many CEE consumers link health and wellness with dietary supplements.

53%

use supplements regularly, and 36% plan to spend more on them next year.



GLP-1 medications are gaining popularity in Europe.

13%

of consumers in CEE report using or having used them. Their adoption is driving changes in eating habits.



Technology is taking a bigger role in health and wellness across CEE.

60%

use wearable devices, health apps, and AI for pre-visit health assessments.

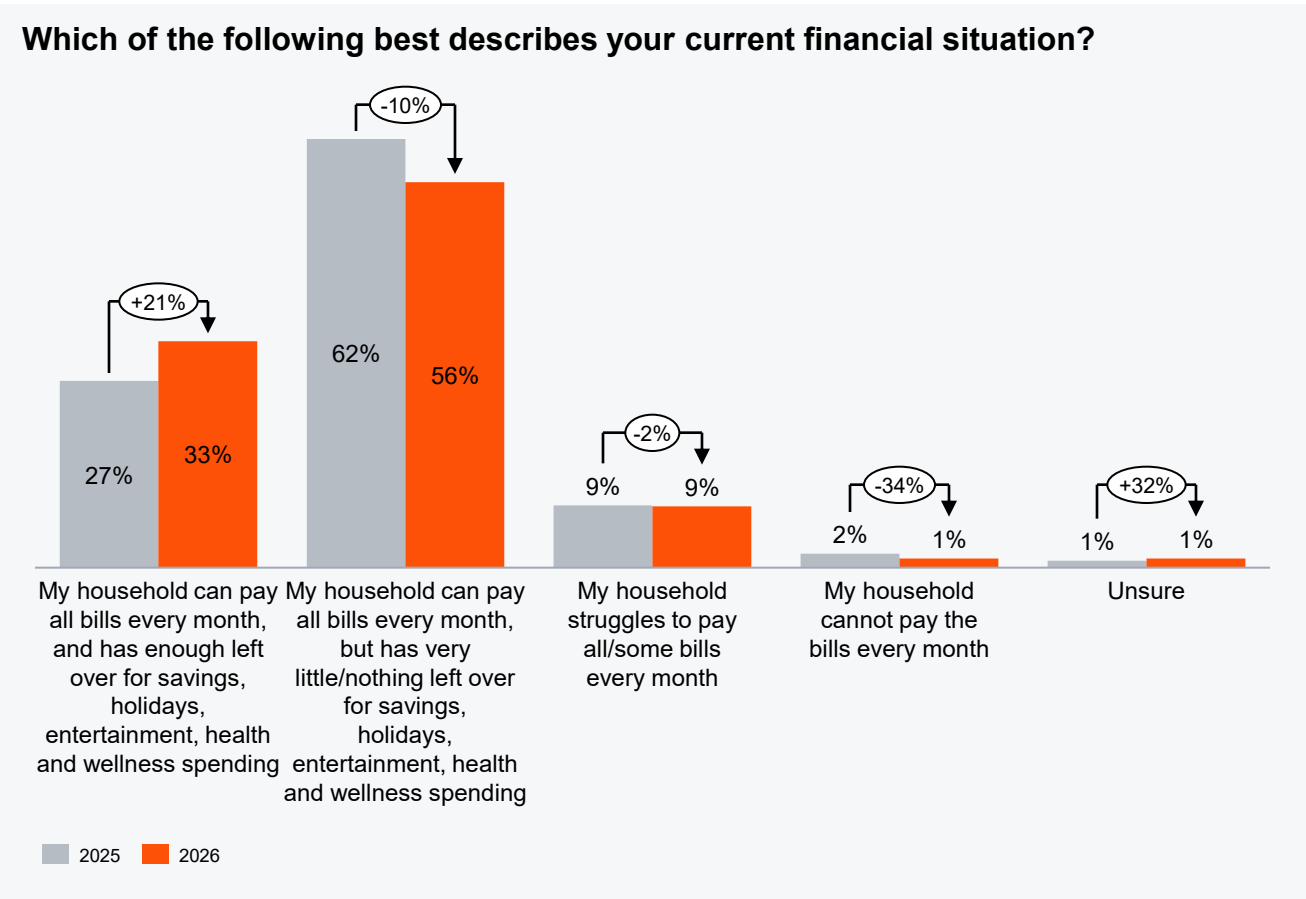
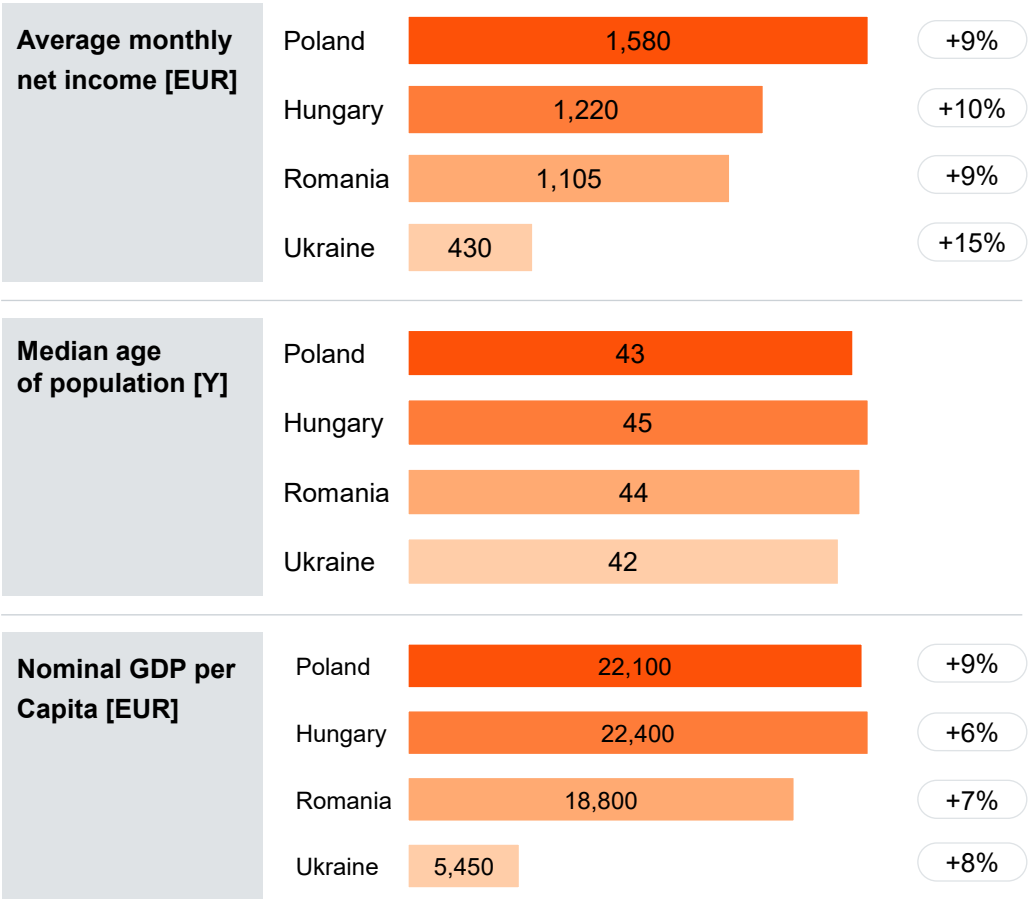


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Shifting consumer
demand as financial
confidence grows

Financially secure segment in CEE grew from 27% to 33% in a year. It's a signal of strengthening regional prosperity

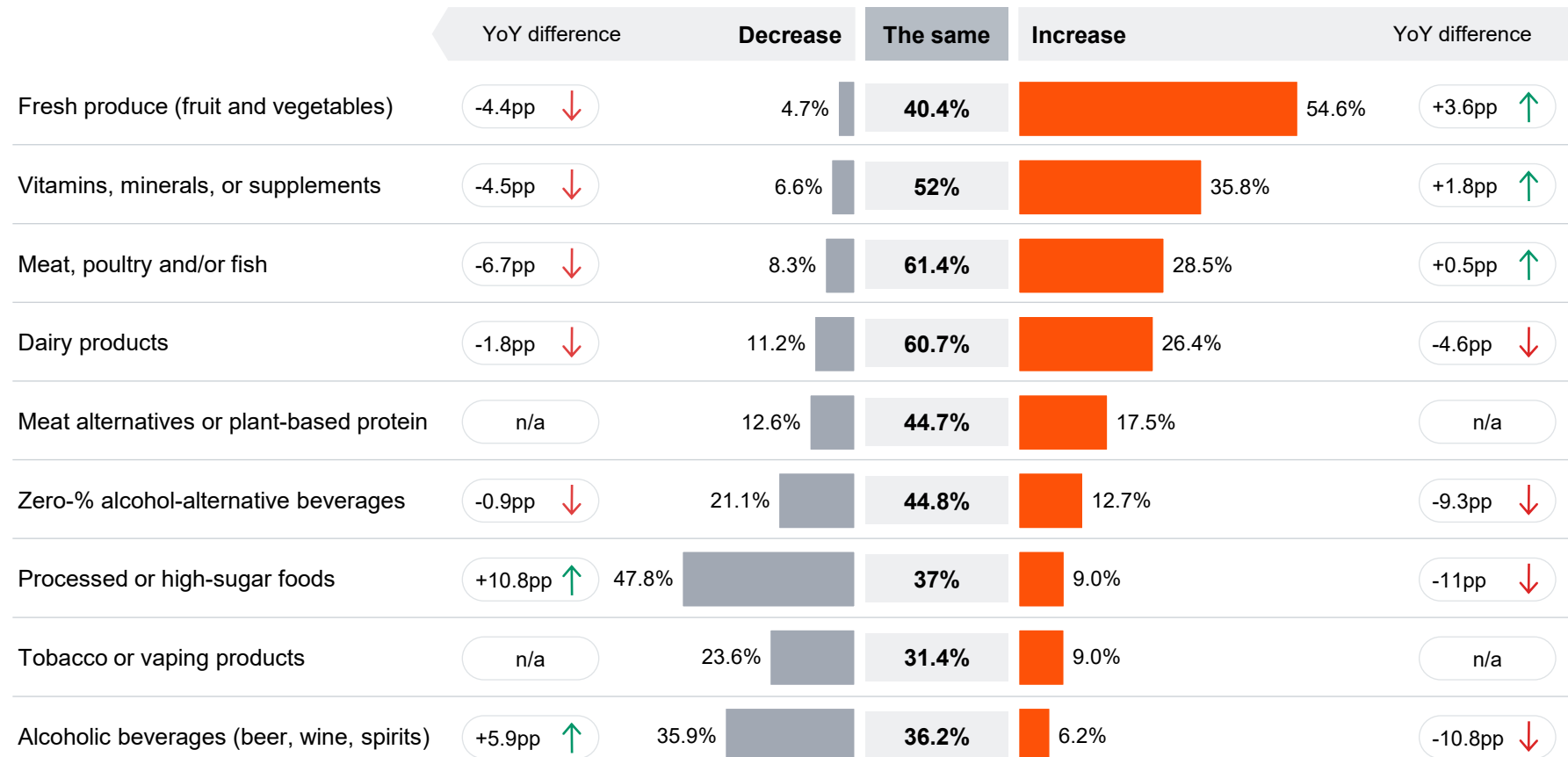
Overview of the CEE consumer profile



Consumers in CEE are choosing healthier diets. They're prioritising fresh produce and cutting back on alcohol and processed foods

Predictions about everyday consumer categories spending over the next 12 months in CEE

Thinking about the next 12 months, how do you anticipate your consumption will change in each of the following categories?

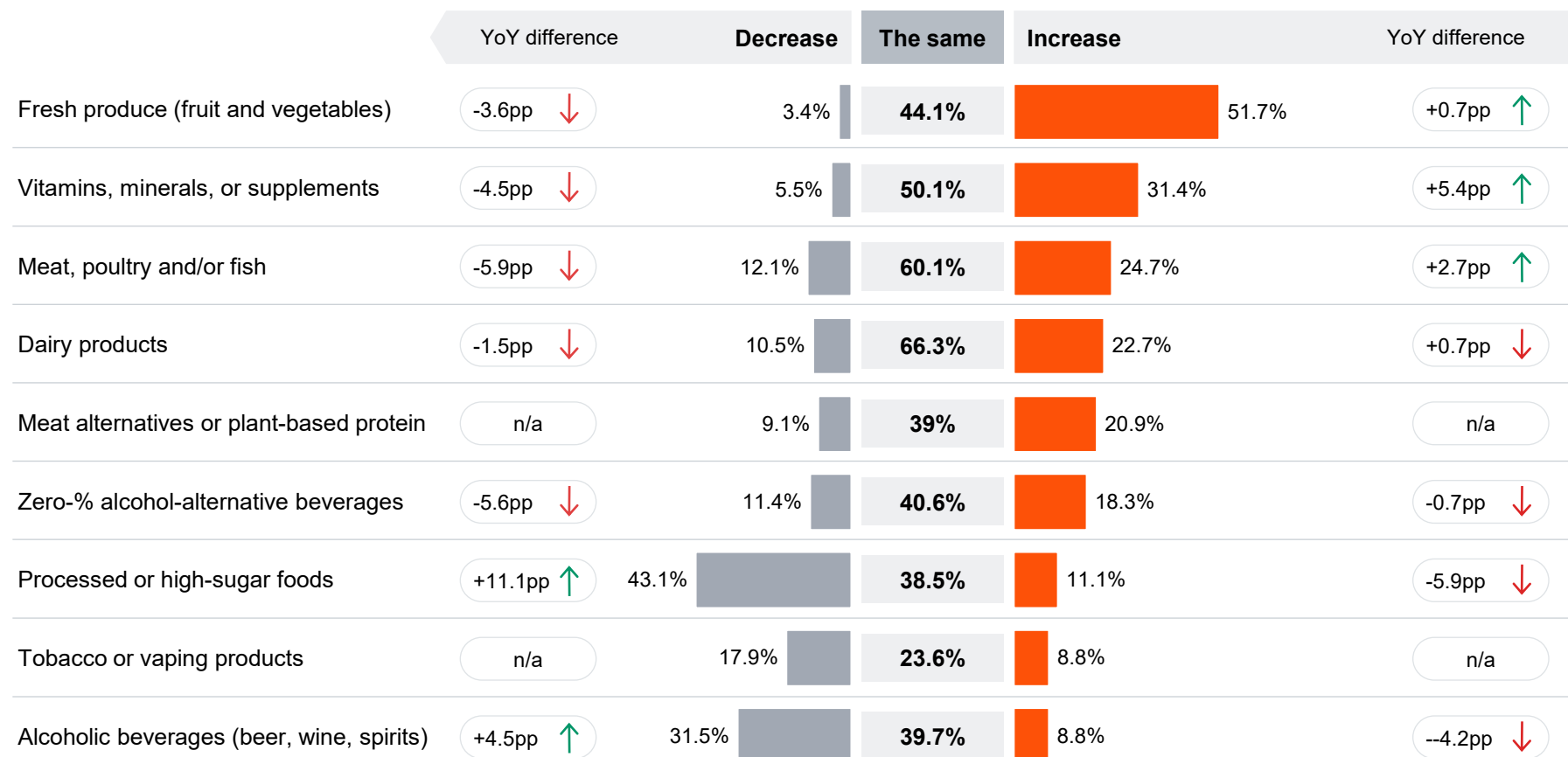


- ▶ CEE consumers plan to spend more on:
 - fresh produce, including fruit and vegetables (55%)
 - meat and fish (28.5%)
 - dairy (26%)
 - supplements (36%).
- ▶ They plan to spend **less** on:
 - processed and high-sugar foods (48%)
 - alcohol (36%).
- ▶ A focus on healthier diets and increasing health and wellness awareness in CEE is continuing trends seen in previous years.
- ▶ Retailers and FMCG producers will need to reshape their portfolios with fresher, more nutrient-dense products that match what consumers want.

Consumption shifts in CEE are converging with Western Europe and moving faster. The growth potential of healthy food categories is getting stronger

Predictions about everyday consumer categories spending over the next 12 months in Western Europe

Thinking about the next 12 months, how do you anticipate your consumption will change in each of the following categories?



▶ Western European trends broadly mirror what we see in CEE, continuing patterns from previous years.

▶ Spending is **rising** on:

- fruits and vegetables (52%)
- meat or fish (25%)
- dairy (23%)
- supplements (31%).

▶ Spending is **declining** on:

- processed or high-sugar foods (43%)
- alcohol (31.5%)

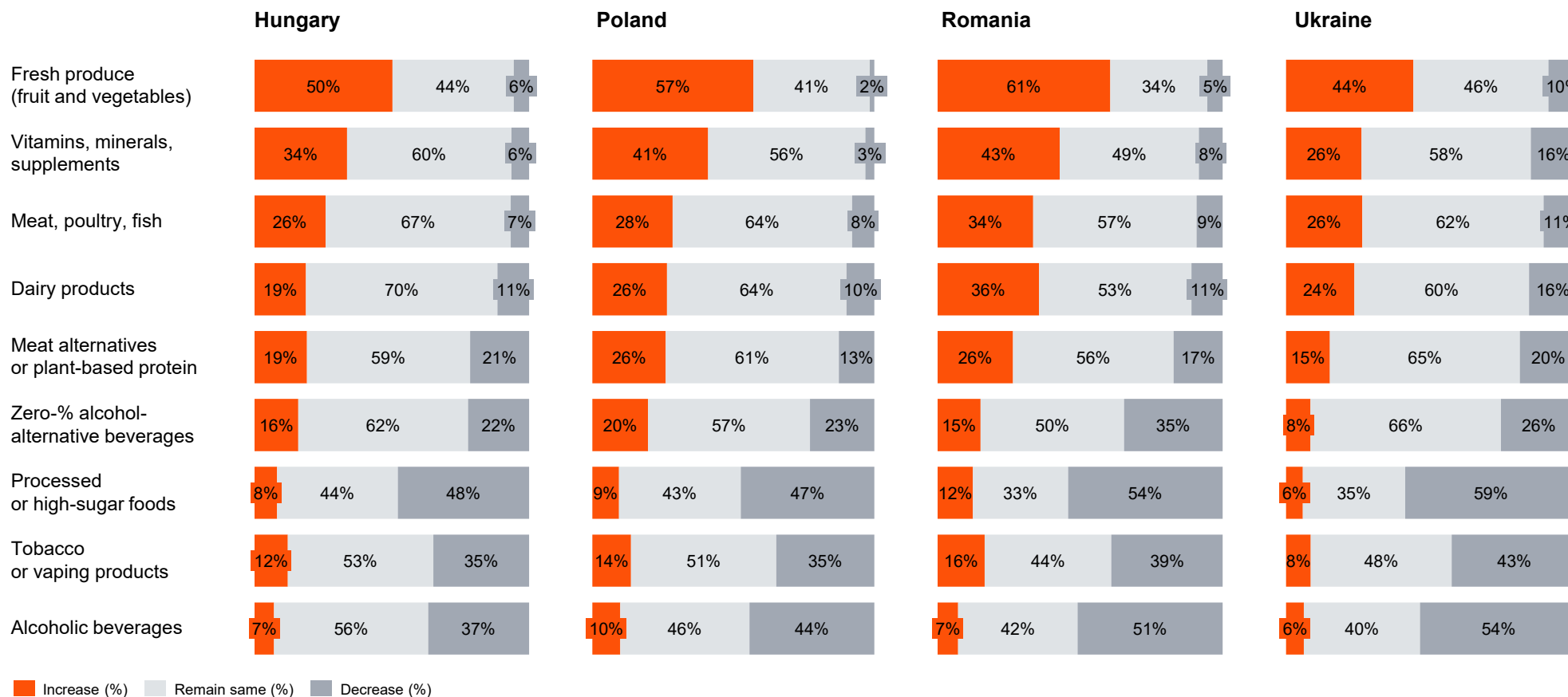
▶ As Western Europe is a more mature market, the pace of change is slower there. CEE continues to converge toward these trends.

Romania leads CEE in planned fresh food consumption.

Ukraine shows the sharpest drop in alcohol and highly processed foods

Predictions about everyday consumer categories spending over the next 12 months in CEE

Thinking about the next 12 months, how do you anticipate your consumption will change in each of the following categories?

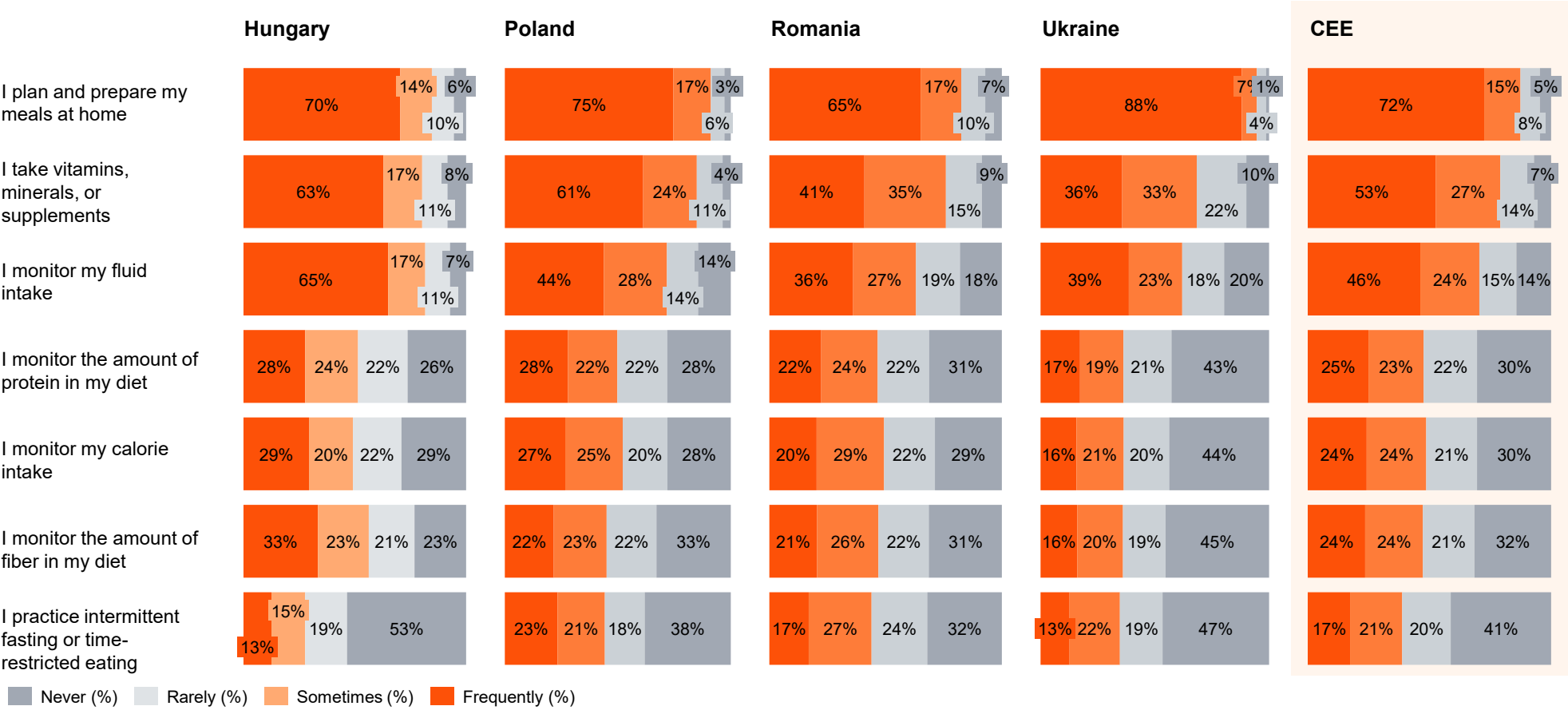


- ▶ Poland and Romania stand out across CEE for growth in fresh produce, including fruit and vegetables, meat and fish, and dairy.
- ▶ Both markets also lead in supplements, with planned spending up 41% in Poland and 43% in Romania.
- ▶ Ukraine recorded the largest decline in the consumption of alcohol (54%) and processed or high-sugar foods (59%).

A growing focus on protein, vitamins, fiber, and calories is pushing CEE consumers toward more transparent and nutrition-focused offerings

Nutrition-related consumer habits in CEE

How often do you engage in the following health and nutrition related habits?

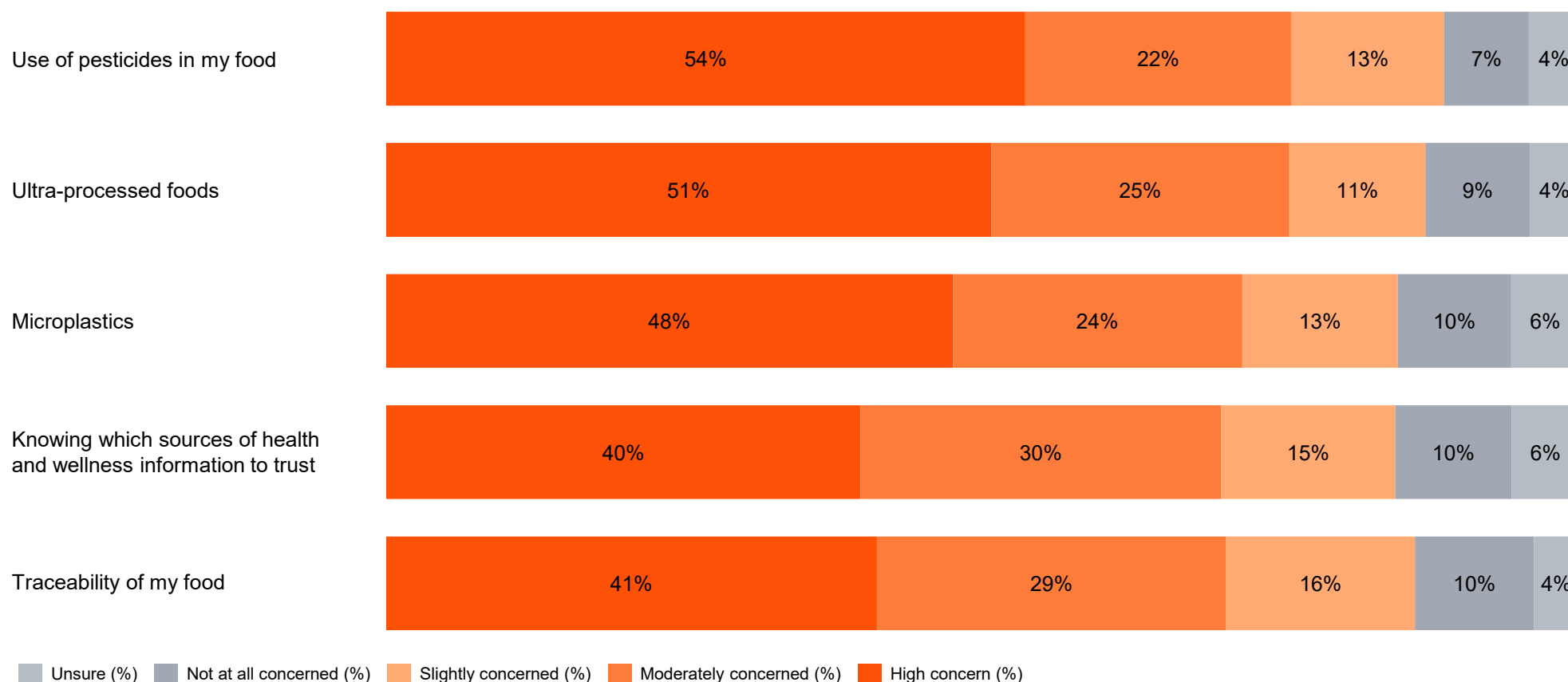


- ▶ A key emerging trend in CEE: frequent monitoring of nutritional intake, particularly vitamins (53%), protein (25%), fiber (24%), and calories (24%).
- ▶ This is driving demand for transparent, nutrition-focused products, such as high-protein products or vitamin-enriched beverages.
- ▶ Home cooking remains widespread, though it may be partly constrained by the growing popularity of ready-to-eat food.

Pesticides, food processing, and microplastics are top CEE consumer concerns. Natural, minimally processed products, and glass packaging offer producers a clear way to stand out

Food-related concerns of customers in CEE

To what extent are you concerned, if at all, about the following factors in terms of their impact on your health and wellbeing?

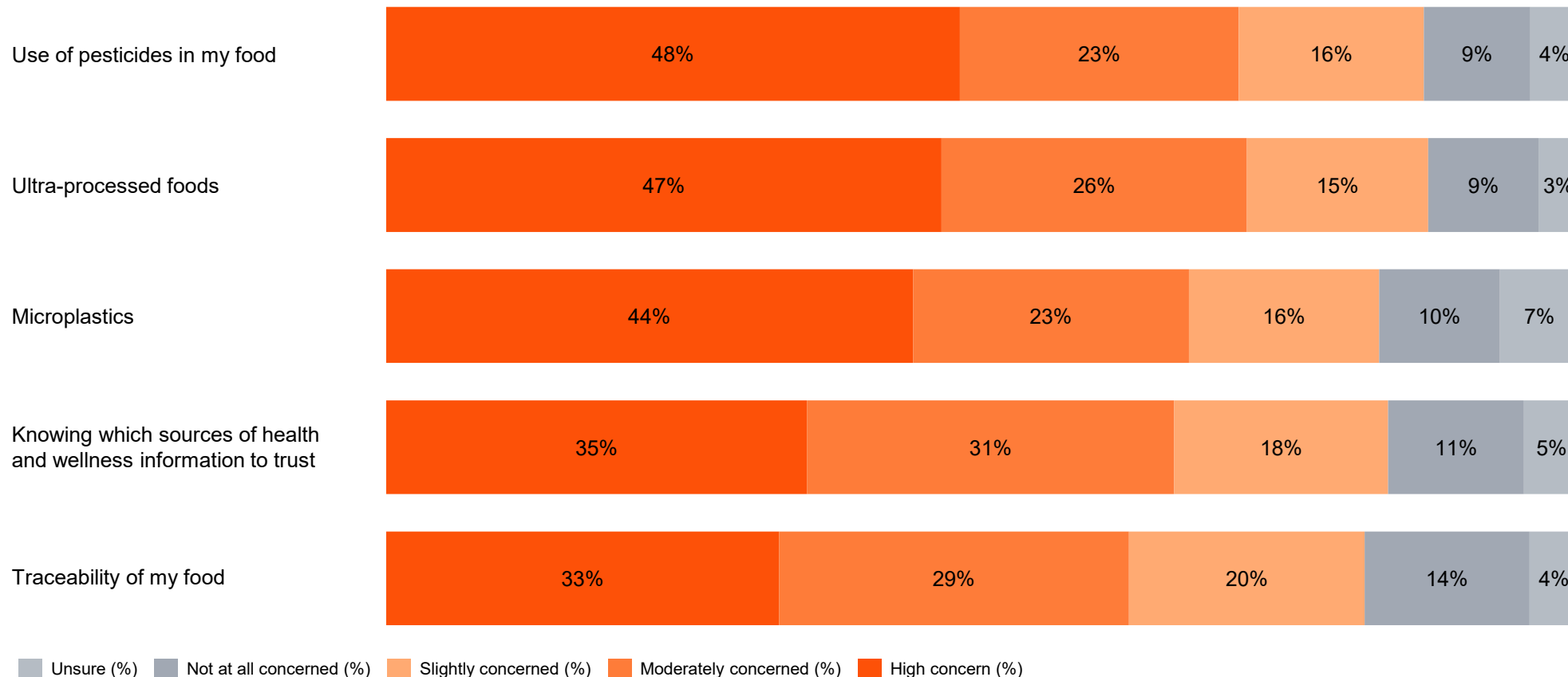


- ▶ CEE consumers are most concerned about what's in their food, particularly pesticides (54%), level of processing (51%), and microplastics (48%).
- ▶ Concerns about food traceability and trust in information sources rank lower.
- ▶ Food producers should lean into more natural and less processed products, and rethink packaging to cut plastic, with glass and other materials leading the way.

Consumers in Western Europe are slightly less concerned about pesticides, food processing, and microplastics than in CEE

Food-related concerns of customers in Western Europe

To what extent are you concerned, if at all, about the following factors in terms of their impact on your health and wellbeing?



► Food-related concerns in Western Europe sit slightly below CEE levels:

48% are concerned about pesticides

47% about the level of processing

44% about microplastics.

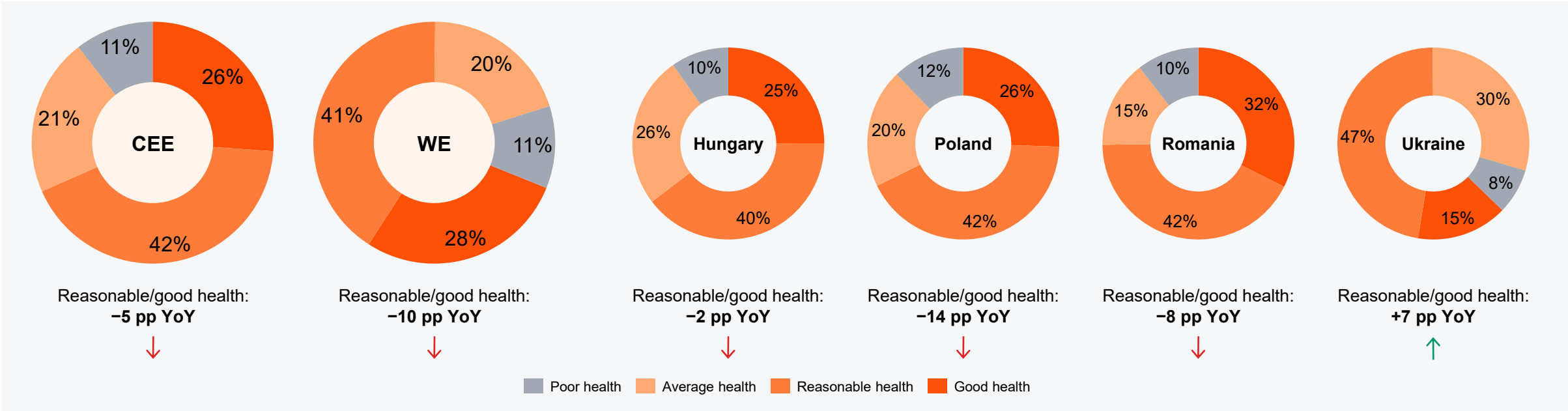
► As in CEE, trust in information sources (35%) and food traceability (33%) rank lower on the list.



Consumer health is reshaping consumption and spending

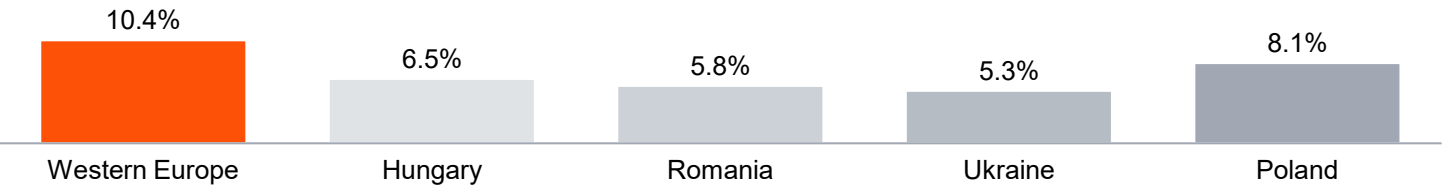
26% of consumers in CEE rate their general health as good.
Poland and Romania report the highest levels in this matter

Health perceptions in CEE



CEE countries are spending less on health than Western Europe. But the gap is narrowing as financial security across the region grows.

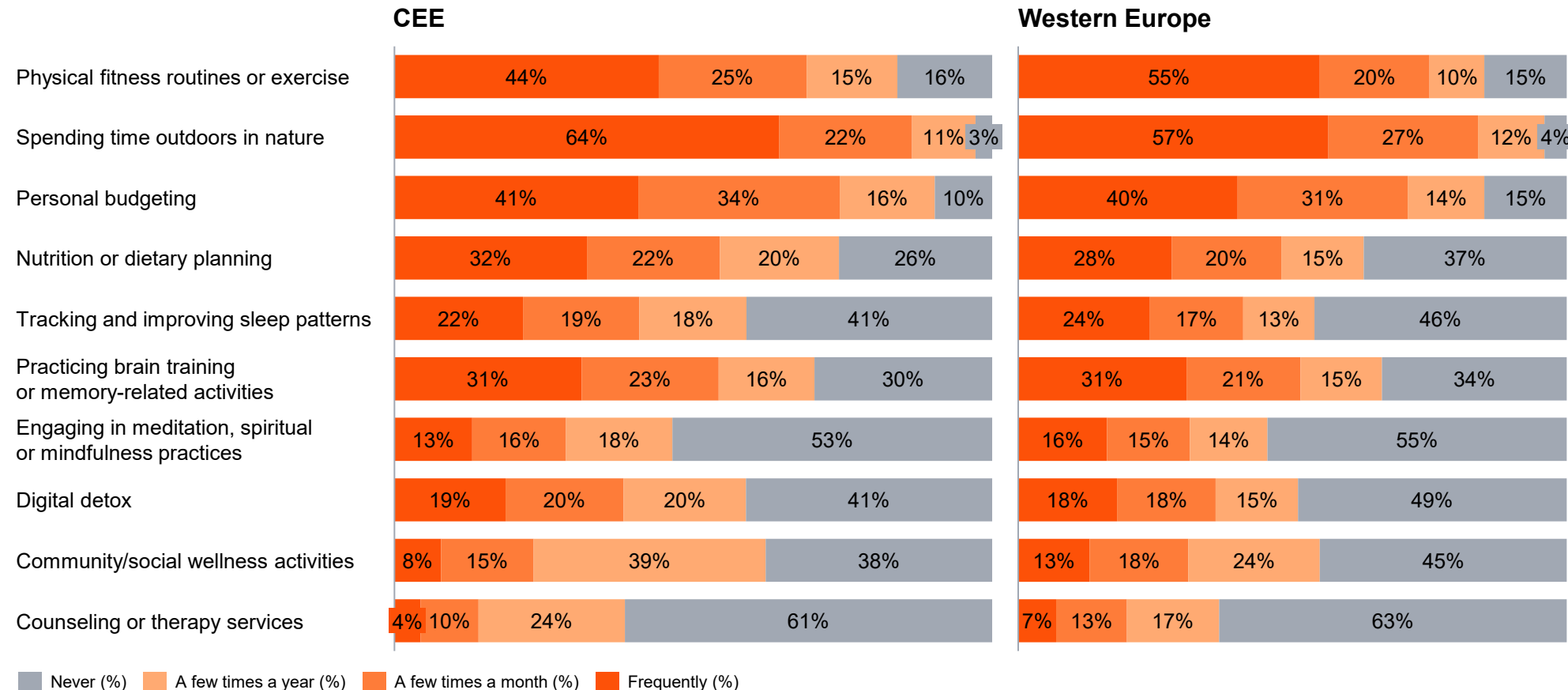
Health expenditure as percentage of GDP (% , 2024)



Outdoor activities and exercise top the list of frequent health-related activities in CEE

Health-related activities

How often, on average, do you practice the following health-related activities?

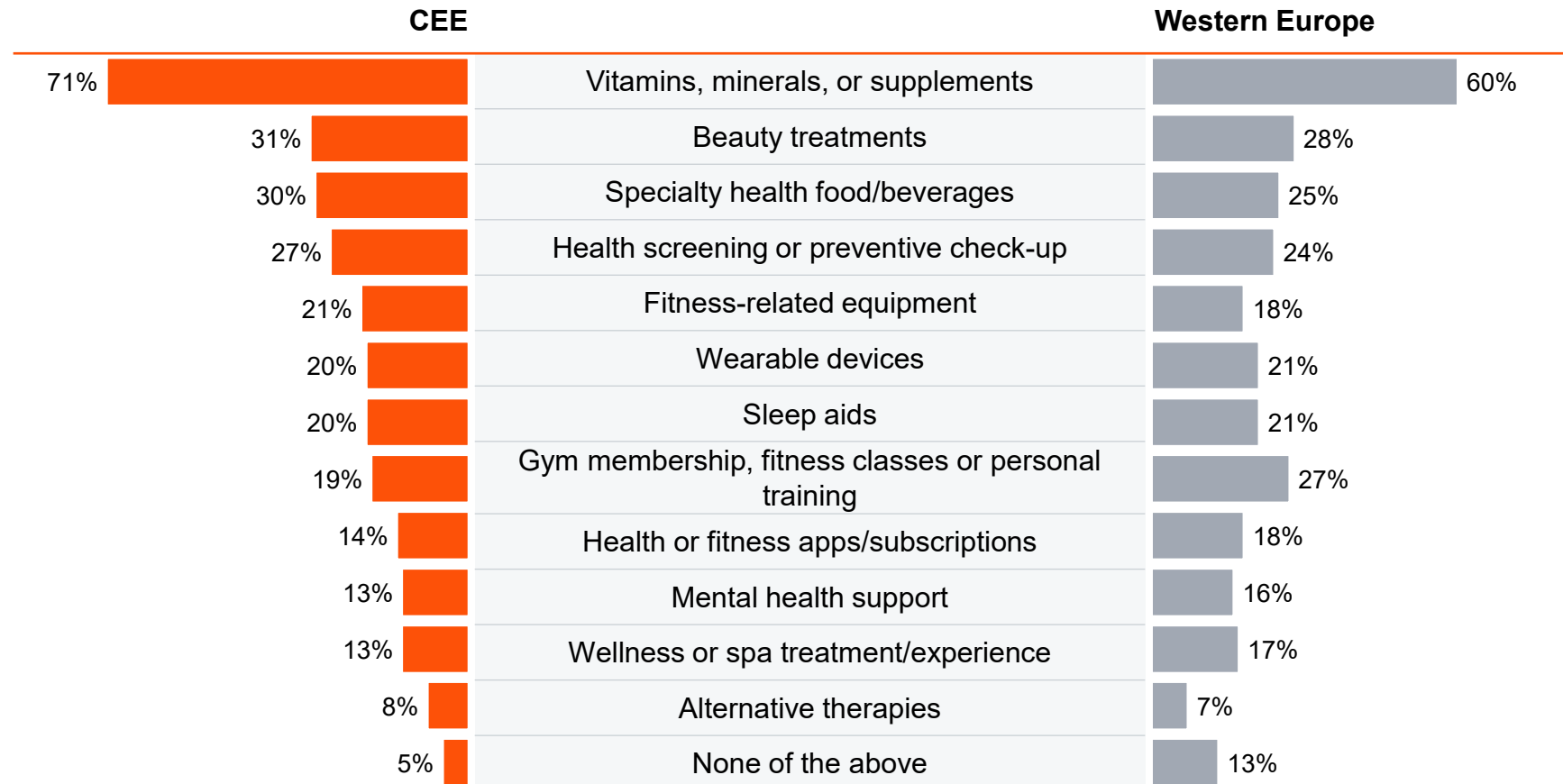


- ▶ Spending time outdoors is the most frequent health activity in CEE (64%), followed by physical fitness (44%) and personal budgeting (41%).
- ▶ Nutrition and diet planning is a regular habit for 32% of CEE consumers.
- ▶ Strong engagement in active lifestyles, combined with higher price sensitivity, is linked to demand for affordable, convenient and functional products.

Health focus is translating into spending across CEE. Supplements are the top priority, with beauty treatments and specialty health foods following

Purchases that support personal health

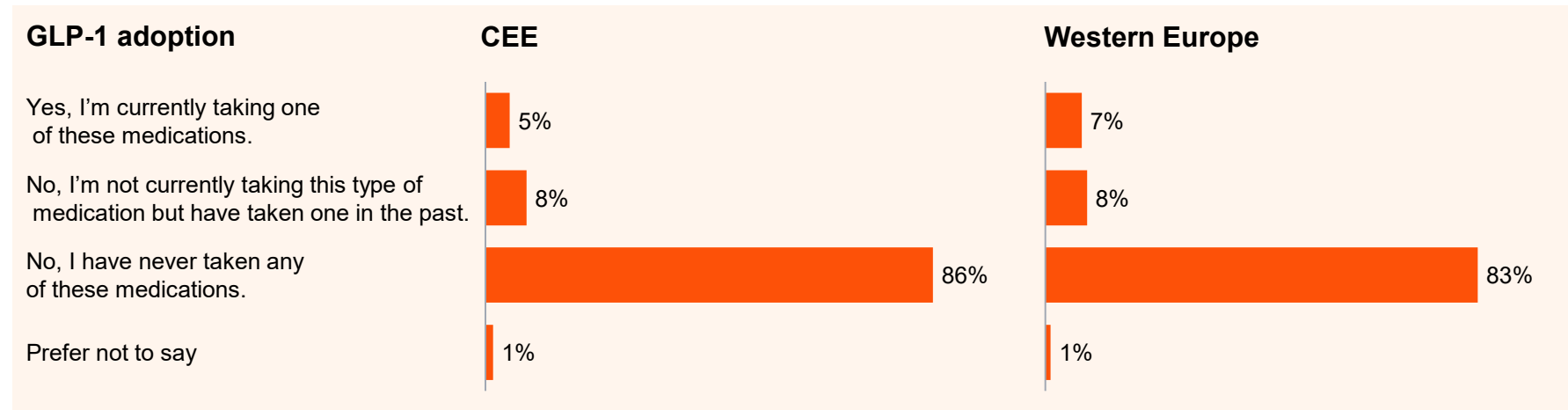
Thinking about the last 12 months, which of the following discretionary purchases have you made to support your personal health and wellbeing?



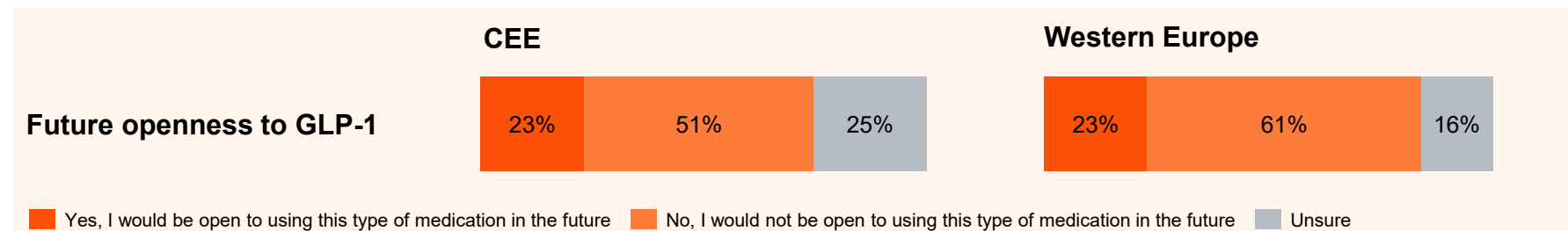
- ▶ Vitamins and supplements are the clear leader in CEE at 71%, nearly 11 pp ahead of Western Europe (60%).
- ▶ Beauty treatments rank second in CEE (31%) and Western Europe (28%), showing consistent demand across regions.
- ▶ The third place in CEE is specialty health food and beverages (30%). In Western Europe, it's sports activities (27%), and specialty food and beverages comes fourth at 25%.
- ▶ The strength of supplement purchasing across both regions suggests health management is closely tied to dietary supplement use. It's a growth opportunity for producers and retailers in nutrition-focused and functional food categories.

GLP-1 adoption is already gaining traction in both regions.
Current use stands at 15% in Western Europe and 13% in CEE

Do you currently take a GLP-1 prescription medication for type 2 diabetes and/or weight loss?



Would you be open to taking a GLP-1 prescription medication for type 2 diabetes and/or weight loss in the future?

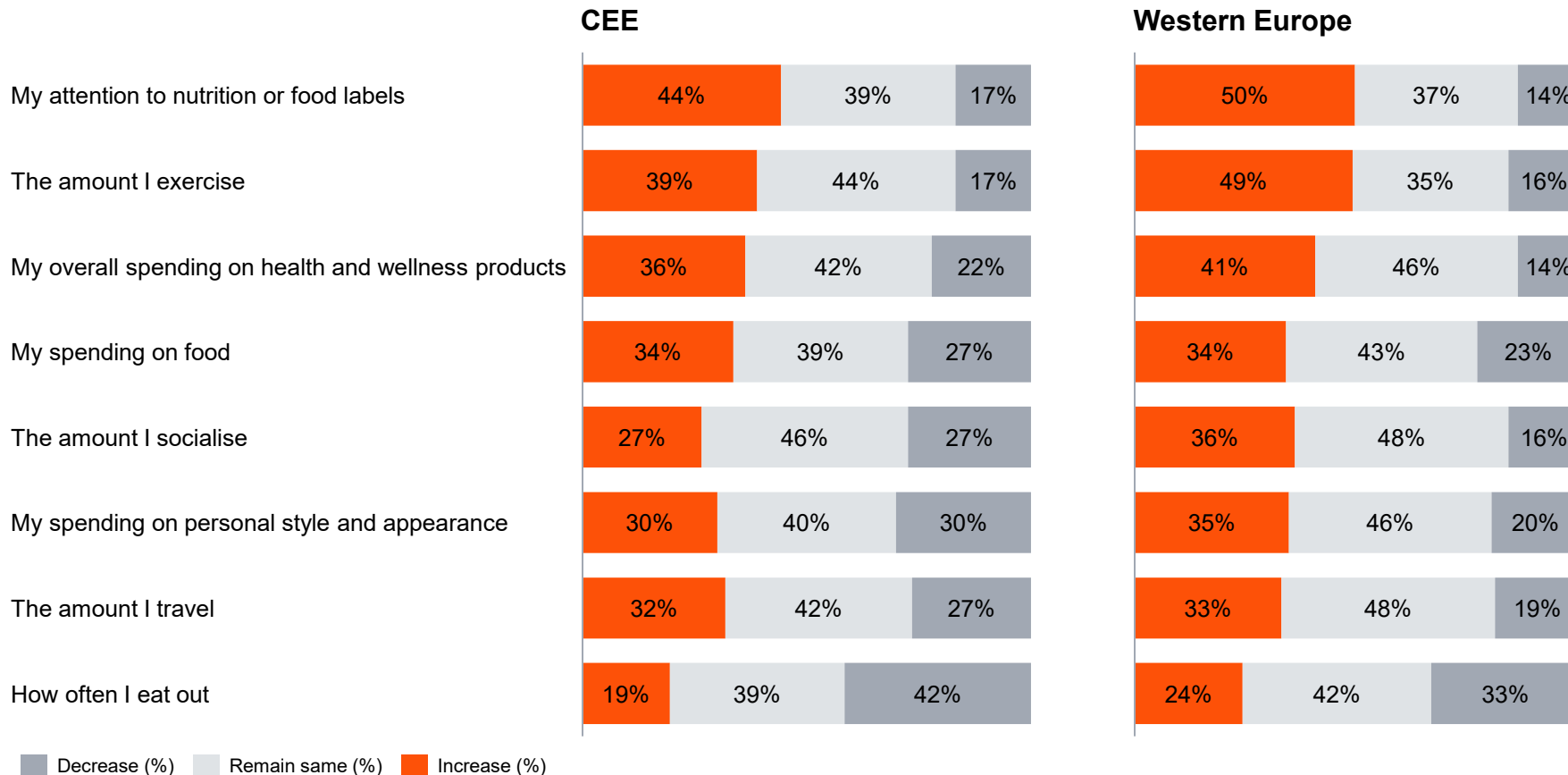


- ▶ GLP-1 medications for type 2 diabetes and weight loss are becoming more common across Europe.
- ▶ In CEE, 13% of consumers currently use or have used GLP-1 medications. A further 23% would be open to using them in future, though 51% say they would not.
- ▶ Western Europe shows slightly higher current adoption at 15%, with 23% open to future use and 61% not open to it.
- ▶ Similar usage levels were observed in the US around two years ago. Early signs suggest Europe can follow a similar trajectory, but it will depend on factors including healthcare access, regulatory environment and more.

Some of GLP-1 users are focusing more on nutrition, eating out less, and increasing spend for healthier product options

Behavioral and activity changes following GLP-1 use

Since using these weight-loss prescription medications, how, if at all, have each of the following behaviors or activities changed for you?



- ▶ The use of GLP-1 medications is having an impact on health-related behaviors among consumers in Europe.
- ▶ The most notable changes relate to eating habits:
 - greater attention to nutrition and food labels (44% in CEE)
 - increased spending on food (34% in CEE)
 - eating out less (42% in CEE)
 - exercise more (39% in CEE).
- ▶ For those experiencing changes, the pattern is consistent: greater focus on nutrition, more conscious food choices, and smaller portions.

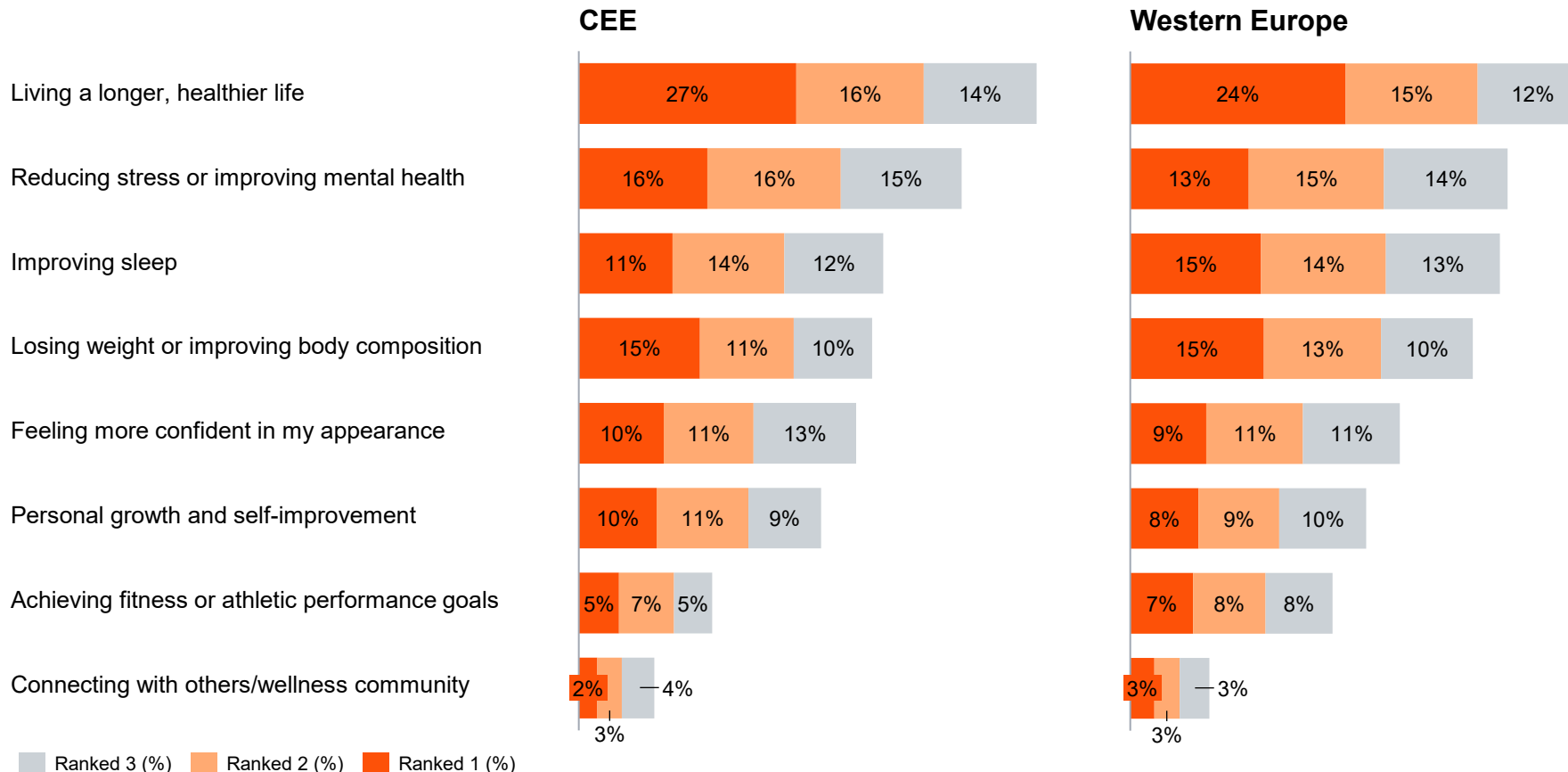


Wellness takes focus in evolving shopper lifestyles

Longevity, stress reduction, and sleep quality are getting greater emphasis among wellness goals in CEE and Western Europe

Wellness-related consumer goals

Considering your current health and wellness, which of the following, if any, best represents your primary goals (i.e. specific aims or desired outcomes that you intend to achieve)?

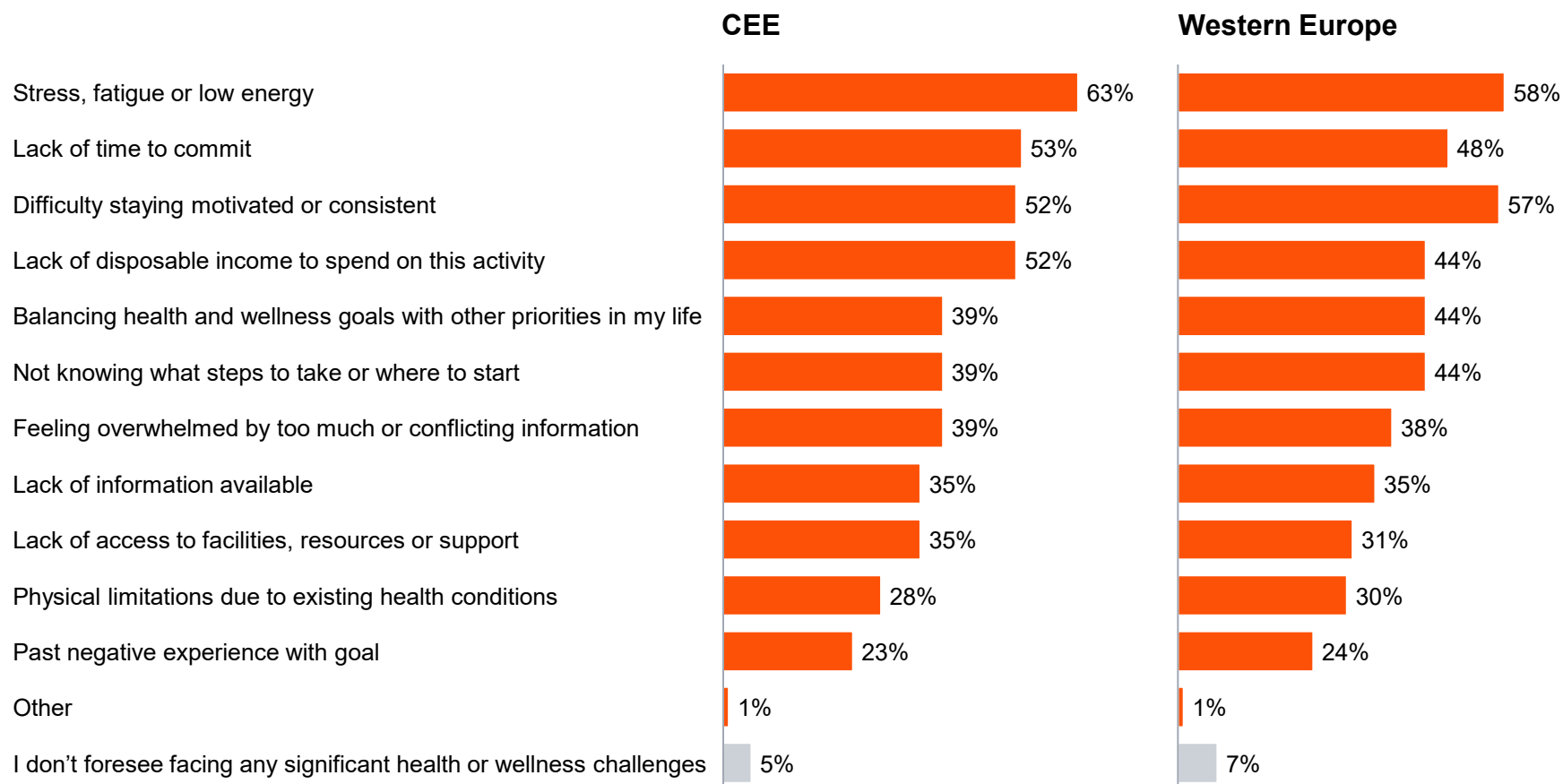


- ▶ Longevity and overall health are the primary wellness goals in both regions. CEE consumers rank it first at 27%, with Western Europe at 24%.
- ▶ Other key goals include stress reduction, mental health, and improving sleep quality.
- ▶ European consumers want more than general wellness. They're actively seeking functional activities and products that address specific lifestyle and wellbeing needs. Producers may think about mood-supporting teas or sleep-enhancing beverages.

Stress, fatigue, and low energy are the key barrier to wellbeing goals in CEE and Western Europe

Wellness-related consumer goals challenges

Thinking about your health and wellness goal, which of the following challenges, if any, do you face in achieving each of them?

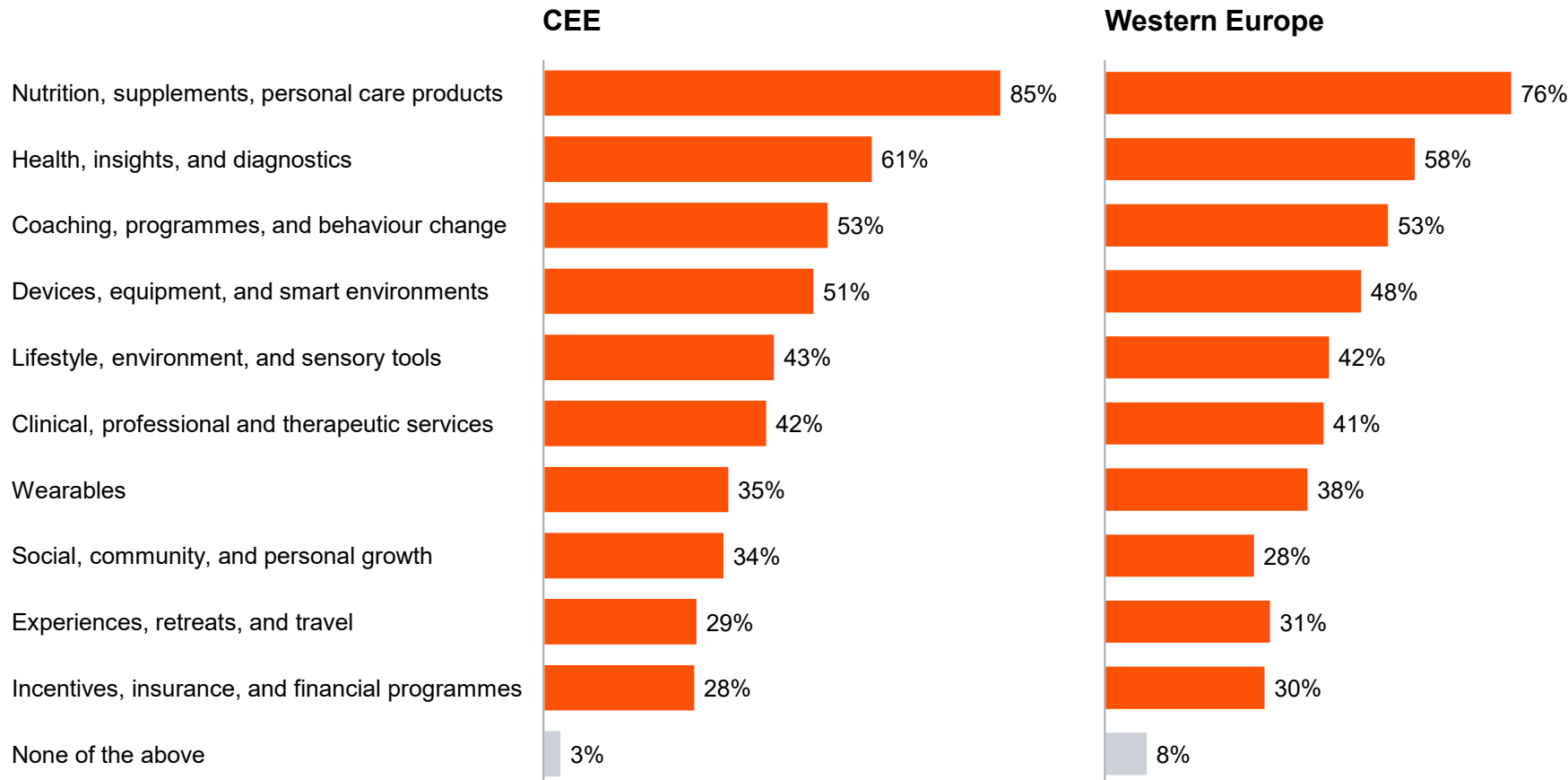


- ▶ The main obstacles to achieving wellness goals in CEE are stress, fatigue and low energy (63%), followed by lack of time (53%), motivation challenges (52%), and financial constraints (52%).
- ▶ In Western Europe, the leading challenges are stress and low energy (58%) and lack of motivation (57%), while financial constraints are less significant, affecting 44% of consumers.
- ▶ CEE consumers face higher price sensitivity across the board. For retailers and brands, this means tailoring wellness product pricing.

Wellbeing goals are translating into clear category preferences. Nutrition and personal care products lead at 85% in CEE vs 76% in Western Europe

Product/service categories related to consumer wellness goals

Proportion of respondents interested in each product/service category

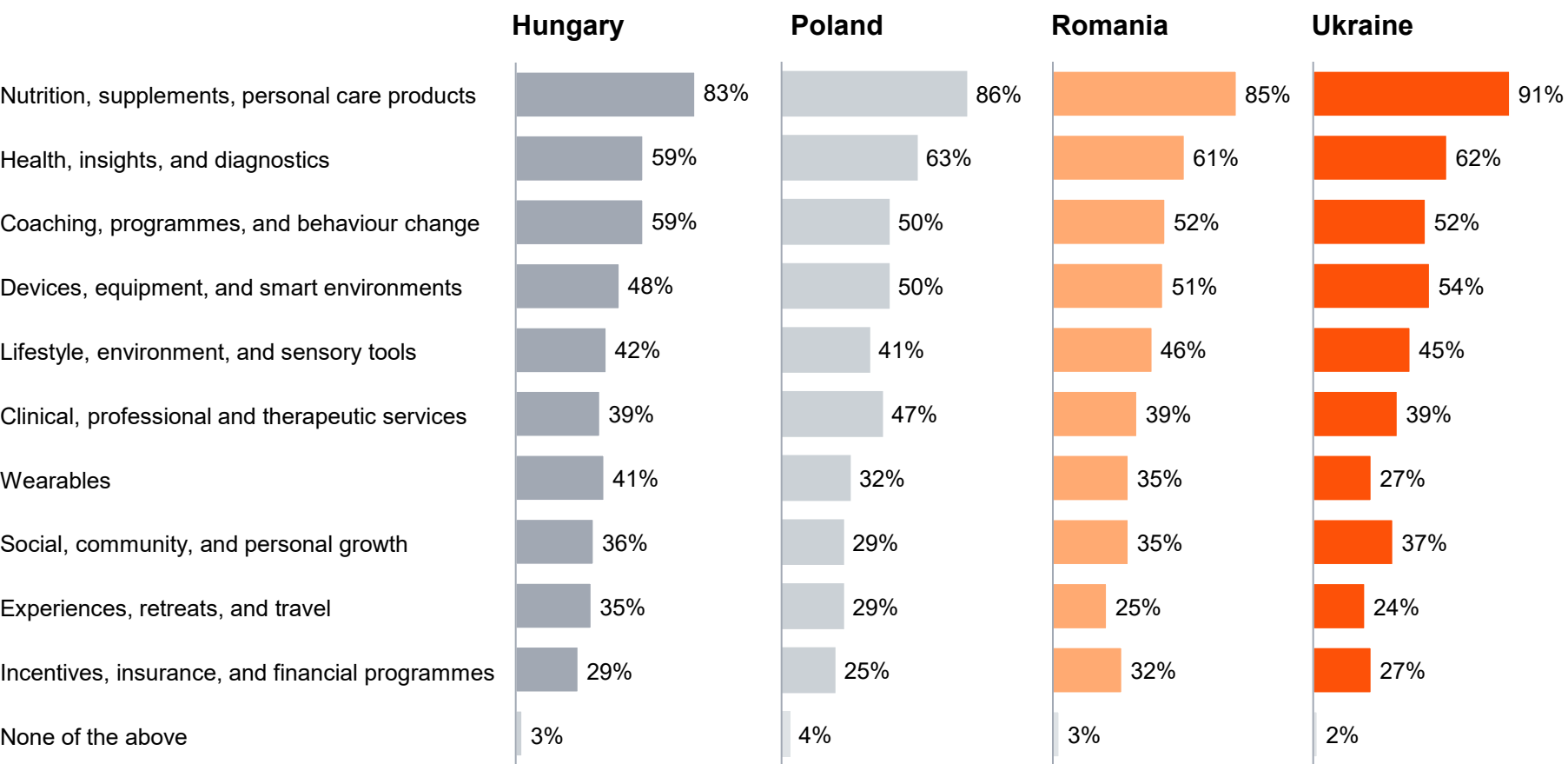


- ▶ In CEE, interest in wellness products is strongest in nutrition, supplements and personal care (85%), ahead of Western Europe (76%).
- ▶ Health insights and diagnostics come next (61%), followed by coaching (53%) and devices and equipment (51%). Across these categories, CEE matches or exceeds Western Europe's interest levels.
- ▶ Western Europe shows higher interest mainly in more premium categories, such as wearables (38%) and experiences and travel (31%).
- ▶ Wellness awareness in CEE is growing and catching up with Western Europe, but lower purchasing power limits spending on more expensive products.

Nutrition and personal care products attract the strongest interest within lifestyle-related purchases in CEE. Ukraine leads at 91%, followed by Poland at 86%

Product/service categories related to consumer wellness goals

Proportion of respondents interested in each product/service category

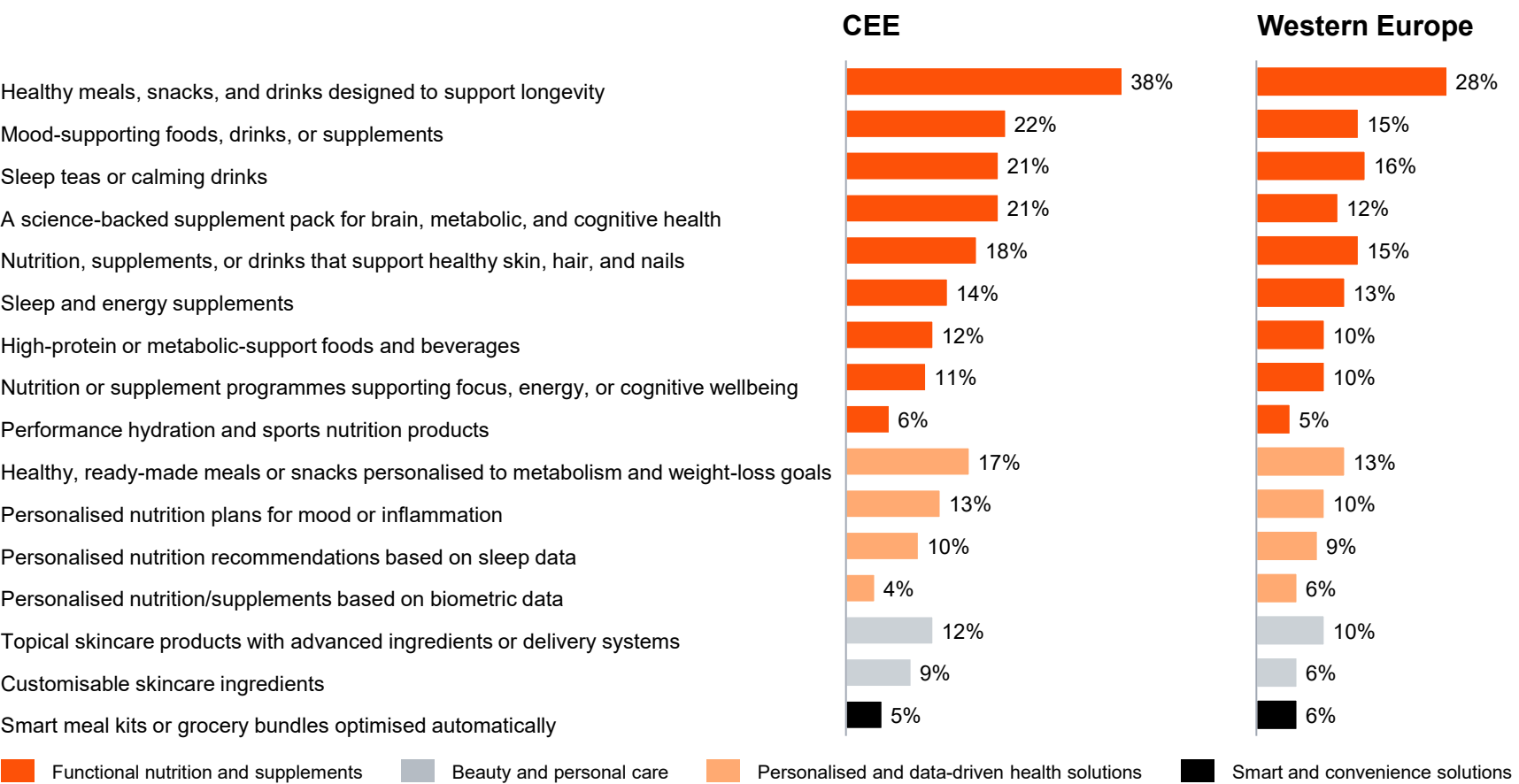


- ▶ Across CEE countries, the nutrition, supplements, and personal care stand out among wellness products. It outperforms the second-ranked category, health insights, and diagnostics, by over 20 pp.
- ▶ Ukraine shows the highest interest in nutrition products at 91%, with 66% of consumers having already purchased or showing strong intent to buy. For the remaining 25%, this interest hasn't yet translated into consumption or spending.
- ▶ In other CEE countries, interest in this category is relatively similar, ranging from 83% to 86%.

Healthy food and beverages lead interest within nutrition and personal care products, with 38% in CEE vs 28% in Western Europe

Consumer interest in nutrition, supplements, and personal care products

Proportion of respondents interested in each product/service (nutrition, supplements, and personal care products)

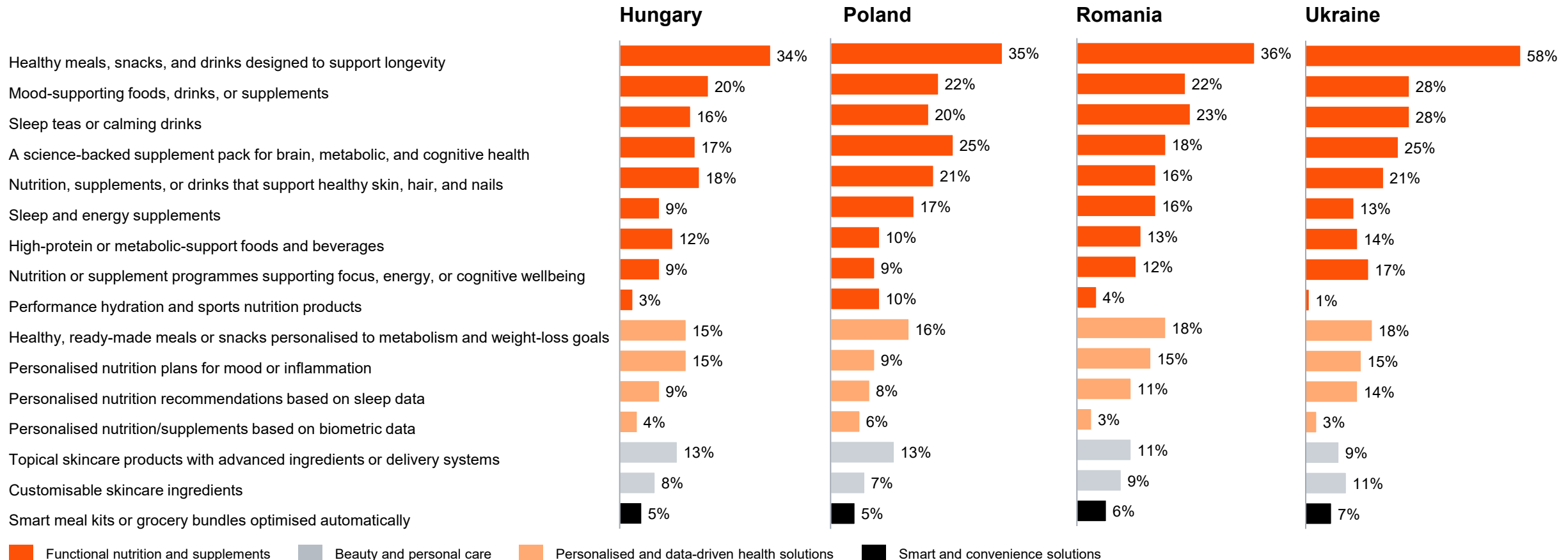


- ▶ Within nutrition, supplements and personal care, functional nutrition and supplements are the most sought-after subcategories.
- ▶ In CEE, key offerings are longevity-supporting foods (38%) and functional products targeting mood (22%), sleep (21%), and cognitive health (21%).
- ▶ Personalised, data-driven products and beauty-oriented solutions are also gaining traction in CEE.
- ▶ Across most product types, consumer interest in CEE exceeds Western Europe. It's strong momentum and convergence toward Western trends.
- ▶ This creates an opportunity for producers in CEE to expand into functional, personalised, and beauty-oriented offerings.

Healthy meals and drinks supporting longevity are the most popular within the category in CEE, with the highest uptake in Ukraine at 58%

Consumer interest in nutrition, supplements, and personal care products

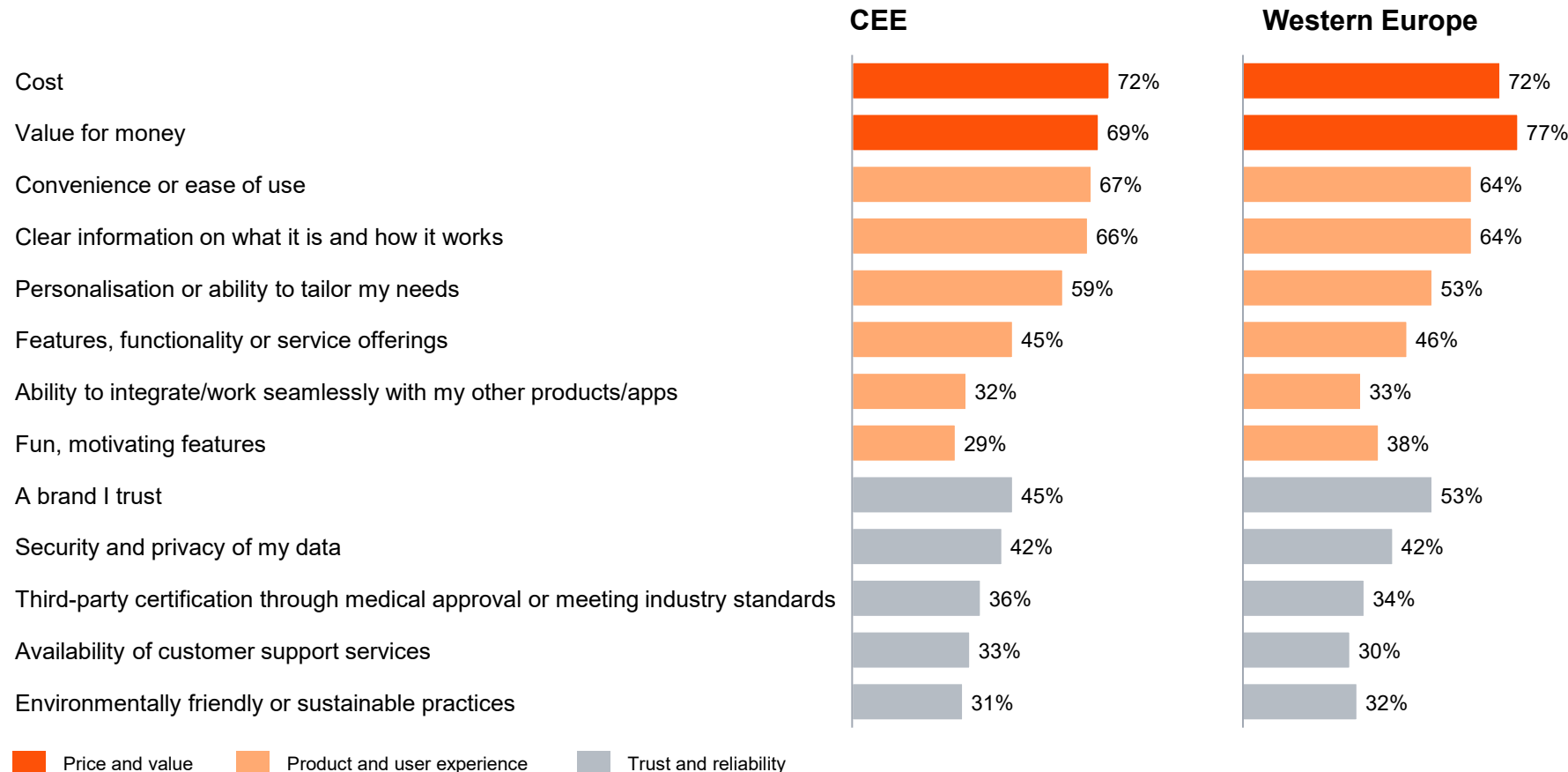
Proportion of respondents interested in each product/service (nutrition, supplements, and personal care products)



Price-related factors are driving lifestyle purchases in both regions. CEE consumers put less emphasis on value for money than in Western Europe

Wellness-related product purchase drivers

When considering whether to purchase a health or wellness product/service to support your goal, which attributes are most important to you?



- ▶ Price is the primary driver of wellness purchasing decisions in both CEE and Western Europe. CEE consumers are less focused on value for money at 69% versus 77% in Western Europe.
- ▶ Product and user experience rank second. Convenience, ease of use and personalisation matter here, and they matter slightly more in CEE than Western Europe.
- ▶ Trust and reliability factors are relatively less important in both regions.
- ▶ For retailers in CEE, the winning formula is balancing affordability with a strong product experience, particularly in terms of convenience, ease of use, and personalisation.

A close-up photograph of a person's wrist wearing a white smartwatch. A hand is shown interacting with the watch's screen. The background is blurred, showing other people in a crowd. A large, bold, orange number '4' is overlaid on the right side of the image.

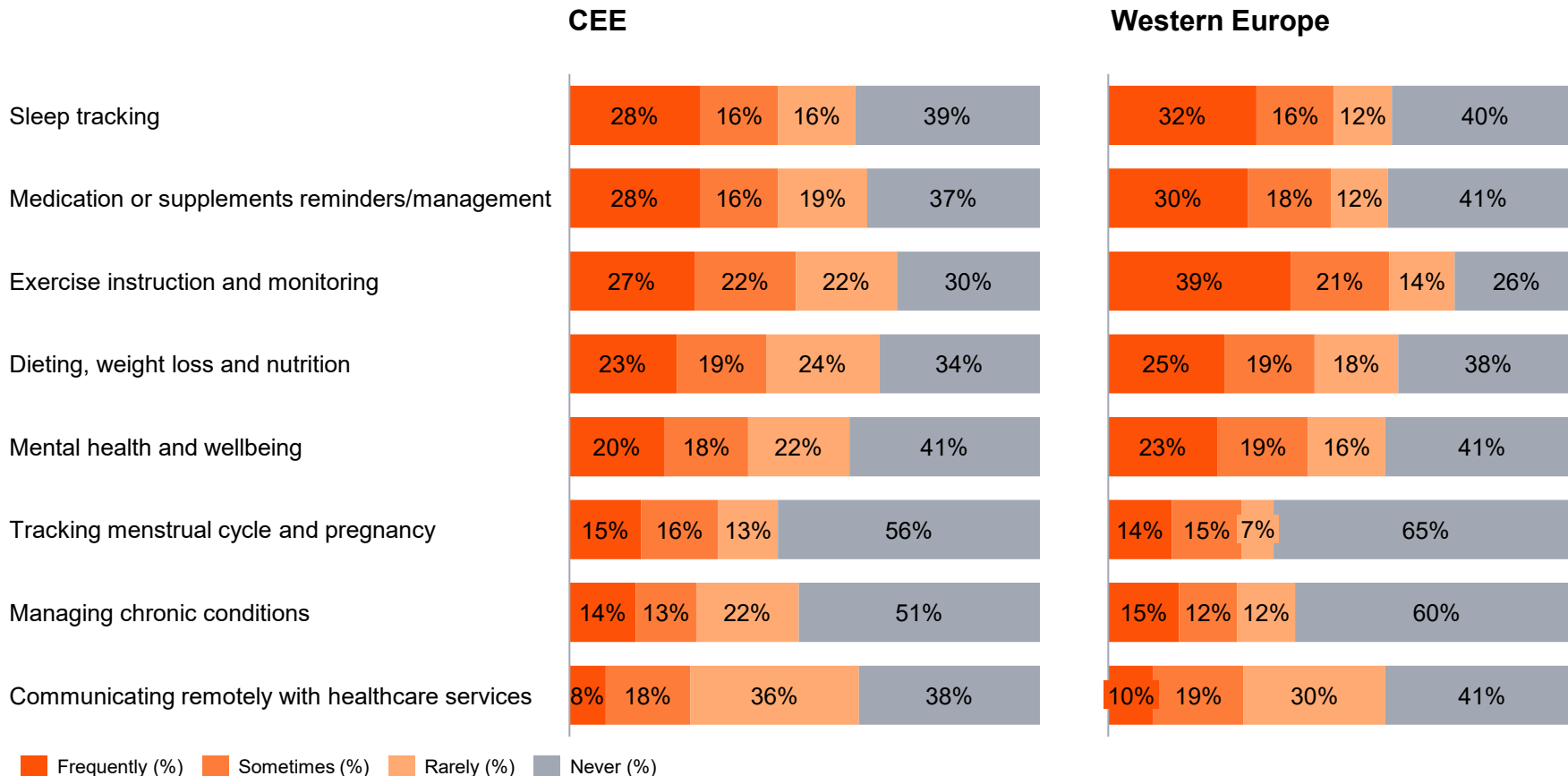
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Wearables, apps,
and AI emerge
as a new competitive area

Tech-enabled health is rising across CEE. Wearables and apps are most often used for fitness tracking, nutrition, weight management, and medication reminders

Wearables and health apps usage

To what extent do you currently use healthcare apps or wearable devices (e.g., fitness trackers or smartwatches) for the following purposes?

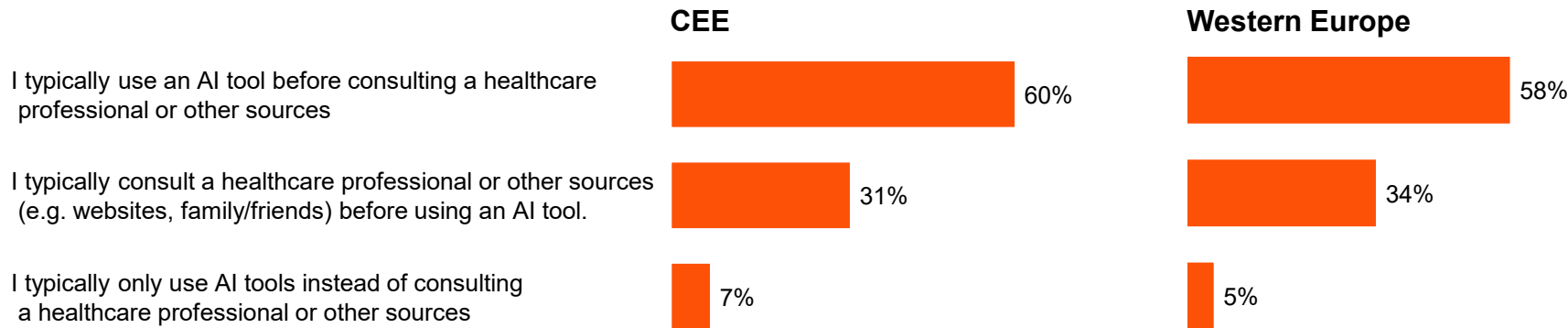


- ▶ Wearables and healthcare apps are becoming more common across CEE, primarily used for sleep tracking (28%), medication and supplement reminders (28%) and exercise monitoring (27%).
- ▶ Western Europe shows a similar pattern but with higher adoption rates. Training-related use cases lead there at 39%.
- ▶ This rising adoption is driving demand for personalised, functional, and performance-oriented products, opening opportunities for digital integration and data-led innovation.

AI is becoming a first stop for health and wellness information, used by 47% of CEE consumers and 36% in Western Europe, often before consulting a healthcare professional

AI use in health and wellness search

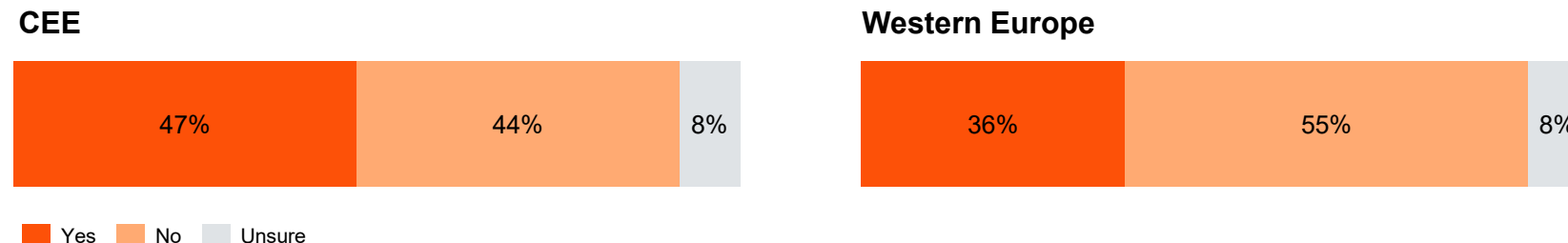
At what point do you typically use AI tools when searching information about a health or wellness question or concern?



- ▶ AI is widely adopted for health and wellness in CEE, with 60% using it for pre-visit health assessments and 47% treating it as their first source of information.
- ▶ Western Europe shows lower adoption, with 58% using AI for pre-visit assessments and 36% as a first information source.
- ▶ AI is emerging as a key decision-making touchpoint in health and wellness. For FMCG players, it means strengthening product credibility, enabling personalisation, and ensuring visibility in AI-driven recommendations.

AI as a primary health and wellness source

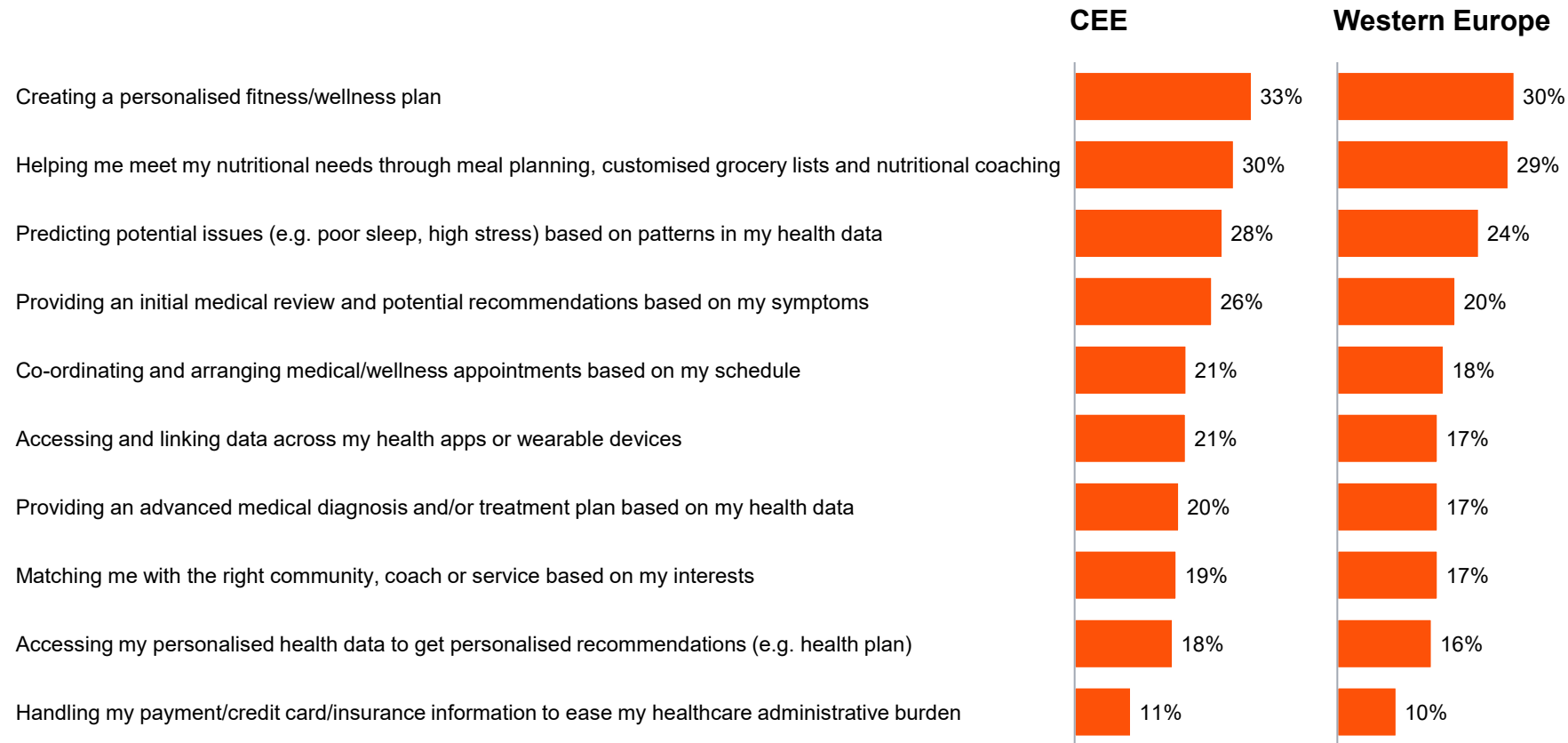
When you first have a health or wellness question or concern, do you use AI tools to find information?



CEE consumers are increasingly using AI for wellness support, primarily for workout plans, nutrition guidance , and initial medical assessments

AI adoption in health and wellness

Which of the following health and wellness tasks, if any, would you be comfortable allowing AI to perform?



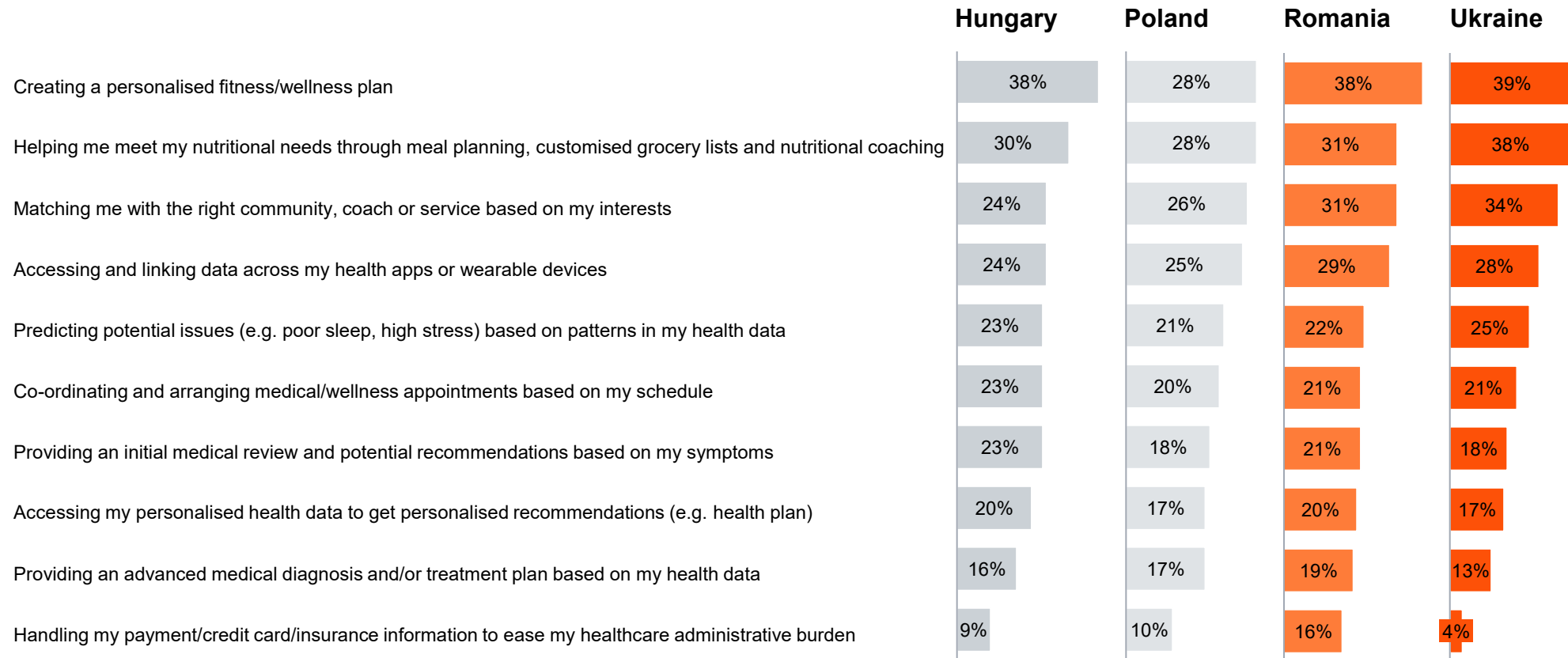
- ▶ In CEE, workout planning (33%) and nutrition planning (30%) are the top areas where consumers use AI for health and wellness support. Data collection and analysis (28%) and initial medical reviews (26%) follow closely.
- ▶ Western Europe shows a similar pattern but with slightly lower adoption across all use cases.

AI usage is consistent across CEE, with over 25% of consumers adopting it for key use cases.

Ukraine leads adoption in the most popular categories

AI adoption in health and wellness

Which of the following health and wellness tasks, if any, would you be comfortable allowing AI to perform?

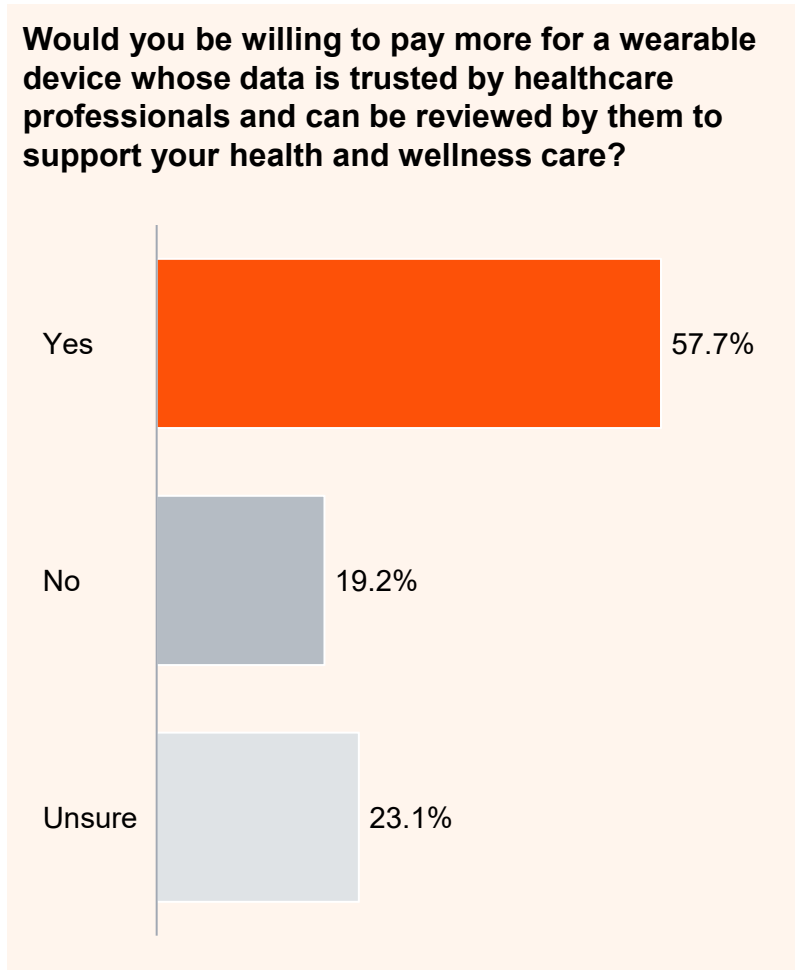
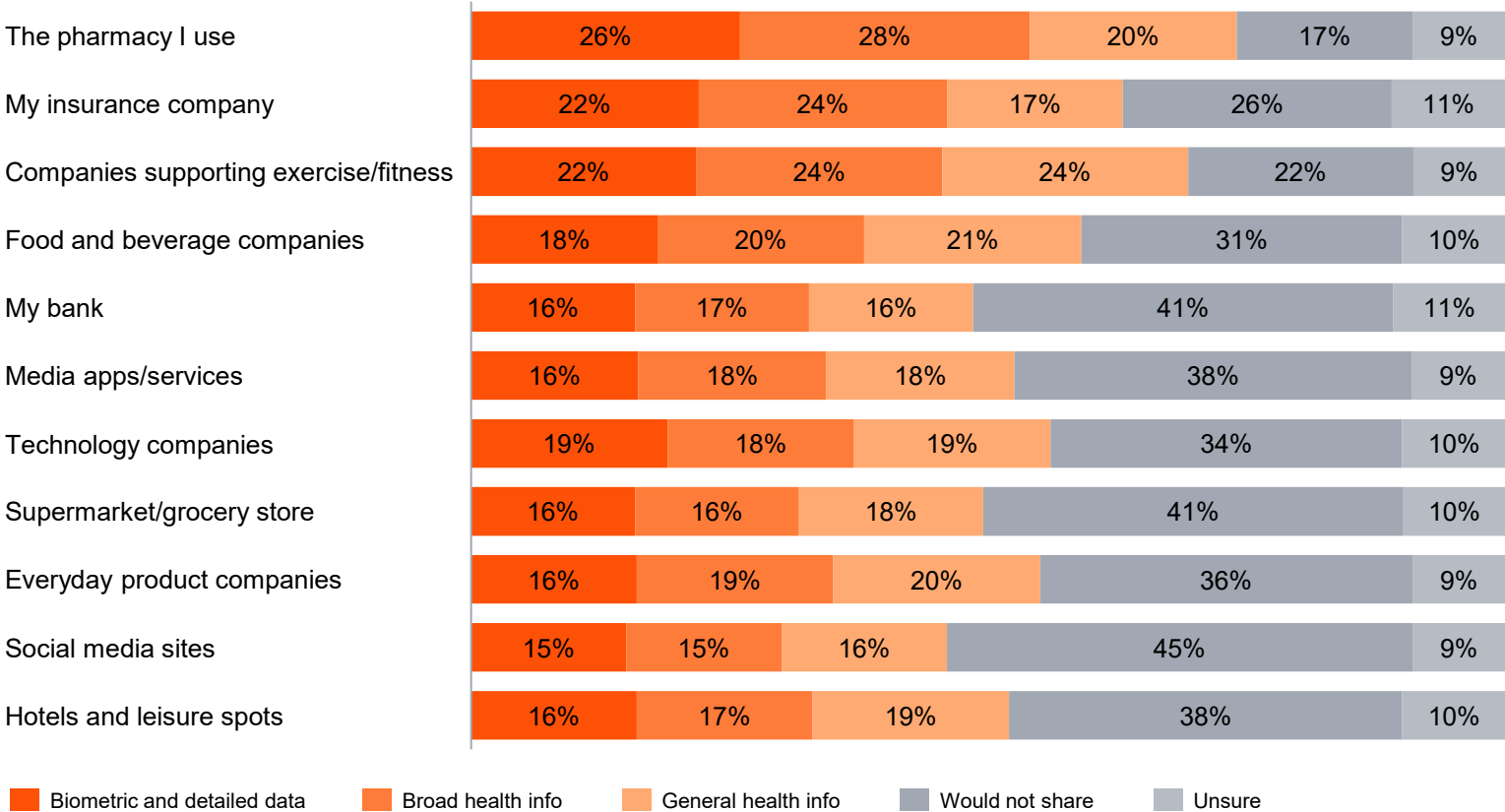


- ▶ AI usage patterns are broadly similar across CEE countries, but Ukraine stands out with the highest adoption rates in top categories.
- ▶ In Ukraine, 39% of consumers use AI for fitness planning, 38% for nutrition, and 34% for matching with the right community or services.
- ▶ Poland shows the lowest adoption across key AI use cases.

Demand for personalisation is driving spend on wearables and trusted-data devices, with consumers more willing to share personal data

Wearables and health apps usage

Please select the level of health data you would be comfortable sharing with the following types of product/service providers, if they were able to use the data to give you more personalised products and services

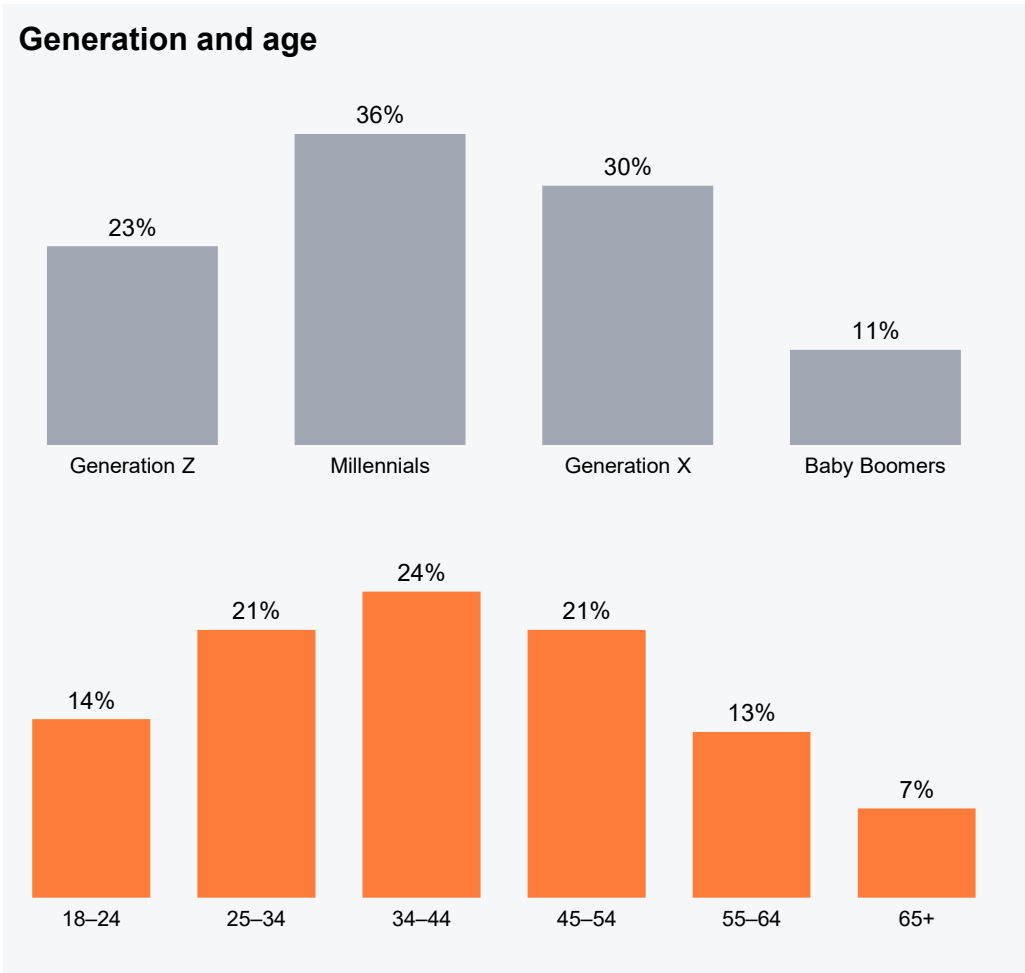
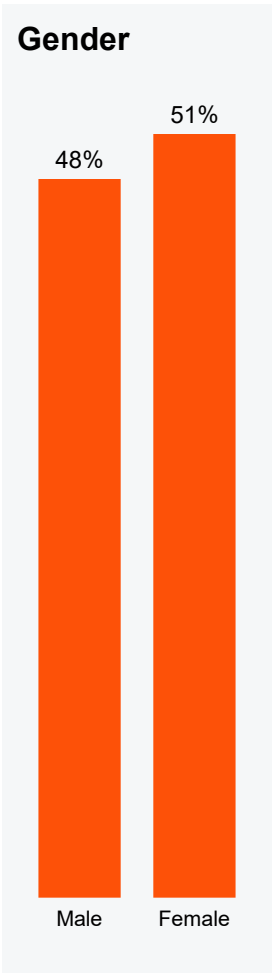




Appendix

All representative samples in the report are statistically significant.
They aim for comprehensive representation across key demographics

Demographics of respondents



Methodology

This report includes the findings for the **2026 PwC Voice of the Consumer Survey, which is focused on supporting the PwC initiative “How We Care”**.

The data for the CEE region is aggregated from findings of four CEE countries in the survey.

We conducted a 15-minute online survey accessing a global sample via a panel provider targeting key demographics within each country (including gender, age, employment status and region).

Data collection took place between February and March 2026, with 21,808 completed responses across 27 countries represented in the global report.

Note: due to rounding, not all reported percentages may equal 100%.



Thank you