


YOUR TRUSTED SOURCE FOR COMPLIANCE AND QUALITY SOLUTIONS IN THE FOOD INDUSTRY



# State of the **FOOD** **TECHNOLOGY** **STACK** 2026 Survey Report

**Trustwell** 

**Trustwell** 



## From the Desk of Our VP **Lydia Adams**

At Trustwell, we have the privilege of working with companies from all over the food industry, from family-owned fast-casual favorites to the global wholesale distributors that keep the world fed. They're united by a shared challenge: managing complexity while striving for safety, quality, and transparency.

Our *2026 State of the Food Technology Stack Survey* provided an opportunity to hear directly from the people tackling these challenges every day. More than 300 professionals across manufacturing, retail, supply, and food service shared how they use technology, and where they want it to go next.

The findings in this report show what many of us already know:

Technology  
is everywhere,  
but it  
**DOESN'T**  
always work  
together.

The biggest challenge, and the biggest opportunity, is **INTEGRATION. It's the top pain point, the top barrier to adoption, and the most wished-for improvement.** Companies want connected systems that reduce manual work and unlock real value.

At Trustwell, addressing these gaps means giving food companies the tools to protect their consumers, strengthen their supply chains, and build trust with every product they bring to market. Thank you for taking the time to explore this year's survey. I hope you find it both informative and inspiring as you chart the path forward for your own organization.

Together in Traceability,

*Lydia Adams*

Lydia Adams  
VP of Marketing, Trustwell

# State of the **FOOD TECHNOLOGY STACK**

2026 Survey Report

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**Trustwell's 2026 State of the Food Technology Stack Survey captured insights from more than 300 professionals across the food industry, including manufacturers, retailers, suppliers, and service providers.**

The findings reveal a technology landscape in transition: companies are actively seeking to modernize their operations by replacing outdated manual processes and fragmented data with comprehensive, integrated solutions that reduce friction and put data-informed strategy front and center.



**Average Solutions in the Stack:**

Organizations are managing an average of 3.5 different solutions in their food tech stack, with some (5.3%) juggling as many as 11.



**Top Technology Type:**

Spreadsheets remain prevalent across the board, but their dominance is strongest in the smallest companies (11-50 employees / 73.1%), while larger organizations are steadily moving toward Purpose-built Software (5,000+ employees / 62.8%).





# The picture that emerges is one of **FRAGMENTATION.**

The number one challenge with current systems is lack of integration, cited by 22.7% of respondents. It is also the top barrier to adopting new technologies: more than a third of respondents (34.6%) selected it as a barrier, and nearly one in four (22.1%) ranked it as their top barrier. When asked what improvement would have the biggest impact if added to current solutions, nearly a third of respondents pointed to better cross-system integration.

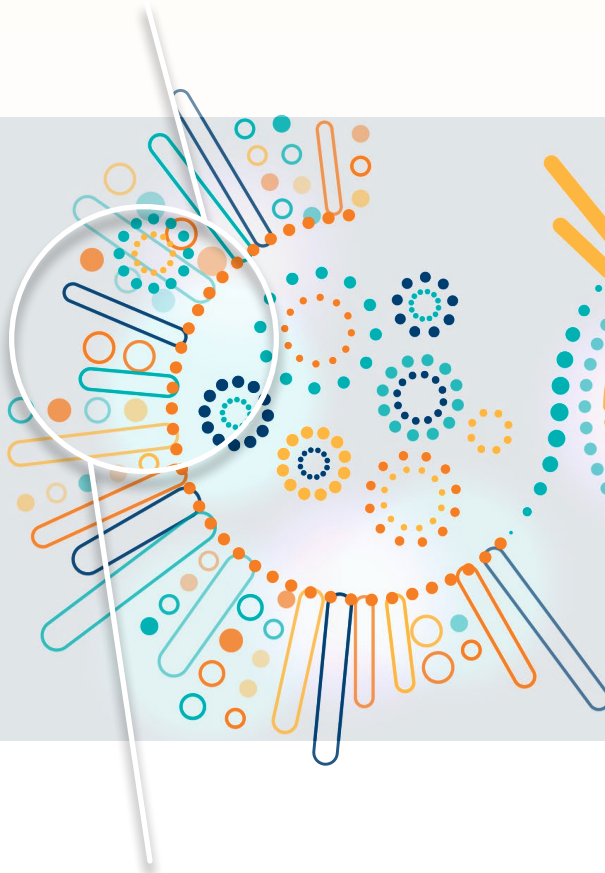
**TOP CHALLENGE WITH CURRENT TECHNOLOGY**

Lack of Integration  
**22.7%**

**MOST WISHED FOR IMPROVEMENT**

Cross-system integration  
**29.5%**

fragmentation



cross-system integration



**TOP BARRIER TO ADOPTING NEW TECHNOLOGIES**

Lack of Integration  
**34.6%**

**TOP INVESTMENT PRIORITY**

Automating Manual Processes  
**21.3%**

Across roles, respondents prioritize efficiency and visibility. Investment priorities over the next 12 to 24 months include automating manual processes, reducing operational costs (18.6%), and improving data analytics and reporting (13.3%).



Taken together, the survey highlights both **the progress** the industry has made in adopting **DIGITAL TOOLS & the opportunities** that remain for greater **INTEGRATION & MATURITY.**



# INSIGHTS from Across the Food Chain

## 306

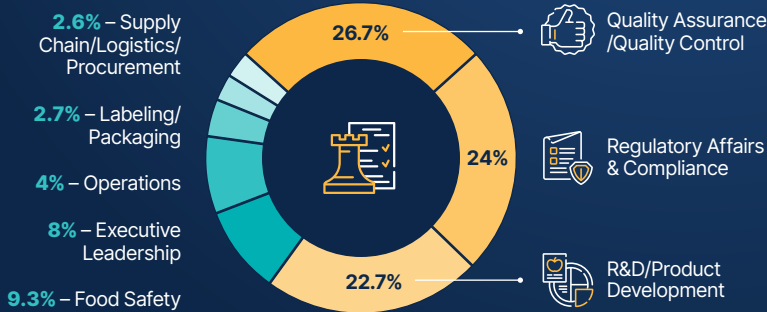
TOTAL RESPONDENTS



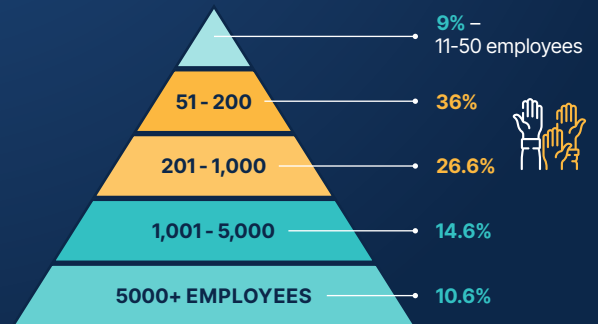
### Company Functions Represented



### Primary Roles



### Organization Size



A total of **306 professionals** responded to the 2026 State of the Food Technology Stack Survey. **Most respondents represent Food Manufacturing and Processing Companies, which made up over 70% of the sample.**

Roles were diverse, but three functions dominated the response pool. **Quality Assurance and Quality Control accounted for 26.7% of respondents, Regulatory Affairs and Compliance for 24%, and Research and Development for 22.7%.** Food Safety Specialists (9.3%) and executive leaders (8%) were also well represented.

Survey participants spanned a range of company sizes. **The largest segment, 36%, came from organizations with 51 to 200 employees, while 26.6% represented companies with 201 to 1,000 employees.**

Larger enterprises were also represented, with 14.6% coming from companies with 1,001 to 5,000 employees and 10.6% from organizations with more than 5,000 employees. Smaller companies, with 11 to 50 employees, made up 9% of respondents.

# The CURRENT STATE of the Stack



fragmentation

The data confirms that fragmentation remains the norm in food technology. On average, companies reported using 3.5 solutions to manage their operations, with a median of four.

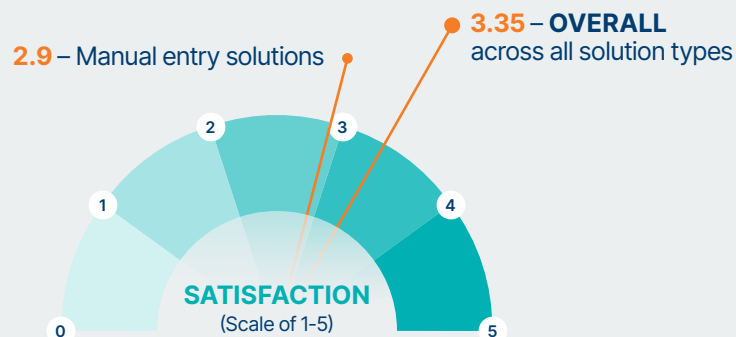
**The most common number of solutions was three, reported by 16% of respondents,** but some companies use as few as one (9.3%) and others as many as 11 (5.3%).

Spreadsheets remain the backbone (and bane) of many organizations. Nearly 40% of respondents rely on spreadsheets such as Excel or Google Sheets as part of their core solution set.



This reliance is strongest in smaller organizations, particularly those with 11 to 50 employees, where more than **70% reported spreadsheets as their primary tool.**

In contrast, enterprises with more than 5,000 employees are far more likely to adopt purpose-built software, with 62.8% relying on these tools compared with just 19.2% still leaning on spreadsheets. Just because manual-entry solutions are relatively standard, doesn't mean they're up to snuff, however. The average satisfaction level for the old standby was **2.9 / 5**, putting it well below the overall average level of satisfaction across all solution types of **3.35 / 5**.

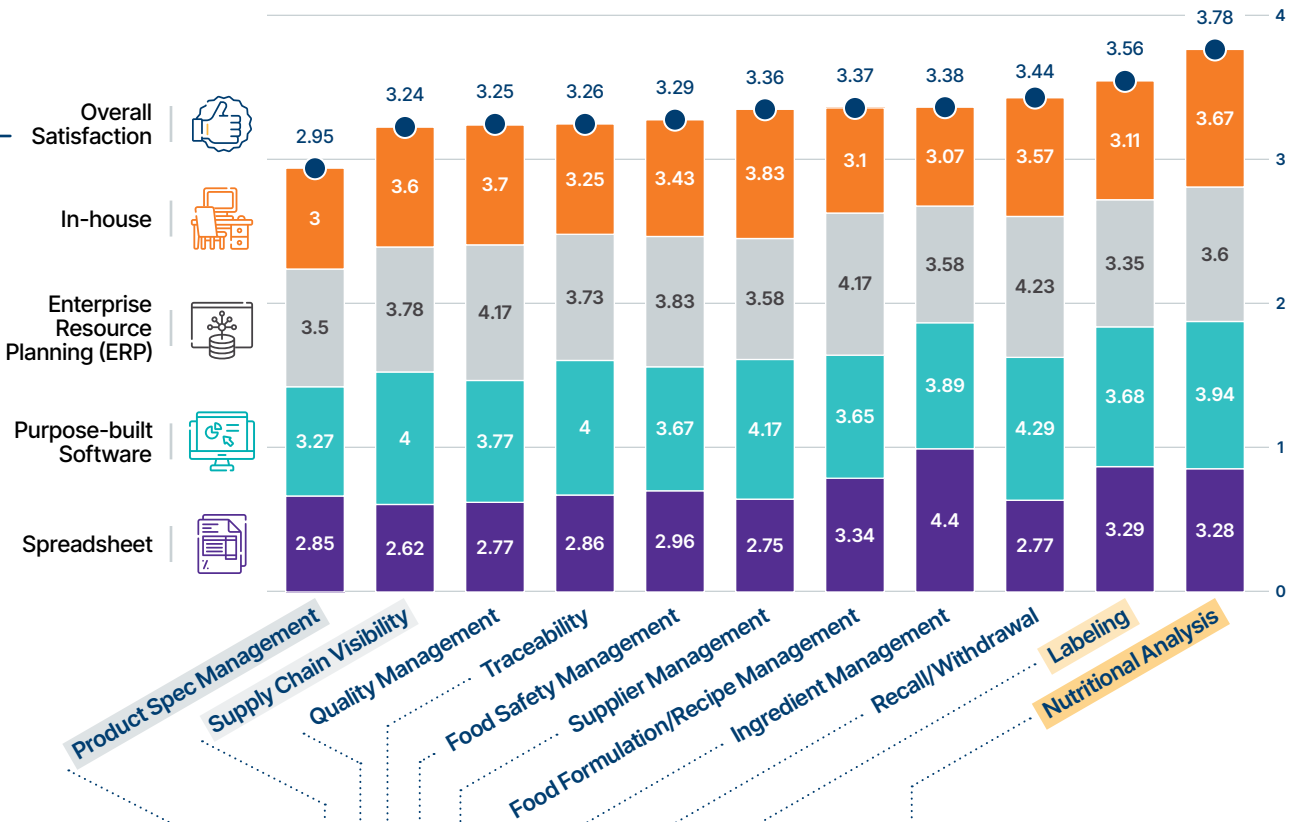




In fact, when segmented by Solution Area, the satisfaction gap between spreadsheets and other technologies persisted or grew wider:

5

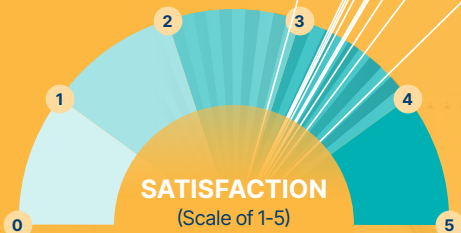
### SATISFACTION Across Solutions



**OVERALL** satisfaction levels reveal a divide:

Product Spec Management and Supply Chain Visibility rank at the bottom.

Labeling and Nutritional Analysis received the highest scores from our respondents.





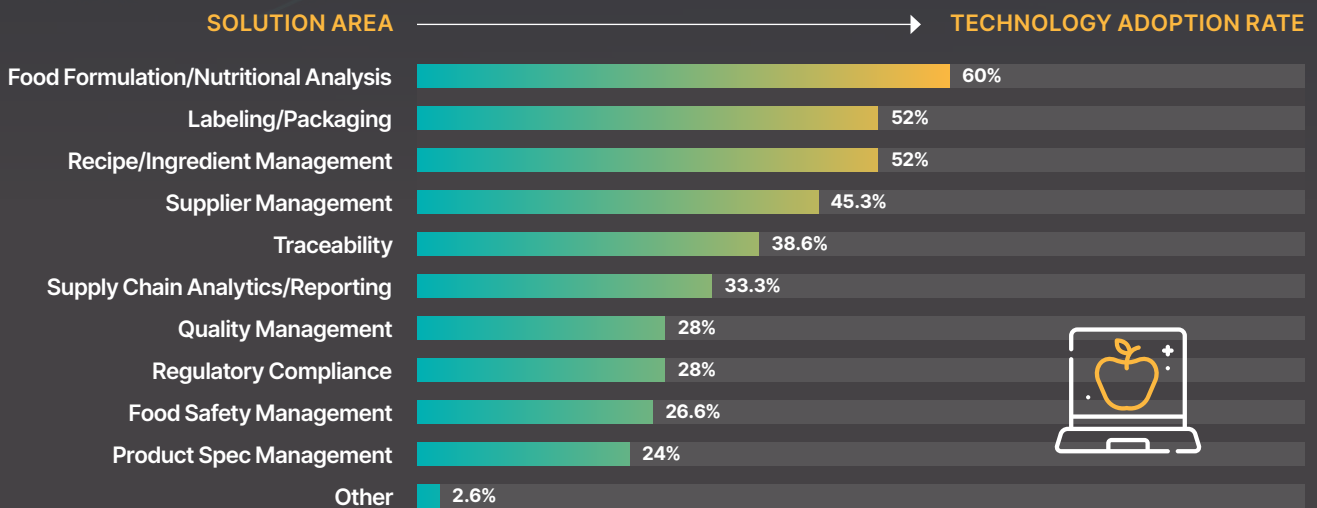
# Today's Food Technology HOTSPOTS



When asked about specific areas of technology adoption, respondents reported modest uptake of dedicated solutions across functional categories.

**Food Formulation/Nutritional Analysis leads with 60% adoption, followed closely by both Labeling/Packaging and Recipe/Ingredient Management at 52%.**

Traceability, despite its importance in both compliance and risk management, is middle-of-the-pack at 38.6%, while only about a quarter of responding food companies said they used dedicated Food Safety Management (26.6%) or Product Spec Management (24%) technology solutions.



## ADOPTION + SATISFACTION





# Too Many Tools, TOO FEW CONNECTIONS



The supply chain software landscape remains fragmented, with multiple tools used at nearly every stage.

Respondents reported using over 48 unique tools across the food supply chain. **Only 8% of these tools support end-to-end interoperability.** More than half (52%) are point solutions with no integration capabilities.



# SCALING UP the Stack

inconsistencies

## How **Company Size** Shapes Tech Choices

The survey findings reveal a clear maturity gradient from small to large organizations. Smaller companies rely most heavily on spreadsheets with overall low satisfaction, yet report relatively strong satisfaction in narrow areas, indicating that these solutions are often well-suited to smaller-scale operations with limited complexity.

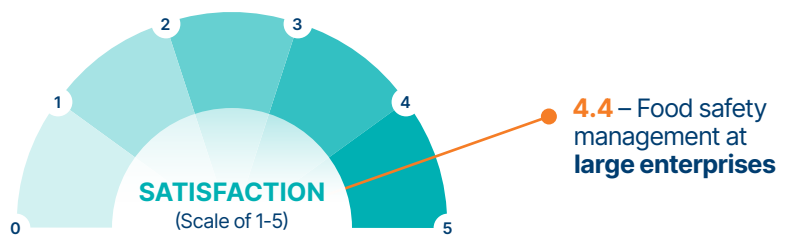
Mid-sized organizations, those with 51 to 1,000 employees, occupy a middle ground. Their technology use is more diverse, with spreadsheets, purpose-built software, and ERP modules in use at similar levels.

However, satisfaction is inconsistent. While some areas, such as labeling and nutritional analysis, score positively, others show weakness, particularly ESG reporting and product specification management.



This inconsistency suggests that mid-market companies are **struggling to scale their technology** without the resources of larger enterprises.

At the other end of the spectrum, large enterprises demonstrate both higher adoption of advanced solutions and higher satisfaction. Companies with more than 5,000 employees report the highest satisfaction in Food Safety Management, with a score of 4.40. They also report strong satisfaction in Supply Chain Visibility and Recall Management, functions where smaller and mid-sized organizations struggle. **This pattern indicates that investment in advanced systems not only increases adoption but also improves outcomes.**





# SATISFACTION

## by Organization Size & Solution Types



Product Spec Mgmt.    Supply Chain Visibility    Quality Mgmt.    Traceability    Food Safety Mgmt.    Supplier Mgmt.    Food Formulation/Recipe Mgmt.    Ingredient Mgmt.    Recall/Withdrawal    Labeling    Nutritional Analysis

Organization Size	Solution Type	Product Spec Mgmt.	Supply Chain Visibility	Quality Mgmt.	Traceability	Food Safety Mgmt.	Supplier Mgmt.	Food Formulation/Recipe Mgmt.	Ingredient Mgmt.	Recall/Withdrawal	Labeling	Nutritional Analysis
11-50 EMPLOYEES	OVERALL	3.6	3.6	3.8	3.4	3.6	4.2	3.86	4	3.25	3.21	3.5
	In-house	n/a	n/a	4	n/a	n/a	n/a	n/a	n/a	n/a	3.25	3
	ERP	n/a	n/a	n/a	3	n/a	n/a	n/a	4	n/a	n/a	4
	Standalone	n/a	4	n/a	3	4	5	n/a	n/a	n/a	3	n/a
	Spreadsheet	3.6	3.5	3.75	3.67	3.5	4	3.86	4	3.25	3.25	3.5
51-200 EMPLOYEES	OVERALL	2.91	3.11	3.14	3.48	3.14	3.14	3.56	3.5	3.5	3.57	4
	In-house	3.4	3.33	3.75	3.6	3	3.33	3.2	3	3.75	3.5	4
	ERP	4	3.71	4	3.69	4	3.6	4	3.89	4.44	4	5
	Standalone	2	n/a	3	2	3	4	3.3	2	3	3.42	3.93
	Spreadsheet	2.73	2.56	2.86	3	3	2.73	4	3.63	2.38	3.75	4
201-1,000 EMPLOYEES	OVERALL	2.68	3.13	3.03	3.31	3	3.39	3	3.18	3.07	3.44	3.53
	In-house	2.5	3	2.67	1.5	3	3	2.5	2.25	2	2.5	n/a
	ERP	4	4	4.5	4.14	3.5	3	3.25	3.83	4	3	3.5
	Standalone	2.86	4.25	3.75	4	3	4.57	3.2	4.33	3.5	3.75	3.67
	Spreadsheet	2.36	1.67	2.44	2.6	2.88	2.5	2.83	2.25	2.9	3	2.5
1,000-5,000 EMPLOYEES	OVERALL	3.33	3.71	3.6	2.5	3.6	3.57	3.29	3.29	4	3.44	3.94
	In-house	n/a	n/a	5	n/a	4	5	n/a	3	5	2.75	n/a
	ERP	4	3.6	4	4	4	3.67	2	3.67	4	4	n/a
	Standalone	3.5	n/a	4	1	5	3	4.33	4	n/a	3.67	4.33
	Spreadsheet	3	4	2.5	1	2.5	3	2.67	2.5	3.5	3	2.75
5,000+ EMPLOYEES	OVERALL	3.8	3.6	3.8	3.25	5	4	4.2	4	4.5	4	4.33
	In-house	4	n/a	n/a	n/a	n/a	n/a	4	4	3	n/a	4
	ERP	n/a	3.5	4	4	n/a	4	n/a	n/a	n/a	n/a	n/a
	Standalone	3.75	3.67	3.75	3	5	4	4.33	4	5	4	4.4
	Spreadsheet	n/a	n/a	n/a	n/a	n/a	n/a	4	n/a	n/a	n/a	n/a



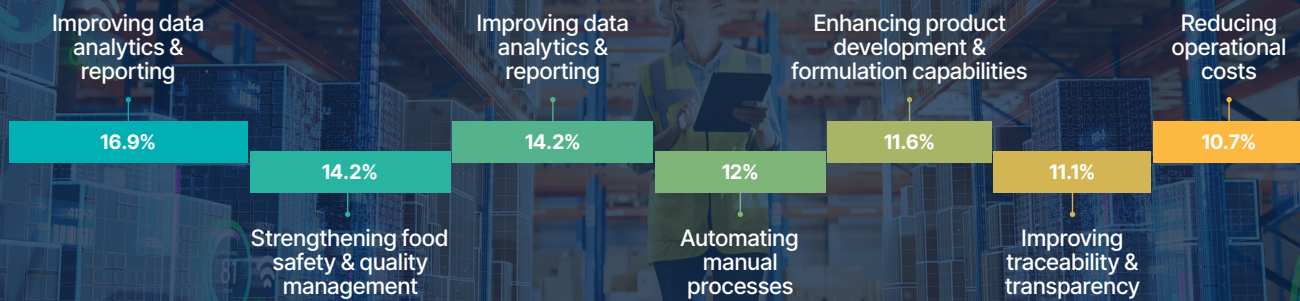
# Where Companies are INVESTING NEXT

When asked where they plan to focus technology investments over the next 12 to 24 months, respondents consistently pointed to improvements that deliver better visibility, stronger safety, and greater efficiency.

**Improving Data Analytics and Reporting leads the list of investment priorities, with 16.9% of respondents identifying it as their top priority.** Companies recognize that stronger reporting not only supports compliance but also empowers teams to make faster, more informed decisions.



## Q. What are your organization's top five priorities for investment in food technology over the next 12-24 months?



Close behind are Strengthening Food Safety and Quality Management and improving supply chain visibility and efficiency (14.2%). Together, these reflect a commitment to both consumer protection and operational resilience.

Automation continues to be a top priority across the industry, with 12% of respondents citing the **need to reduce manual processes that consume valuable time and resources.** Enhancing product development and

formulation capabilities (11.6%) and improving traceability and transparency (11.1%) also rank high, showing that innovation and risk management remain front of mind.

While efficiency is still important, the data suggests that companies are increasingly prioritizing capabilities that strengthen the supply chain, safeguard consumers, and support smarter decision-making.



**TOP 5 PRIORITIES**  
by Role



Automating manual processes



Enhancing product development & formulation capabilities



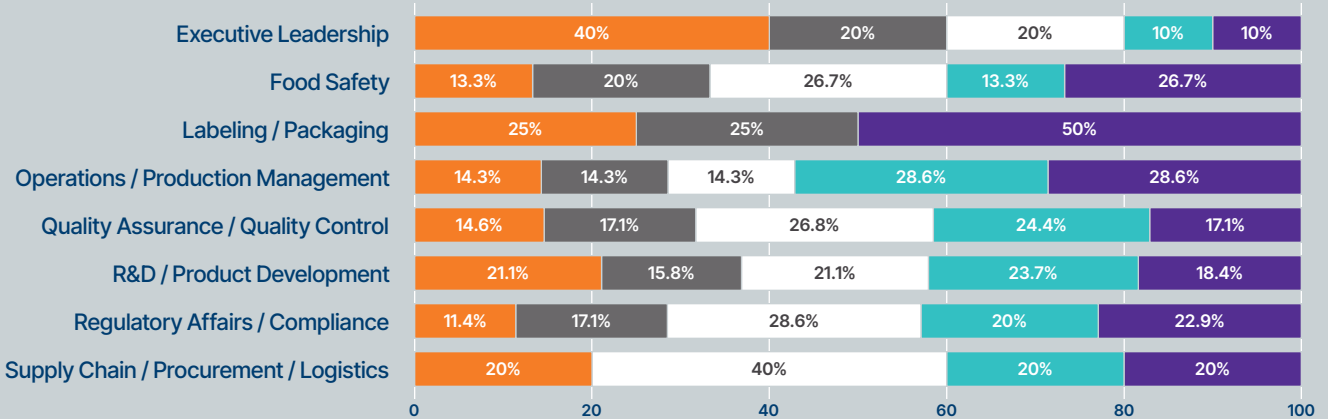
Improving data analytics & reporting



Improving supply chain visibility & efficiency



Strengthening food safety & quality management



**Breaking these priorities down by role provides further nuance.**

Quality Assurance and Regulatory professionals both placed heavy emphasis on data analytics and reporting, alongside cost reduction and automation. R&D professionals showed a distinct focus on improving supply chain visibility and efficiency, while executives leaned most heavily on automating manual processes and reducing costs. Food Safety professionals expressed balanced interest across all categories, while supply chain managers prioritized visibility and traceability.

This role-specific segmentation underscores that while the industry shares common goals, the path forward varies depending on responsibilities.

For executives, efficiency is the lens. For compliance and quality professionals, accuracy and integration take precedence. For R&D, the focus is on visibility and agility in product development.





# The Innovation GAP

Even as companies identify their investment priorities, the solutions they most desire remain out of reach.



**Better cross-system integration** is the single most requested capability, with **22.3%** of respondents identifying it as critical.

Centralized platforms and automated regulatory compliance updates follow closely, at **14.6%** and **14.1%** respectively. Other areas of interest include more intuitive interfaces, enhanced supplier auditing tools, and predictive analytics.

## INSIDE the Stack

*These quotes highlight real-world experiences of professionals working across the food industry.*

*"AI scanning and integration capabilities for SOPs, R&D notes, and ingredient specifications."*

– Principal Regulatory Scientist

*"[Not] having to remember to manually document quality or compliance tasks."*

– Quality Control Manager

*"More AI or automation for manual tasks, easier access to data to allow for ease of reporting, more configurations to provide us more autonomy in our set up."*

– Director, Supply Chain & Business Operations Compliance

*"A centralized platform with better integration across systems, real-time data visibility, and predictive analytics would significantly improve our operations. Current tools are fragmented, making it hard to track performance, automate tasks, and scale efficiently."*

– CEO & Founder

*"AI Assisted formulation support."*

– R&D Lab Supervisor

**Q.**

What features or capabilities are **missing** from your current solutions that would significantly improve your operations?



Across the industry, food companies want technology that does more than simply replace manual processes; they want solutions that connect, automate, and predict.

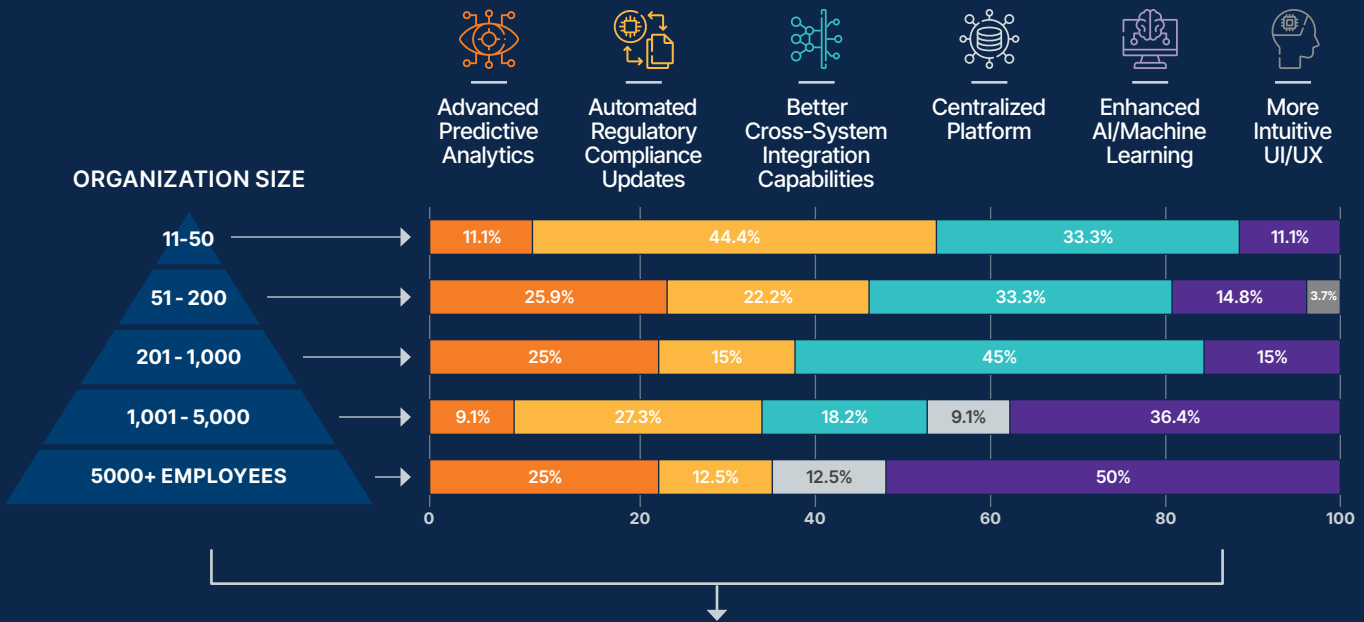
Better cross-system integration, centralized platforms, and automated compliance updates continue to top the overall wish list. But when you look at company size, clear differences emerge.

**Smaller organizations** are focused on automation and compliance. For those with 11-50 employees, nearly half (44.4%) rank automated regulatory compliance updates as their most desired functionality, with cross-system integration also high on the list. These companies want tools that reduce risk and simplify operations without requiring large IT investments.

**Mid-sized organizations**, in the 51-1,000 employee range, consistently point to integration as their most urgent need. For example, 45% of companies with 201-1,000 employees identified cross-system integration as their top priority. Predictive analytics also rises in importance here, as mid-market companies look for insights that help them scale efficiently.

**Larger enterprises**, on the other hand, are turning their attention to advanced capabilities. Companies with 1,001-5,000 employees prioritize enhanced AI and machine learning (36.4%), while half of organizations with more than 5,000 employees say AI is their top priority. These companies have already invested in foundational systems and are looking for tools that can deliver strategic, forward-looking intelligence across the supply chain.

## Q. Which 3 functionalities or types of solutions would significantly improve your organization's operations in the next 1-3 years?



This segmentation shows that the innovation gap is not uniform.



**Small companies** are looking for compliance & integration.



**Mid-sized organizations** want connectivity & analytics.



**Large enterprises** are leaning into AI & machine learning.



# smarter, more connected



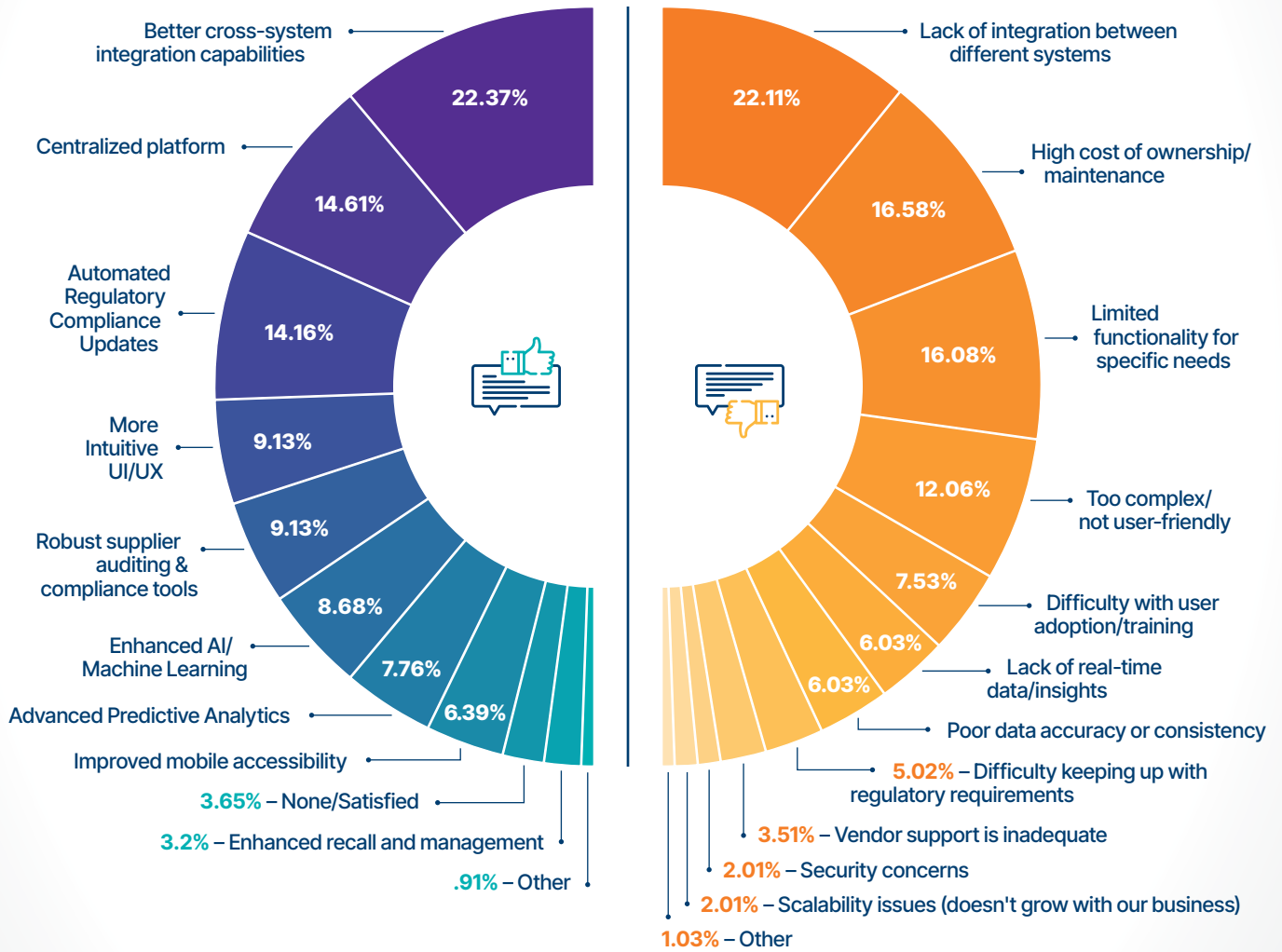
The path forward may differ,  
but the end goal is the same:  
**smarter, more connected**  
systems that make the  
food industry **SAFER &**  
**MORE RESILIENT.**



# BARRIERS stand in the way of these advancements.

Budget constraints are the most commonly cited obstacle, reported by nearly one in four respondents. Integration difficulties ranked second at 17.6%, while lack of internal expertise and resistance to change followed. These findings suggest that while organizations are eager to move forward, they struggle with both financial and cultural hurdles.

## DESIRED Functionalities VS. BARRIERS To Adoption



# EAGER TO MOVE FORWARD



# STRATEGIC IMPLICATIONS for Industry Leaders

Our 2026 State of the Food Technology Stack Survey results confirm that **technology adoption in the food industry is advancing**, albeit unevenly.



## Larger organizations demonstrate the clearest proof of return on investment.



They not only adopt more advanced systems, but they also report higher satisfaction across critical functions like food safety management, recall, and supply chain visibility. Their experiences show that integrated platforms and automation deliver measurable gains in efficiency, accuracy, and resilience.



## Mid-sized organizations face the steepest challenges.



They are often too complex to rely on spreadsheets alone but may not yet have the resources to invest in robust, enterprise-level systems. This creates gaps in integration, functionality, and satisfaction, particularly in areas like Product Specification Management and Supply Chain Visibility.



## Smaller organizations, meanwhile, remain heavily reliant on manual solutions.



Unsurprisingly, their priorities are practical: compliance automation, cross-system integration, and reducing manual work. Technology strategies for this segment need to be lightweight, cost-effective, and easy to implement, while still laying a foundation for future growth.



# INSIDE the Stack

**"[Having a] strong internal 'champion.'"**

– Director of Operations

**"Strong support from  
[our] tech provider."**

*These quotes highlight real-world experiences  
of professionals working across the food industry.*



**Q.**  
Thinking about your current technology provider, what do you believe were the **key factors** that contributed to its successful implementation & adoption?

**"Training sessions during implementation."** – Quality Control Manager

**"Meeting specific needs for the business. Cost approachable. The promise of an easy implementation. Customer service."**

– Director, Quality Assurance, Commercialization & Food Safety

**"The key factors included strong leadership support from our executive team, comprehensive user training that helped staff adapt to the new system, and excellent technical support from [vendor name]. The phased rollout approach allowed us to address issues early, and the system's intuitive interface made adoption smoother than expected."** – CEO & Founder

Notably, integration emerged as the industry's defining challenge and biggest opportunity. It is the top pain point, the top barrier to adoption, and the most wished-for improvement. For executives, the message is clear: disconnected systems not only slow down operations but also undermine trust and transparency. Closing these gaps will create competitive advantage far beyond regulatory compliance.

**The implication for industry leaders is simple but urgent.** Technology investments should not be viewed through a one-dimensional lens, whether it's compliance or cost savings.

**Integrated, automated solutions are becoming the backbone of resilience in the food supply chain.**



#### ENTERPRISES

Proving ROI through integration and AI

#### SMALL ORGANIZATIONS

Seeking practical, lightweight solutions that scale

#### MID-MARKET

Facing the greatest pain points, high potential for gains

Companies that **ACT NOW** will set the standard for safety, transparency, and efficiency in the years ahead.

# Connect the Dots with **TRUSTWELL**

By uniting formulation, labeling, supplier management, food safety, and traceability into one connected platform, Trustwell helps companies move beyond spreadsheets and point solutions.

As the only full food supply chain solution, from recipe to recall, our Trustwell Connect platform allows our customers to formulate, label, track and recall products across an increasingly complex supply chain. With more than three decades of expertise, our people form the foundation of a true, all-in-one solution.

Digital transformation is not a one-time project. It's a journey, and whether you are replacing spreadsheets, bridging systems, or investing in advanced analytics, the goal is the same: a safer, smarter, and more transparent food system. Trustwell is proud to be part of that journey, alongside the hundreds of professionals who contributed to this report.

**Together, we are shaping the future of food technology** — one that is more resilient, transparent, and trusted than ever before.

The only full food supply chain solution,  
**FROM RECIPE TO RECALL.**



See how Trustwell  
connects formulation,  
labeling, supplier  
management,  
and food safety  
**IN ONE PLATFORM.**


Your Next Step **STARTS HERE**

Your trusted source  
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