European Commission



SPECIAL EUROBAROMETER **578**

Food Innovation: Building Public Trust and Outreach

EUROBAROMETER **REPORT**

MAY – JUNE 2026

FACE TO FACE EUROBAROMETER

This survey has been requested by the European Commission, Directorate-General for Research and Innovation (DG RTD) and co-ordinated by the European Commission, Directorate-General for Communication (DG COMM 'Public Opinion & Citizens Engagement' Unit)

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This document does not represent the point of view of the European Commission. The interpretations and opinions contained in it are solely those of the authors.

Project title

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Food Innovation: Building Public Trust and Outreach

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Introduction

Introduction

Europe's food systems are facing a growing range of challenges. Climate change, biodiversity loss, pressure on natural resources, changing consumer expectations, global supply chain disruptions and the need to ensure long-term food security are increasingly shaping discussions about the future of food systems. At the same time, the European Union is seeking to strengthen the sustainability, resilience and competitiveness of its agri-food sector while continuing to ensure high standards of food safety and consumer protection.

In this context, food innovation is receiving growing attention from policymakers, researchers, farmers, food producers and consumers. New technologies and production methods are being developed to help address challenges such as climate change, resource scarcity, pests and plant diseases, while supporting sustainable food production and expanding consumer choice. Food innovation may also contribute to broader European objectives related to food security, environmental sustainability, economic growth and scientific leadership.

Several recent EU policy initiatives have highlighted the importance of innovation within food systems. In the past, the **European Green Deal**[1] and the **Farm to Fork Strategy**[2] identified research and innovation as important tools for supporting the transition towards more sustainable food systems. In addition, the EU's research and innovation framework programmes, including **Horizon Europe**[3] and the **Food 2030**[4] R&I policy framework, have supported R&I activities on new food technologies, sustainable ingredients and protein sources, biotechnology, precision fermentation, and resource-efficient food production. More recently, discussions related to EU's strategic autonomy, food security and resilience have further underlined the importance of developing new tools and technologies capable of strengthening Europe's capacity to respond to future challenges and crises.

For the purposes of this survey, *innovative foods* refer to foods or food ingredients developed using advanced technologies that may offer additional options alongside existing food systems and European culinary traditions. These include, for example, ingredients produced through fermentation using micro-organisms, foods developed from crops adapted to better withstand droughts, pests or extreme weather, plant-based protein ingredients obtained using new methodologies, products derived from animal parts or cells, and other novel approaches to food production[5]. Such products may differ in how they are produced, regulated, labelled and perceived by consumers. This definition was read to all respondents at the start of the survey.

As many innovative food products remain relatively new to consumers, public perceptions and levels of acceptance are likely to play an important role in shaping their future development. Questions related to safety, transparency, trust, environmental impact, affordability and the preservation of culinary traditions are increasingly part of the public debate surrounding food innovation.

This Special Eurobarometer explores Europeans' awareness, perceptions and attitudes towards innovative foods. The findings are based on interviews with 26456 respondents from different social and demographic groups, conducted in 27 Member States, in the appropriate national language. It examines how informed citizens feel about the topic and the extent to which they had heard, read or seen information about innovative foods prior to the survey. It also analyses overall attitudes towards food innovation and comfort levels with different types of innovative food products.

The report further investigates the concerns and opportunities Europeans associate with innovative foods. It explores citizens' views regarding potential health impacts, perception of how natural it is, trust, transparency and implications for farmers and traditional food production, alongside perceived benefits such as food security, environmental sustainability, improved nutrition, innovation and economic opportunities.

A particular focus of the report is the role of trust in shaping public acceptance. The survey examines the conditions under which Europeans may be willing to try or purchase innovative foods, including the role of labelling, safety assessments, information provision and pricing. The report also analyses which institutions and information sources citizens trust most when seeking information about the safety and environmental impact of innovative foods.

This report therefore provides a comprehensive overview of how Europeans perceive food innovation at a time when innovation is increasingly contributing to a resilient, sustainable and competitive European food system.

[1] The European Green Deal - European Commission
[2] Farm to Fork strategy | EU Agri-food Platform
[3] Horizon Europe - Research and innovation - European Commission, Cluster 6: Food, Bioeconomy, Natural Resources, Agriculture and Environment - Research and innovation
[4] Food 2030 - Research and innovation - European Commission
[5] The technologies shown are illustrative and not exhaustive. The study focused on innovative foods as a broad concept rather than on individual products or technologies.

Methodology

This Special Eurobarometer 578 on Food Innovation was part of the Eurobarometer wave 105.4 and was conducted between 22 May and 24 June 2026. Some 26456 respondents from different social and demographic groups were interviewed in the appropriate national language. This survey was commissioned by the European Commission, Directorate-General for Research and Innovation (DG RTD).

The methodology used is that of the Special Eurobarometer surveys carried out by the Directorate-General for Communication ('Public Opinion and Citizens Engagement' Unit)[6,7]. A technical note concerning the interviews conducted by the member institutes of the Verian network[8] is annexed to this report. It also specifies the confidence intervals.

Following the EU General Data Protection Regulation[9] (GDPR), respondents were asked whether or not they would agree to be asked questions on issues that could be considered 'sensitive'.

Note: In this report, EU Member States are referred to by their official abbreviation. The abbreviations used in this report correspond to:

Belgium	BE	Lithuania	LT
Bulgaria	BG	Luxembourg	LU
Czechia	CZ	Hungary	HU
Denmark	DK	Malta	MT
Germany	DE	The Netherlands	NL
Estonia	EE	Austria	AT
Ireland	IE	Poland	PL
Greece	EL	Portugal	PT
Spain	ES	Romania	RO
France	FR	Slovenia	SI
Croatia	HR	Slovakia	SK
Italy	IT	Finland	FI
Republic of Cyprus	CY *	Sweden	SE
Latvia	LV		
European Union – weighted average for the 27 Member States			EU27

* Cyprus as a whole is one of the 27 European Union Member States. However, the *acquis communautaire* has been suspended in the part of the country not controlled by the government of the Republic of Cyprus. For practical reasons, only the interviews carried out in the part of the country controlled by the government of the Republic of Cyprus are included in the 'CY' category and in the EU27 average.

We wish to thank the people throughout the European Union who have given their time to take part in this survey.

Without their active participation, this study would not have been possible.

[6] https://www.europa.eu/eurobarometer
[7] The results tables are annexed. It should be noted that the total of the percentages indicated in the tables in this report may exceed 100% when the respondent was able to choose several answers to the same question.
[8] Verian's international network of offices and experts
[9] 2016/679



Key findings

Most EU citizens do not feel well informed about innovative foods and their attitudes remain cautious

- While nearly seven in ten Europeans have heard about innovative foods (69% including 45% who have heard only a little), most do not feel well informed about them (72%).
- Prior awareness of the topic is highest in Sweden (89%), followed by the Netherlands (84%) and Denmark and Finland (both 80%).
- Respondents are most likely to feel informed about innovative foods in Austria (40%), Poland (38%) and the Netherlands (37%). However, even in these countries, a majority of respondents say they do not feel informed about the topic.
- At EU level, attitudes towards innovative foods are marked by caution, with negative views (51%) outweighing positive ones (39%). However, in four countries, a majority of respondents have a positive view of innovative foods: the Netherlands (69%), Sweden (65%), Finland (57%) and Denmark (54%).
- Younger and more educated respondents tend to be more familiar with innovative foods and hold more positive views of them.
- Europeans are more comfortable with innovations that are closer to traditional foods such as fruits or vegetables adapted to better withstand drought, pests or extreme weather, while acceptance declines for the other product types tested, particularly products from animal cells.

Europeans recognise opportunities associated with innovative foods, but concerns remain centred on health, production methods and transparency

- Potential long-term unknown health impacts are the most commonly cited concern associated with innovative foods, mentioned by 43% of Europeans, followed by the perception that they are processed or unnatural (35%) and a lack of clear information about their production, composition or origin (33%).
- At the same time, Europeans also recognise several potential opportunities associated with innovative foods. The most frequently cited benefit is reducing pressure on natural resources (27%), followed by supporting food security and improving consumer choice through clear information and labelling (both 25%).

Transparency and regulation emerge as key conditions for public acceptance

- Transparency is the strongest area of consensus across the survey. More than eight in ten Europeans (85%) agree that innovative food products should have clear and distinct names, accompanied by transparent information about how they are produced, their composition and their origin.
- Moreover, clear labelling is the most important measure for increasing confidence in innovative foods. A majority of Europeans (51%) say their confidence would increase if products were accompanied by mandatory, clear labelling.
- Independent verification also plays a major role in building trust. Europeans are most likely to cite independent safety assessments beyond the producer's own data (38%), EFSA approval[10] (36%) and regular public reporting on safety findings (34%) as measures that are important for their confidence.
- Support for transparency coexists with recognition of the potential benefits of innovation. A majority of respondents agree that food innovation can support research and employment (70%) and agricultural resilience (68%).

Willingness to purchase innovative foods remains limited, despite guarantees on safety and labelling

- Product naming matters, with consumers preferring familiar and accessible terminology like ‘cultivated’ (28%) and ‘animal-free’ (25%).
- Even when innovative food products are described as meeting EU safety standards and being clearly labelled, Europeans remain more unwilling than willing to purchase them (54% vs. 42%).

[10] Under the EU regulatory framework, EFSA conducts the scientific risk assessment, while authorisation is taken through the applicable EU risk-management procedure.

- Willingness to buy varies considerably across Member States. Respondents are most willing to purchase such products in the Netherlands (74%), Sweden (64%) and Belgium (55%), while willingness is lowest in Cyprus (19%), Greece (22%) and Lithuania (26%).
- Among respondents willing to purchase innovative foods, a majority (56%) would buy them if priced the same as conventional alternatives indicating that wider uptake is more dependent on product acceptance than on lower prices.
- The most appealing factor that would encourage Europeans to consume innovative foods more regularly is a reduced use of pesticides, fertilisers or antibiotics (35%).

Taken together, the findings show that Europeans already recognise the possible value of food innovation, but that acceptance is product-specific and conditional on clear benefits, transparent information, independent safety assessment and credible public oversight.



I. Awareness, knowledge and attitudes towards innovative foods

1. Awareness and knowledge of innovative foods

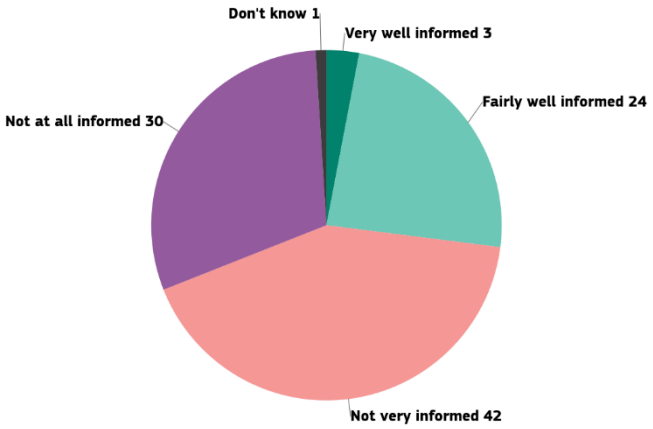
Most Europeans do not feel well informed about innovative foods.

This first chapter examines Europeans' awareness, knowledge and general attitudes towards innovative foods[11][12]. It starts by looking at how informed citizens feel about innovative foods and how much they had heard, read or seen about the topic before the interview. It then considers whether Europeans hold positive or negative views overall, before exploring their level of comfort with different types of innovative foods.

At EU level, nearly three quarters of respondents (72%) say they are *not well informed* about innovative foods, including 42% who feel *not very informed* and 30% who *feel not at all informed*. In contrast, just over one quarter (27%) consider themselves informed, while only a very small proportion (3%) say they are *very well informed*. These findings indicate that innovative foods remain a new and relatively unfamiliar topic for much of the European public.

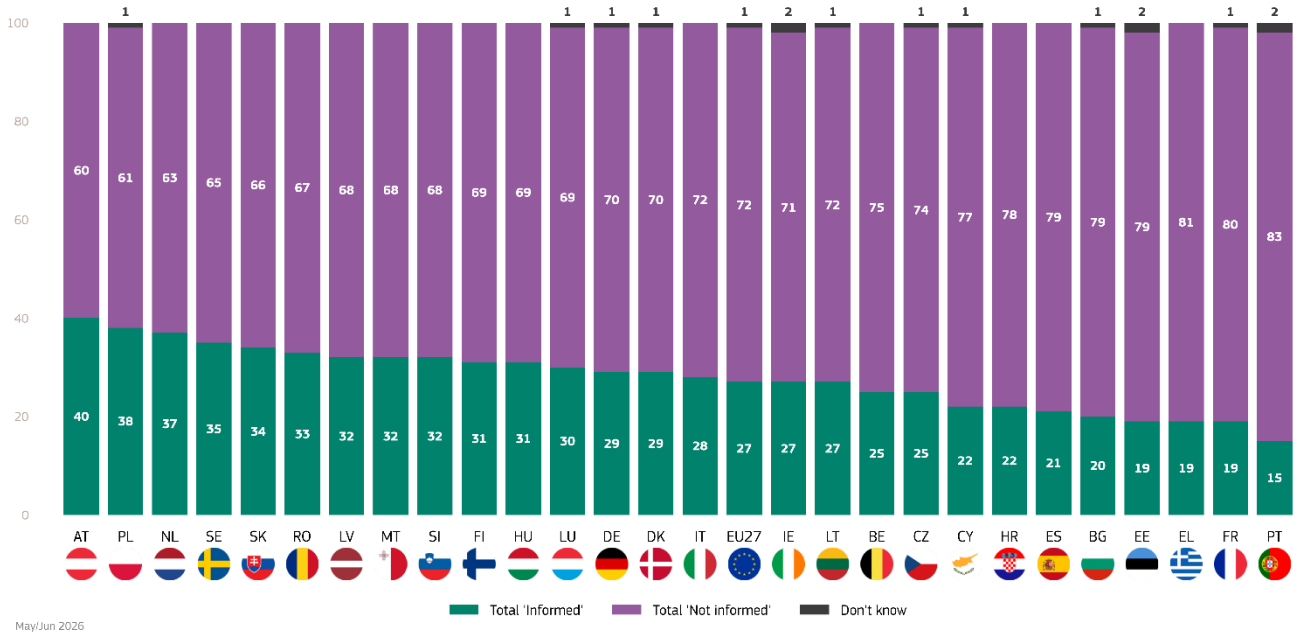
A **national analysis** shows that the share of respondents who feel informed remains below one third in most Member States. The lowest levels of feeling informed are observed in Portugal (15%), followed by France, Greece and Estonia (all 19%), and Bulgaria (20%). By contrast, respondents are most likely to say they feel informed in Austria (40%), Poland (38%) and the Netherlands (37%), although even in these countries a majority still say they are not informed.

QC1: To what extent do you feel informed about innovative foods? (EU27) (%)



May/Jun 2026

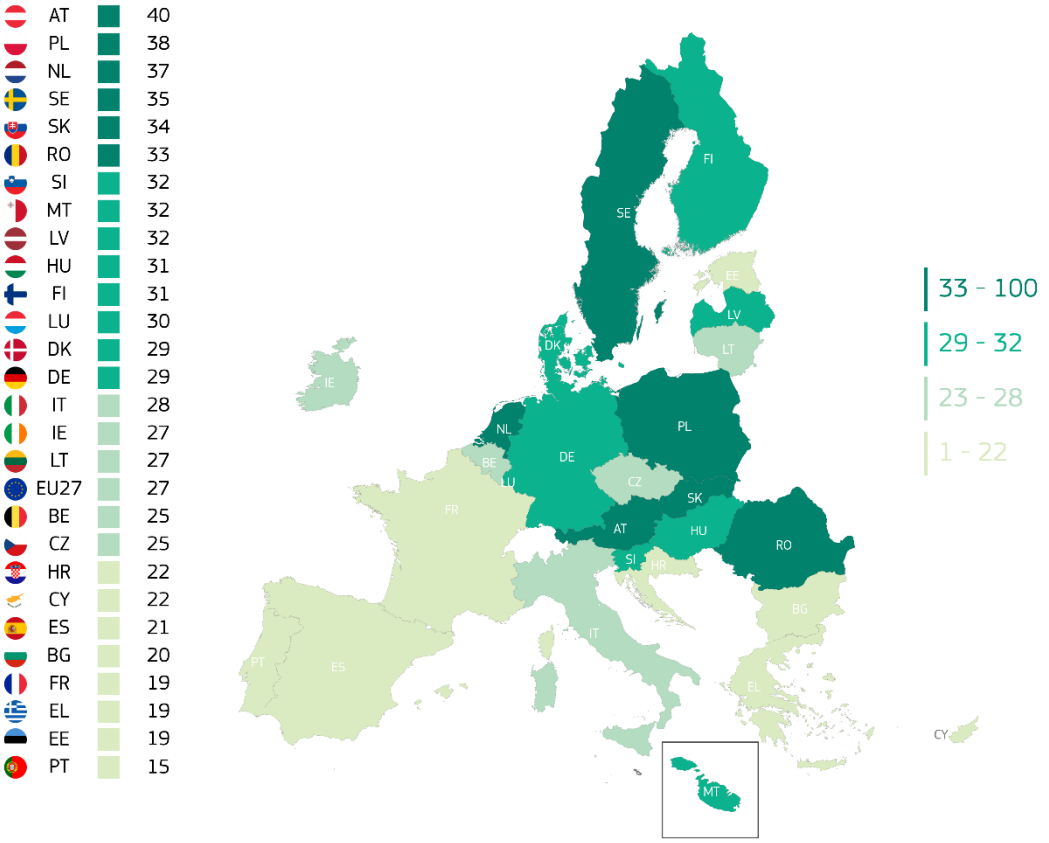
QC1: To what extent do you feel informed about innovative foods? (%)



May/Jun 2026

[11] QC1. To what extent do you feel informed about innovative foods?
[12] Innovative foods are foods or food ingredients developed using advanced technologies, including fermentation-derived ingredients, climate-resilient crops, alternative proteins, products derived from animal cells, and hybrid products combining conventional and novel food technologies.

QC1: To what extent do you feel informed about innovative foods? - Total 'Informed' (EU27) (%)



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The socio-demographic analysis shows that self-reported knowledge about innovative foods varies mainly by age and education:

- There are no meaningful differences between men and women, with 28% and 26% respectively saying they feel informed about innovative foods;
- Differences are more apparent by age. Respondents aged 25-39 (32%) and 40-54 (31%) are more likely than average (27%) to say they feel informed, while those aged 55 and over are less likely to do so (22%). Respondents aged 15-24 are in line with the EU average (27%);
- Education is also associated with higher levels of information. Respondents who completed their education at the age of 20 or later are more likely to feel informed (32%), while those who left education at age 15 or earlier are considerably less likely to do so (15%);
- Some differences are also observed across socio-professional categories. Managers (35%), the self-employed (32%) and other white-collar workers (32%) are more likely than average to say they feel informed about innovative foods;
- Respondents living in large towns are slightly more likely to be informed about innovative foods than those from rural areas and small towns (30% vs. both 26%).

QC1 To what extent do you feel informed about innovative foods? (% - EU)

	Total 'Informed'	Total 'Not informed'	Don't know
EU27	27	72	1
Gender			
Man	28	71	1
Woman	26	73	1
Age			
15-24	27	72	1
25-39	32	67	1
40-54	31	69	0
55+	22	77	1
Education (End of)			
15-	15	84	1
16-19	25	75	0
20+	32	67	1
Still Studying	29	71	0
Socio-professional category			
Self-employed	32	67	1
Managers	35	64	1
Other white collars	32	67	1
Manual workers	28	72	0
House persons	23	77	0
Unemployed	23	77	0
Retired	20	79	1
Students	27	72	1
Subjective urbanisation			
Rural area or village	26	74	0
Small or middle sized town	26	73	1
Large town	30	69	1

Around seven in ten Europeans (69%) had heard, read or seen at least something about innovative foods.

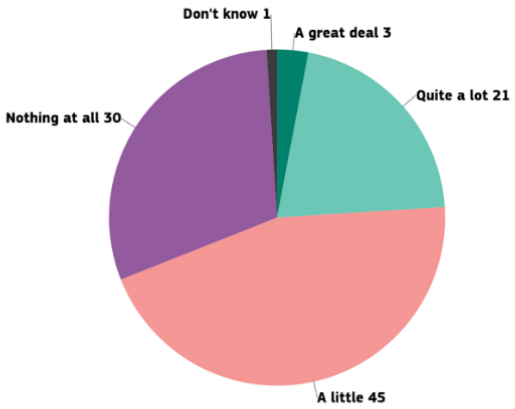
Europeans were asked how much they had heard, read or seen about innovative foods before the interview[13]. The results suggest that exposure to the topic remains relatively limited, with most respondents reporting only limited prior awareness.

At EU level, around seven in ten Europeans (69%) have heard about innovative foods but awareness remains limited, with most reporting only having heard *a little* (45%). A further 30% say they had heard *nothing at all*, while 21% report having heard *quite a lot*. Only a small minority (3%) say they had heard *a great deal* about innovative foods, while 1% do not express an opinion.

A national analysis shows that prior exposure to innovative foods varies considerably across Member States. In all but one Member State, a majority of respondents say they had heard, read or seen at least something about innovative foods before the interview.

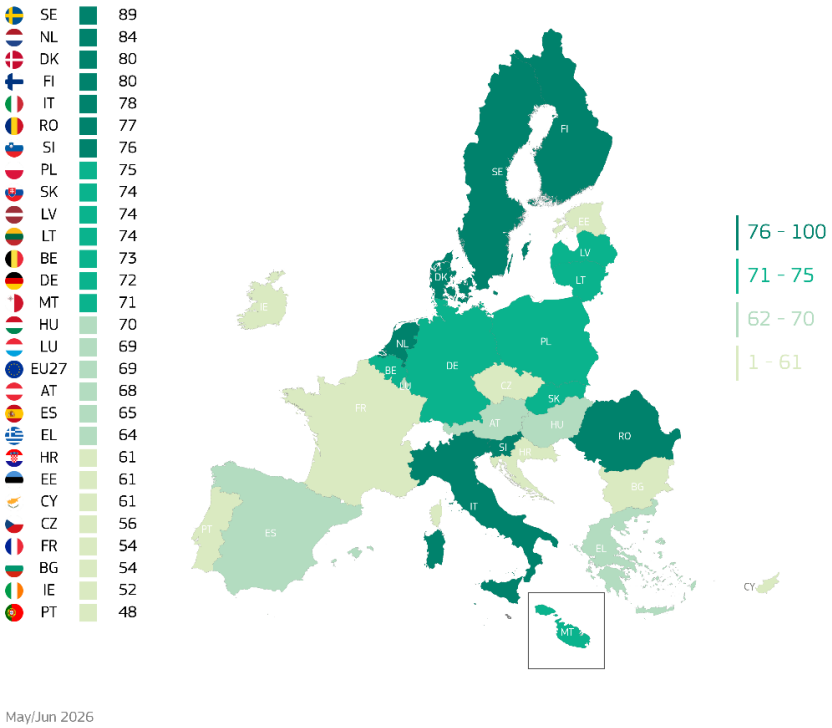
Respondents are most likely to have heard of innovative foods in Sweden (89%), followed by the Netherlands (84%), Denmark and Finland (both 80%). By contrast, the lowest levels are observed in Portugal (48%), Ireland (52%), Bulgaria and France (both 54%).

QC2: Before this interview, how much have you heard, read or seen about innovative foods? (EU27) (%)



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QC2: Before this interview, how much have you heard, read or seen about innovative foods? - Total 'Have heard of' (EU27) (%)



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[13] QC2. Before this interview, how much have you heard, read or seen about innovative foods?

The **socio-demographic analysis** shows that prior exposure to innovative foods varies mainly by age, education, socio-professional category and self-reported level of information:

- There are no meaningful differences between men and women, with both groups equally likely to say they had heard at least something about innovative foods before the interview (69%);
- Differences are more visible by age. Respondents aged 25-39 (74%) and 40-54 (75%) are more likely than average (69%) to have heard of innovative foods, while those aged 55 and over are less likely to have done so (64%). Respondents aged 15-24 are broadly in line with the EU average (66%);
- Education is also strongly associated with exposure to the topic. Respondents who completed their education at age 20 or later are more likely to have heard of innovative foods (78%), while those who left education at age 15 or earlier are much less likely to have done so (51%);
- There are also differences across socio-professional categories. Managers (80%), the self-employed (78%) and other white-collar workers (73%) are more likely than average to have heard of innovative foods;
- By subjective urbanisation, respondents living in large towns are slightly more likely to have heard of innovative foods (73%), while those living in rural areas or villages (66%);
- Unsurprisingly, prior exposure is much higher among respondents who feel well informed about innovative foods: almost all of them (97%) say they had heard, read or seen at least something about the topic, compared with 59% among those who do not feel well informed.

QC2 Before this interview, how much have you heard, read or seen about innovative foods?
(% - EU)

	Total 'Have heard of'	Total 'Have not heard of'	Don't know
EU27	69	30	1
Gender			
Man	69	30	1
Woman	69	31	0
Age			
15-24	66	33	1
25-39	74	25	1
40-54	75	25	0
55+	64	35	1
Education (End of)			
15-	51	48	1
16-19	67	33	0
20+	78	22	0
Still Studying	70	29	1
Socio-professional category			
Self-employed	78	22	0
Managers	80	20	0
Other white collars	73	26	1
Manual workers	71	29	0
House persons	59	41	0
Unemployed	61	38	1
Retired	61	38	1
Students	69	31	0
Subjective urbanisation			
Rural area or village	66	34	0
Small or middle sized town	68	31	1
Large town	73	26	1
Level of information about innovative foods			
Well informed	97	3	0
Not well informed	59	41	0

2. Overall views of innovative foods

Europeans tend to view innovative foods more negatively than positively.

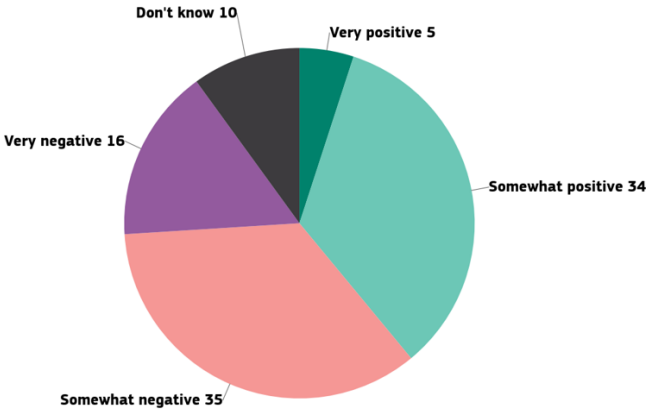
Europeans were asked whether they have a positive or negative view of innovative foods, regardless of how well informed they feel about the topic[14]. This question provides an overall measure of public attitudes towards food innovation before exploring specific products, concerns and opportunities in later sections.

At EU level, 39% of respondents have a *positive* view of innovative foods, including 34% who are *somewhat positive* and 5% who are *very positive*. In contrast, just over half of Europeans (51%) express a *negative view*, comprising 35% who are *somewhat negative* and 16% who are *very negative*. A further 10% of respondents do not express an opinion. Overall, the findings suggest that attitudes towards innovative foods are more often characterised by caution than enthusiasm.

A **national analysis** shows considerable variation in overall views of innovative foods across Member States. In four countries, a majority of respondents have a positive view of innovative foods: the Netherlands (69%), Sweden (65%), Finland (57%) and Denmark (54%).

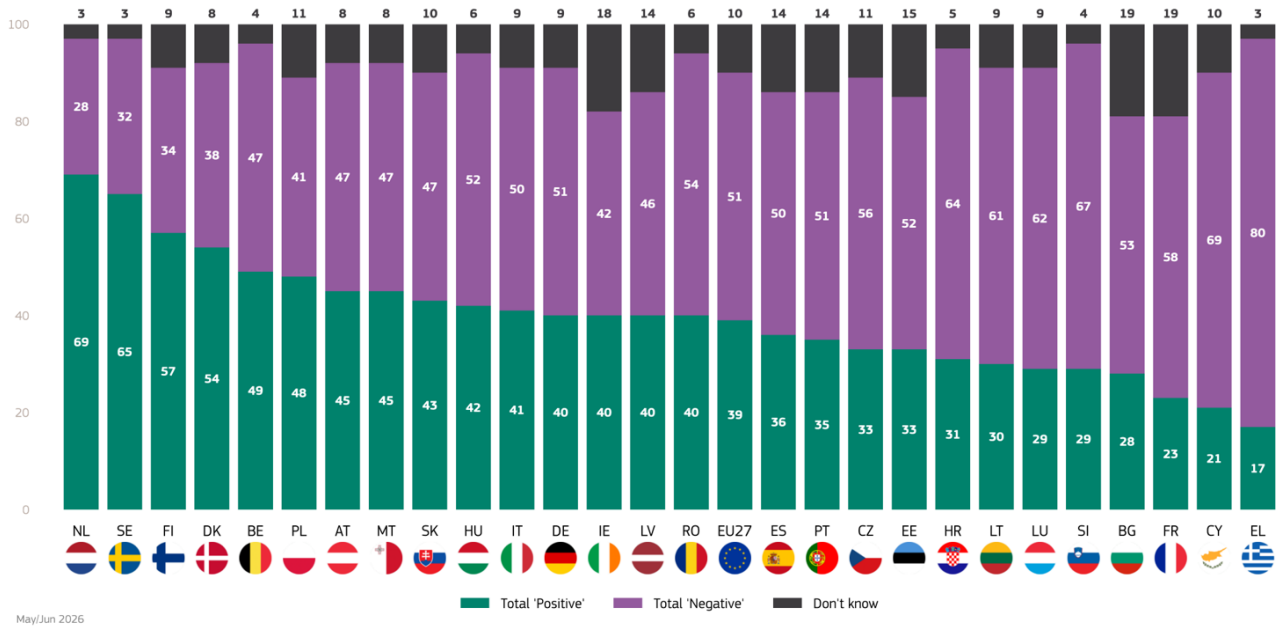
By contrast, negative views are most widespread in Greece (80%), Cyprus (69%), and Slovenia (67%). The proportion of respondents who do not express an opinion is highest in Bulgaria and France (both 19%), followed by Ireland (18%), and Estonia (15%).

QC3: Regardless of how well informed you feel, would you say that you have a positive or negative view of innovative foods? (EU27) (%)



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QC3: Regardless of how well informed you feel, would you say that you have a positive or negative view of innovative foods? (%)



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[14] QC3. Regardless of how well informed you feel, would you say that you have a positive or negative view of innovative foods?

The **socio-demographic analysis** shows that views of innovative foods vary mainly by age, education, socio-professional category, urbanisation, and familiarity with the topic:

- There are no meaningful differences between men and women, with 40% of men and 38% of women expressing a positive view;
- Positive views are more common among younger respondents. Nearly half of those aged 15-24 (47%) and 25-39 (48%) have a positive view of innovative foods, compared with 39% at EU level. By contrast, respondents aged 55 and over are less likely to be positive (31%) and more likely to express a negative view (58%);
- Education is also strongly associated with attitudes. Respondents who completed their education at age 20 or later (47%) are more likely to have a positive view, while those who left education at age 15 or earlier are much less likely to do so (21%) and are the most likely to express a negative view (65%);
- Differences are also observed across socio-professional categories. Students (50%), managers (49%) and other white-collar workers (44%) are more likely than average to have a positive view of innovative foods;
- Respondents living in large towns are more likely to have a positive view of innovative foods (46%) than those living in rural areas or villages (35%);
- Attitudes are closely linked to familiarity with the topic. Respondents who feel well informed about innovative foods are much more likely to have a positive view (72%), compared with 27% among those who do not feel well informed. Similarly, half of those who had heard, read or seen something about innovative foods before the interview express a positive view (50%), compared with only 15% among those who had not heard of the topic. This suggests that prior awareness and self-reported knowledge are strongly associated with more favourable attitudes towards innovative foods.

QC3 Regardless of how well informed you feel, would you say that you have a positive or negative view of innovative foods?
(% - EU)

	Total 'Positive'	Total 'Negative'	Don't know
EU27	39	51	10
Gender			
Man	40	50	10
Woman	38	51	11
Age			
15-24	47	40	13
25-39	48	42	10
40-54	41	50	9
55+	31	58	11
Education (End of)			
15-	21	65	14
16-19	36	54	10
20+	47	43	10
Still Studying	48	41	11
Socio-professional category			
Self-employed	42	50	8
Managers	49	42	9
Other white collars	44	47	9
Manual workers	39	51	10
House persons	28	57	15
Unemployed	35	48	17
Retired	29	59	12
Students	50	39	11
Subjective urbanisation			
Rural area or village	35	55	10
Small or middle sized town	38	51	11
Large town	46	44	10
Level of information about innovative foods			
Well informed	72	26	2
Not well informed	27	60	13
Prior awareness of innovative foods			
Have heard of	50	44	6
Have not heard of	15	65	20

3. Comfort with different types of innovative foods

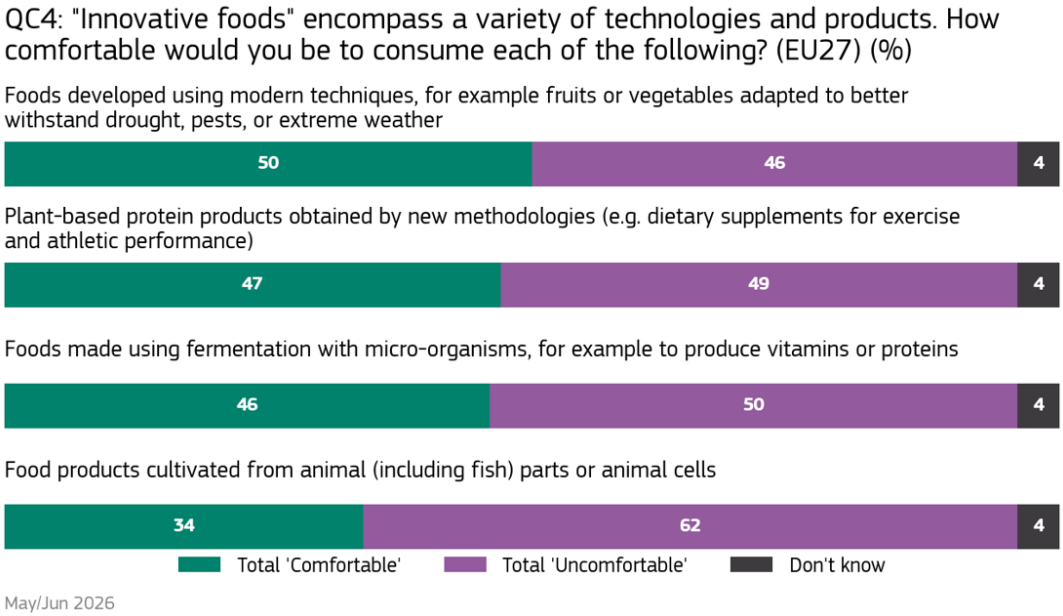
Europeans are most comfortable with foods developed using modern techniques such as fruits and vegetables adapted to better withstand drought, pests and extreme weather, while foods cultivated from animal cells face the greatest resistance.

Respondents were asked how comfortable they would be consuming different types of innovative foods[15]. The results show that acceptance varies depending on the type of food and production method, with products linked to crop innovation attracting the highest levels of comfort, while foods cultivated from animal cells generate the greatest reluctance.

At EU level, respondents are most comfortable consuming **foods developed using modern techniques, such as fruits or vegetables adapted to better withstand drought, pests or extreme weather**, with half of Europeans saying they would be comfortable consuming such products, compared with 46% who would be uncomfortable and 4% who do not express an opinion.

Levels of comfort are slightly lower for **plant-based protein products obtained through new methodologies, such as dietary supplements for exercise and athletic performance**, with 47% saying they would be comfortable consuming them and 49% uncomfortable. Similarly, 46% of Europeans say they would be comfortable consuming **foods made using fermentation with micro-organisms**, while half would be uncomfortable doing so.

Attitudes are markedly more negative towards **food products cultivated from animal parts or animal cells**. Only around one third of respondents (34%) say they would be comfortable consuming such products, while almost two thirds (62%) say they would be uncomfortable, making this by far the least accepted type of innovative food included in the survey.

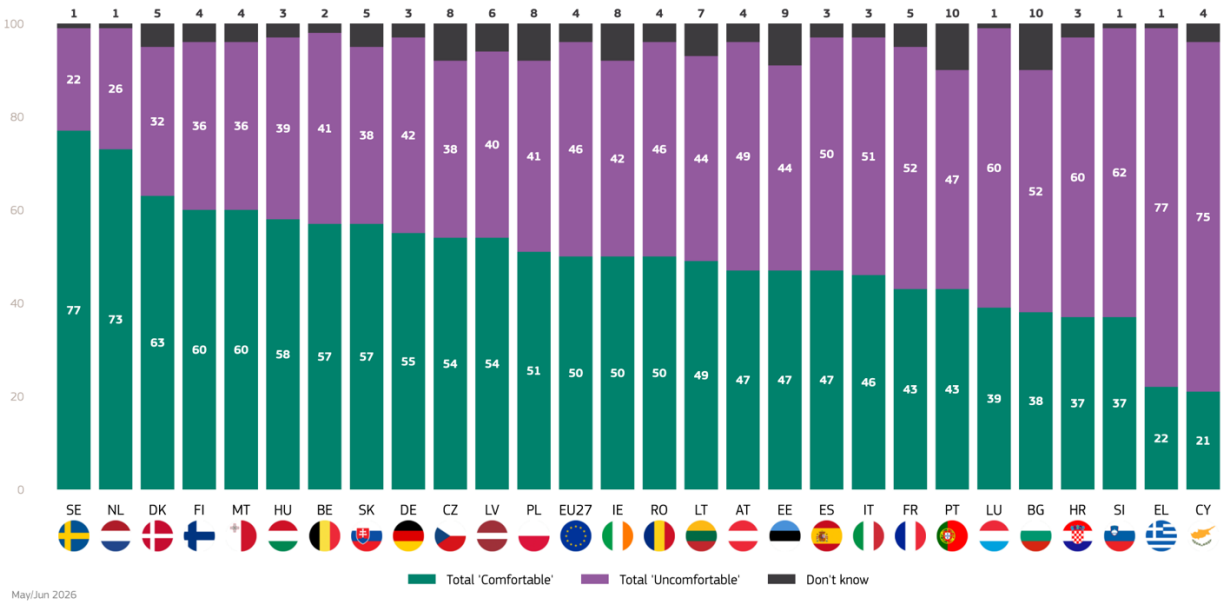


[15] QC4. "Innovative foods" encompass a variety of technologies and products. How comfortable would you be to consume each of the following?

A **national analysis** shows that comfort with consuming foods developed using modern techniques, such as fruits or vegetables adapted to better withstand drought, pests or extreme weather, varies widely across Member States. In 14 Member States, at least half of respondents say they would be comfortable consuming such foods.

Comfort is highest in Sweden (77%) and the Netherlands (73%), followed by Denmark (63%). By contrast, respondents are least likely to feel comfortable consuming these products in Cyprus (21%), Greece (22%), in Slovenia and Croatia (both 37%).

QC4.4: "Innovative foods" encompass a variety of technologies and products. How comfortable would you be to consume each of the following? - Foods developed using modern techniques, for example fruits or vegetables adapted to better withstand drought, pests, or extreme weather (%)

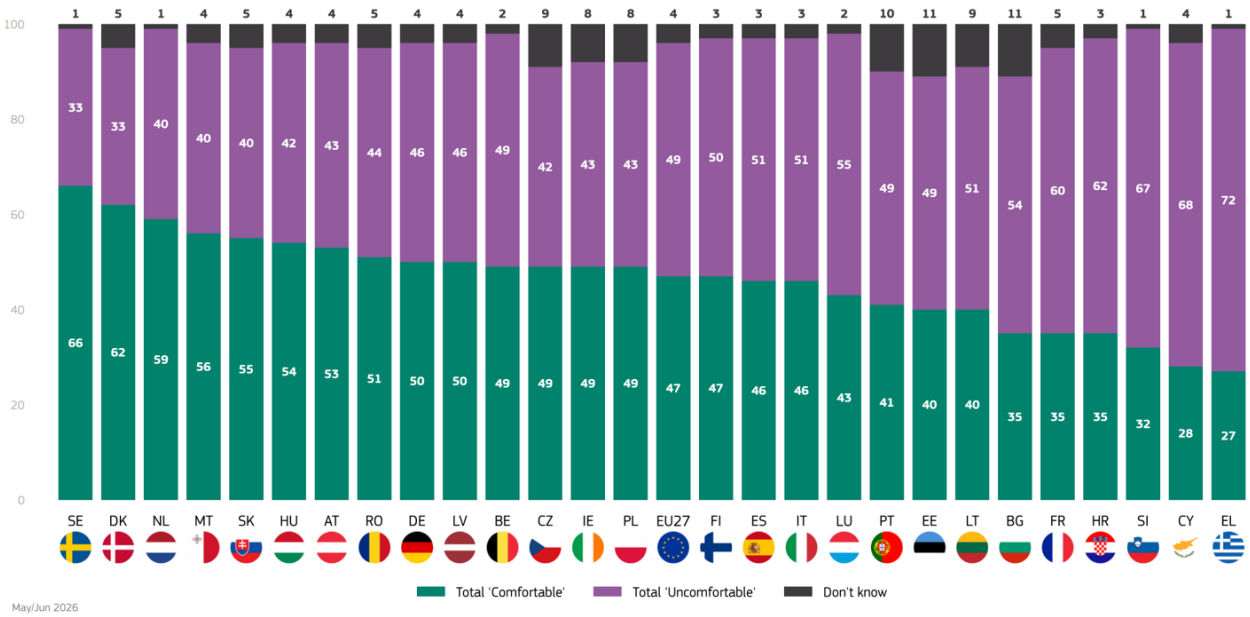


May/Jun 2026

In ten Member States, at least half of respondents say they would feel comfortable consuming **plant-based protein products obtained by new methodologies**. Comfort is highest in Sweden (66%), followed by Denmark (62%), and the Netherlands (59%).

At the other end of the scale, respondents are least likely to feel comfortable consuming these products in Greece (27%), Cyprus (28%), and Slovenia (32%).

QC4.2: "Innovative foods" encompass a variety of technologies and products. How comfortable would you be to consume each of the following? - Plant-based protein products obtained by new methodologies (e.g. dietary supplements for exercise and athletic performance) (%)

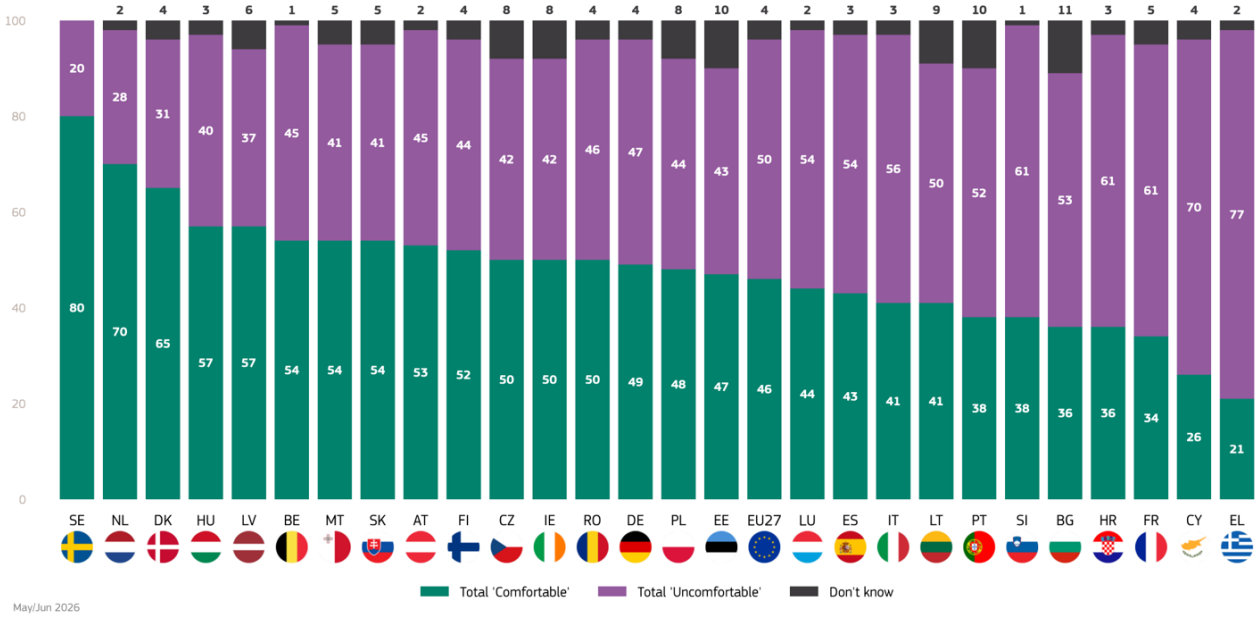


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In 13 Member States, at least half of respondents say they would feel comfortable consuming **foods made using fermentation with micro-organisms, for example to produce vitamins or proteins**.

Comfort is highest in Sweden (80%), followed by the Netherlands (70%) and Denmark (65%), while it is the lowest in Greece (21%), Cyprus (26%), and France (34%).

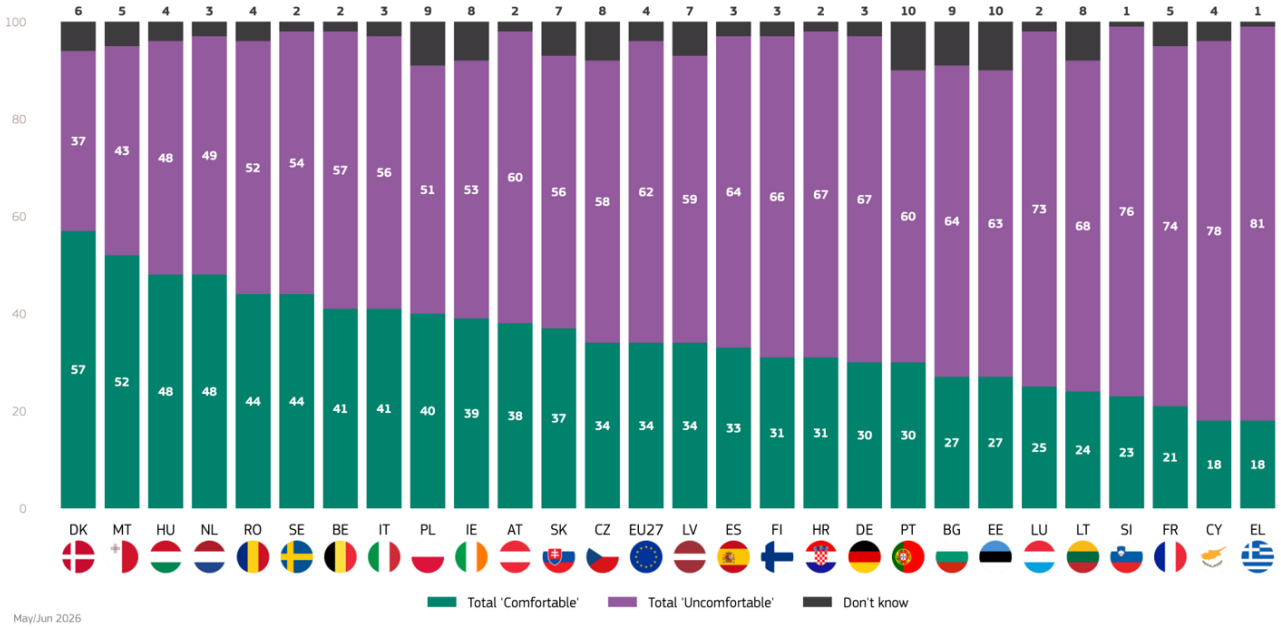
QC4.1: "Innovative foods" encompass a variety of technologies and products. How comfortable would you be to consume each of the following? - Foods made using fermentation with micro-organisms, for example to produce vitamins or proteins (%)



Finally, in only two Member States, at least half of respondents say they would feel comfortable consuming food **products cultivated from animal parts or animal cells**. Comfort is highest in Denmark (57%), followed by Malta (52%). These are the only countries where comfortable respondents outnumber those who feel uncomfortable.

At the other end of the scale, respondents are least likely to feel comfortable consuming these products in Greece and Cyprus (both 18%), followed by France (21%) and Slovenia (23%).

QC4.3: "Innovative foods" encompass a variety of technologies and products. How comfortable would you be to consume each of the following? - Food products cultivated from animal (including fish) parts or animal cells (%)



The **socio-demographic analysis** shows that comfort is consistently higher among younger respondents, those with higher levels of education, urban respondents, and those who are more familiar with innovative foods:

- There are only limited differences between men and women for most items. The only notable gap is for food products cultivated from animal parts or animal cells, where men are more likely than women to feel comfortable consuming them (37% vs. 32%);
- Age differences are clear across all four items. Respondents aged 15-24 and 25-39 are more likely than average to feel comfortable consuming each type of innovative food, particularly plant-based protein products and fermentation-based foods. By contrast, respondents aged 55 and over are less likely to feel comfortable across all items, especially with plant-based protein products (34%), fermentation-based foods (35%) and animal cell-based products (26%);
- Education is strongly associated with comfort. Respondents who completed their education at age 20 or older are more likely to feel comfortable with all four types of innovative foods. In contrast, those who left education at age 15 or earlier are consistently the least comfortable, particularly with plant-based protein products (26%), fermentation-based foods (23%) and animal cell-based products (22%);
- Respondents living in large towns are more likely to feel comfortable with all four types of innovative foods than those living in rural areas or villages. The gap is especially visible for foods developed using modern techniques to improve crop resilience (57% vs. 46%) and plant-based protein products (53% vs. 42%);
- Familiarity with innovative foods is also linked to comfort. Respondents who feel well informed about innovative foods are much more likely than those who do not feel well informed to be comfortable with all four items. The difference is particularly large for foods made using fermentation with micro-organisms (72% vs. 36%);
- Prior exposure shows a similar pattern. Respondents who had heard about innovative foods before are more likely to feel comfortable with each product type. For example, 59% of those who have heard feel comfortable with foods developed using modern techniques, compared with 32% among those without prior exposure;
- Attitudes towards innovative foods are the strongest predictor of comfort. Respondents with a positive view of innovative foods are much more likely to feel comfortable consuming all four types, while those with a negative view are consistently much less likely to do so. This gap is especially pronounced for fermentation-based foods (81% vs. 21%) and plant-based protein products (79% vs. 22%).

QC4 "Innovative foods" encompass a variety of technologies and products. How comfortable would you be to consume each of the following?
Total 'Comfortable'
(% - EU)

	Foods developed using modern techniques, for example fruits or vegetables adapted to better withstand drought, pests, or extreme weather	Plant-based protein products obtained by new methodologies (e.g. dietary supplements for exercise and athletic performance)	Foods made using fermentation with micro-organisms, for example to produce vitamins or proteins	Food products cultivated from animal (including fish) parts or animal cells
EU27	50	47	46	34
Gender				
Man	51	48	47	37
Woman	50	45	45	32
Age				
15-24	58	61	58	42
25-39	57	58	55	42
40-54	52	50	49	37
55+	43	34	35	26
Education (End of)				
15-	32	26	23	22
16-19	48	43	41	33
20+	57	54	56	38
Still Studying	60	62	59	41
Socio-professional category				
Self-employed	50	50	46	36
Managers	61	58	60	41
Other white collars	53	51	51	39
Manual workers	51	47	46	38
House persons	40	36	33	29
Unemployed	50	49	45	32
Retired	42	31	32	23
Students	59	62	59	42
Subjective urbanisation				
Rural area or village	46	42	42	30
Small or middle sized town	49	44	45	34
Large town	57	53	52	40
Level of information about innovative foods				
Well informed	71	71	72	59
Not well informed	43	37	36	25
Prior awareness of innovative foods				
Have heard of	59	56	56	42
Have not heard of	32	26	23	16
Attitude towards innovative foods				
Positive	81	79	81	65
Negative	27	22	21	13



II. Perceived risks and opportunities of innovative foods

1. Concerns associated with innovative foods

Europeans' concerns about innovative foods are primarily driven by potential long-term health impacts.

Europeans were asked which concerns, if any, would be most important to them before consuming innovative food products, ingredients or crops[16]. Respondents could select up to two concerns, providing insight into the main barriers to acceptance of innovative foods.

At EU level, the most frequently cited concern is **potential long-term unknown health impacts**, mentioned by 43% of respondents. This is followed by concerns that **innovative foods may be highly processed or unnatural** (35%) and by a **lack of clear information on how they are produced, their composition or origin** (33%).

A quarter of Europeans (25%) also cite **a lack of trust in the companies producing these products**, while 19% mention their **possible impact on farmers, rural areas or traditional food production**. A further 17% say their main concern would be a **belief that current food systems already work well**.

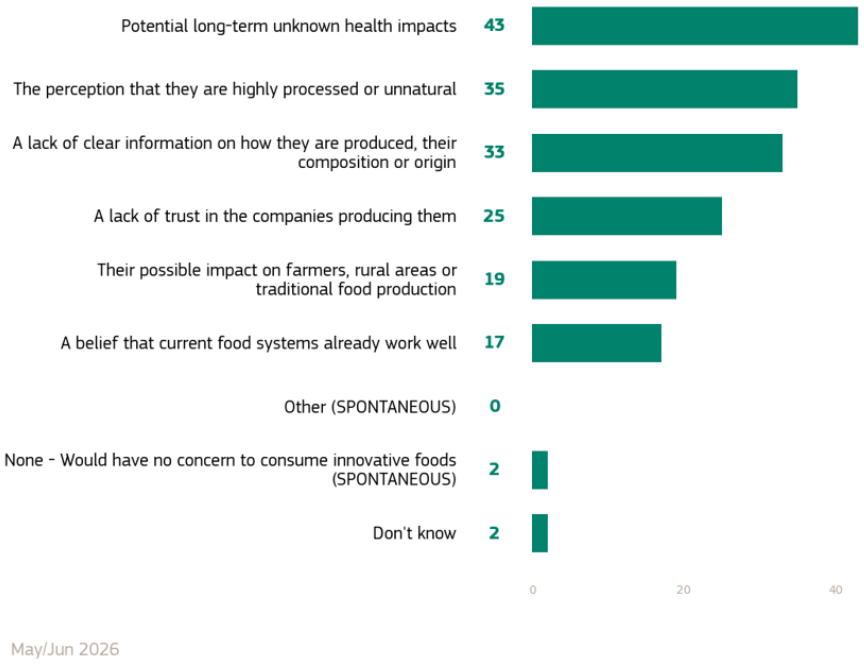
Very few respondents spontaneously say they would have no concerns about consuming innovative foods (2%), while an equally small proportion (2%) do not express an opinion.

Overall, health-related concerns, perceptions of naturalness, and the availability of clear information emerge as the main barriers to acceptance of innovative foods among Europeans.

A national analysis shows that potential long-term unknown health impacts are the leading concern in most Member States. This is the most frequently mentioned concern in 19 Member States, specifically in the Netherlands (62%), Denmark (60%), Finland (58%) and joint highest in Slovakia, where it is mentioned by the same proportion as a lack of clear information (39%).

In six Member States, the leading concern is the perception that innovative foods are highly processed or unnatural. This is the case in Greece (44%), Bulgaria (43%), Cyprus (40%), Italy (38%), Poland (33%) and Romania (31%).

QC5: Which of the following, if any, would be your most important concerns before consuming innovative food products, ingredients or crops? (MAX. 2 ANSWERS) (%)

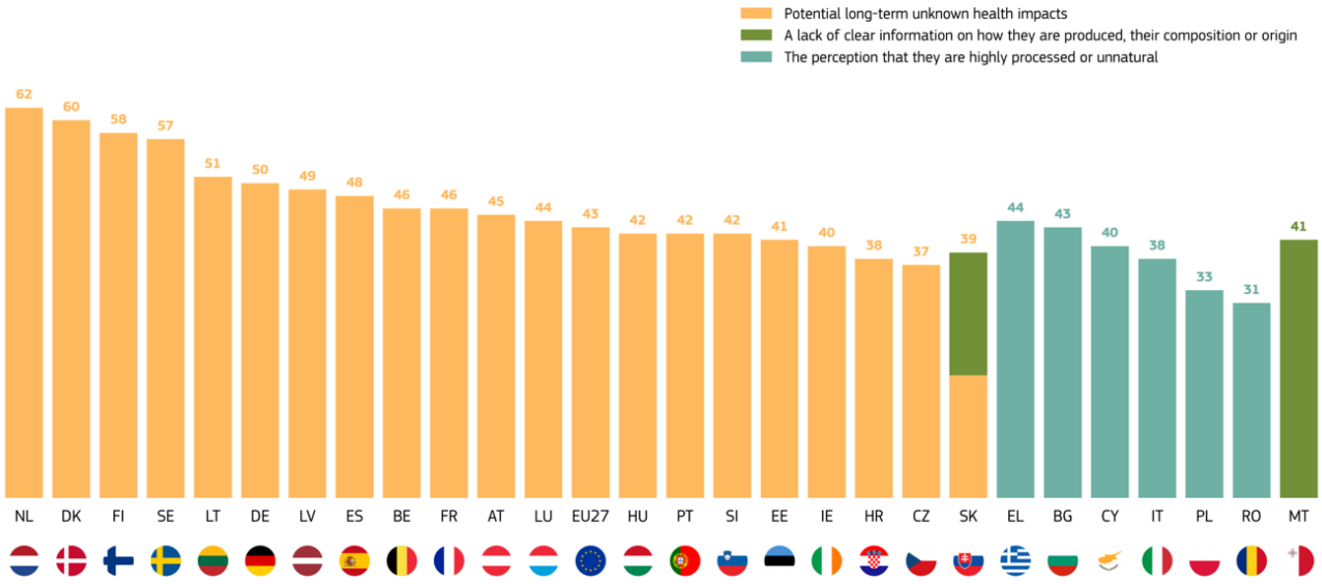


[16] QC5. Which of the following, if any, would be your most important concerns before consuming innovative food products, ingredients or crops? (MAX. 2 ANSWERS)

A lack of clear information on how innovative foods are produced, their composition or origin is the leading concern only in Malta (41%), and joint-leading in Slovakia (39%). It is also frequently mentioned in Spain and Sweden (both 41%), the Netherlands (39%), and Bulgaria (37%).

Other concerns are generally mentioned less often. A lack of trust in the companies producing innovative foods is highest in Greece (31%) and Cyprus (30%), while concern about the possible impact on farmers, rural areas or traditional food production is most frequently cited in Croatia, Austria and Sweden (all 25%). The belief that current food systems already work well is most common in Estonia, Austria and Poland (all 22%), but remains a secondary concern in all Member States.

QC5: Which of the following, if any, would be your most important concerns before consuming innovative food products, ingredients or crops? (MAX. 2 ANSWERS) (%)



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QC5: Which of the following, if any, would be your most important concerns before consuming innovative food products, ingredients or crops? (MAX. 2 ANSWERS) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Potential long-term unknown health impacts	43	46	41	37	60	50	41	40	40	48	46	38	33	38	49	51	44	42	38	62	45	29	42	29	42	39	58	57
The perception that they are highly processed or unnatural	35	39	43	35	38	27	31	27	44	31	44	31	38	40	29	42	42	35	40	39	33	33	34	31	36	30	45	31
A lack of clear information on how they are produced, their composition or origin	33	31	37	33	36	31	31	35	35	41	30	35	36	32	36	26	34	30	41	39	31	31	28	29	30	39	34	41
A lack of trust in the companies producing them	25	23	22	23	22	28	17	27	31	20	26	26	27	30	16	17	28	23	27	19	27	25	21	23	23	26	12	26
Their possible impact on farmers, rural areas or traditional food production	19	21	18	14	13	17	14	19	23	18	17	25	24	18	11	11	15	22	19	14	25	19	12	22	17	20	21	25
A belief that current food systems already work well	17	15	15	16	11	19	22	18	20	12	15	18	19	8	14	15	12	19	20	9	22	22	13	20	15	20	7	6
Other (SPONTANEOUS)	0	0	0	0	0	1	1	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	1	1	0	0	0	1
None - Would have no concern to consume innovative foods (SPONTANEOUS)	2	1	2	4	1	2	3	2	1	2	3	3	0	4	4	3	2	3	1	2	2	1	5	1	6	1	1	1
Don't know	2	1	2	2	5	2	5	4	1	2	2	1	1	3	2	4	0	1	1	1	1	2	7	3	1	1	1	0

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The **socio-demographic analysis** shows that the main concerns are broadly consistent across groups, with potential long-term unknown health impacts ranking first in almost all categories.

- There are no meaningful differences between men and women across the main concerns. Both men and women are most likely to mention potential long-term unknown health impacts (43% and 44%, respectively), followed by the perception that innovative foods are highly processed or unnatural (both 35%);
- Differences by age are also limited. Across all age groups, potential long-term unknown health impacts remain the most frequently cited concern, ranging from 41% among those aged 15-24 to 44% among those aged 40-54 and 55+;
- Education shows some variation. Respondents who completed their education at age 20 or later are more likely than those who left education at age 15 or earlier to mention potential long-term unknown health impacts (46% vs. 42%) and a lack of clear information on production, composition or origin (36% vs. 30%). Those who left education earliest are slightly more likely to say that current food systems work well (19% vs. 15%);
- Across socio-professional categories, potential long-term unknown health impacts are mentioned most by unemployed respondents (47%), and by the self-employed and retired respondents (both 45%). Managers are more likely than average to mention a lack of clear information (38% vs. 33%);
- Differences by degree of urbanisation are modest. Respondents living in rural areas or villages are slightly more likely to mention potential long-term unknown health impacts (45%) than those living in large towns (41%). Respondents in large towns are more likely to cite a lack of clear information (37%) than those in rural areas or villages (32%);
- Familiarity with innovative foods is associated with different types of concerns. Respondents who do not feel well informed are more likely than those who feel well informed to mention potential long-term unknown health impacts (46% vs. 37%) and the perception that innovative foods are highly processed or unnatural (37% vs. 30%). By contrast, those who feel well informed are more likely to mention possible impacts on farmers, rural areas or traditional food production (23% vs. 17%), a belief that current food systems already work well (20% vs. 15%) and lack of trust in food companies (28% vs. 24%);
- Respondents who had not heard of innovative foods before the interview are more likely than those who had heard of them to mention potential long-term unknown health impacts (46% vs. 42%) and the perception that these products are highly processed or unnatural (37% vs. 34%). By contrast, those who have prior awareness are more likely to mention possible impacts on farmers, rural areas or traditional food production (21% vs. 14%) and belief that current food systems already work well (18% vs. 14%);
- Attitudes towards innovative foods are strongly linked to concerns. Respondents with a negative view are more likely than those with a positive view to mention potential long-term unknown health impacts (47% vs. 39%) and the perception that innovative foods are highly processed or unnatural (39% vs. 30%). By contrast, respondents with a positive view are more likely to cite a lack of clear information (37% vs. 29%) and possible impacts on farmers, rural areas or traditional food production (23% vs. 17%).

QC5 Which of the following, if any, would be your most important concerns before consuming innovative food products, ingredients or crops? (MAX. 2 ANSWERS)
(% - EU)

	Potential long-term unknown health impacts	The perception that they are highly processed or unnatural	A lack of clear information on how they are produced, their composition or origin	A lack of trust in the companies producing them	Their possible impact on farmers, rural areas or traditional food production	A belief that current food systems already work well	Other (SPONTANEOUS)	None - Would have no concern to consume innovative foods (SPONTANEOUS)	Don't know
EU27	43	35	33	25	19	17	0	2	2
Gender									
Man	43	35	33	26	18	17	1	2	2
Woman	44	35	34	24	19	16	0	2	2
Age									
15-24	41	34	34	24	19	16	0	2	3
25-39	43	34	33	26	21	16	0	2	1
40-54	44	35	35	24	20	16	0	2	1
55+	44	36	33	25	18	17	1	2	2
Education (End of)									
15-	42	33	30	23	18	19	1	3	4
16-19	42	35	32	25	19	18	1	2	2
20+	46	36	36	24	19	15	0	1	1
Still Studying	44	34	34	25	18	14	0	3	3
Socio-professional category									
Self-employed	45	35	34	26	20	16	0	1	1
Managers	44	35	38	23	22	16	1	1	1
Other white collars	43	34	33	26	20	19	0	1	1
Manual workers	41	34	32	26	19	17	0	2	2
House persons	41	35	29	22	21	19	0	3	1
Unemployed	47	38	36	24	19	10	1	1	3
Retired	45	37	32	24	16	17	1	2	2
Students	43	33	34	25	19	14	0	2	3
Subjective urbanisation									
Rural area or village	45	33	32	22	20	17	1	2	2
Small or middle sized town	44	37	32	26	17	16	0	2	2
Large town	41	34	37	26	20	17	0	2	1
Level of information about innovative foods									
Well informed	37	30	32	28	23	20	0	2	1
Not well informed	46	37	34	24	17	15	0	2	2
Prior awareness of innovative foods									
Have heard of	42	34	34	25	21	18	0	1	1
Have not heard of	46	37	31	23	14	14	1	3	4
Attitude towards innovative foods									
Positive	39	30	37	27	23	18	0	2	0
Negative	47	39	29	25	17	17	1	2	2

2. Opportunities associated with innovative foods

The most cited opportunity associated with innovative foods is reducing pressure on natural resources.

While the previous findings highlight the concerns Europeans associate with innovative foods, the next section (3. – QC11) indicates that most Europeans (70%) agree that innovation in food systems can create new opportunities for research, skills and jobs in Europe. More than two thirds (68%) agree that food innovation can provide farmers and food producers with additional tools to respond to challenges such as climate change, pests, resource scarcity and supply disruptions

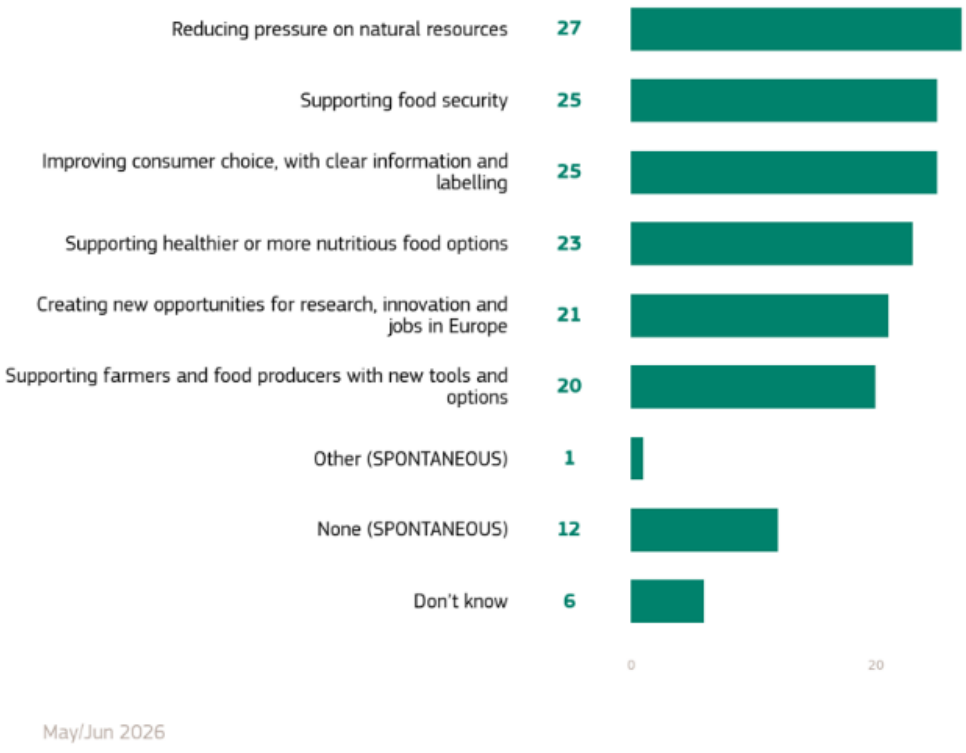
The survey's questions presented here also explored whether citizens identify any potential benefits. Respondents were therefore asked which opportunities, if any, they associate with innovative food products, ingredients or crops[17].

At EU level, the most frequently cited opportunity is **reducing pressure on natural resources**, mentioned by 27% of respondents. This is followed by **supporting food security** and **improving consumer choice through clear information and labelling** (both 25%). Around one quarter also associate innovative foods with **healthier or more nutritious food options** (23%).

Other perceived benefits are mentioned by around one in five Europeans, including **creating new opportunities for research, innovation and jobs** in Europe (21%) and **supporting farmers and food producers with new tools and options** (20%).

Only small proportions select other responses. While 12% spontaneously say they do not associate innovative foods with any of these opportunities, 6% do not express an opinion.

QC6: Which of the following possible opportunities, if any, do you associate with innovative food products, ingredients or crops? (MAX. 2 ANSWERS) (%)



[17] QC6. Which of the following possible opportunities, if any, do you associate with innovative food products, ingredients or crops? (MAX. 2 ANSWERS)

Overall, Europeans most commonly associate innovative foods with environmental sustainability, food security and greater consumer choice, while economic, nutritional and agricultural benefits are mentioned somewhat less frequently.

A **national analysis** shows that the opportunities associated with innovative foods vary considerably across Member States, although reducing pressure on natural resources is the leading opportunity in the largest number of countries.

Reducing pressure on natural resources is the most frequently mentioned opportunity in 11 Member States. It is cited most often in Sweden (51%), Denmark (48%), the Netherlands (46%) and Finland (43%).

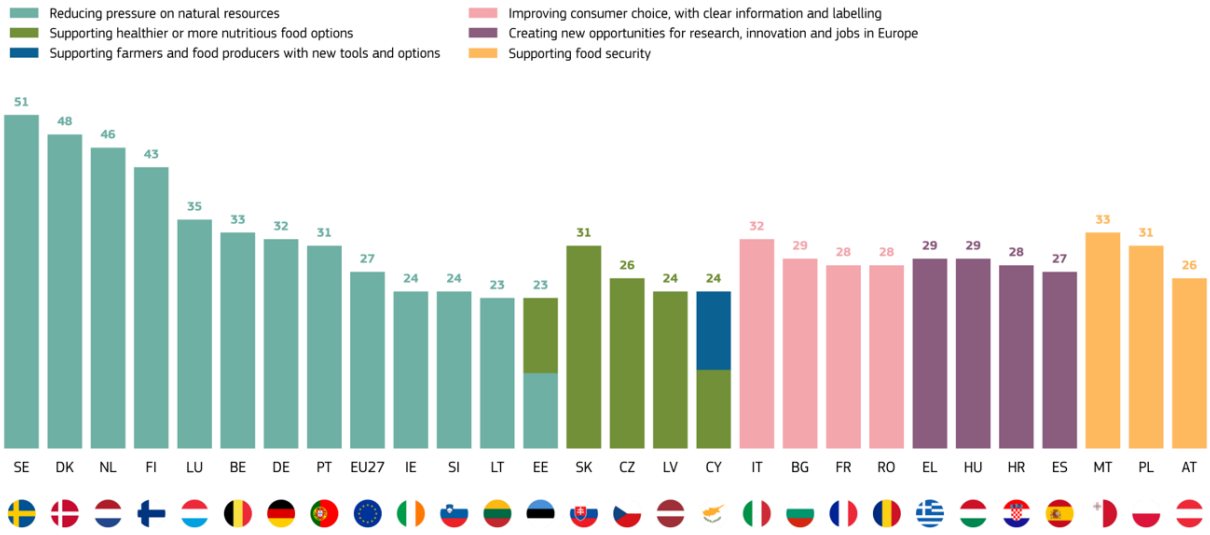
In several Member States, other opportunities rank first. Supporting healthier or more nutritious food options is the leading opportunity in Slovakia (31%), Czechia (26%), Latvia and Cyprus (both 24%), and Estonia where it is joint highest with reducing pressure on natural resources (both 23%).

Improving consumer choice, with clear information and labelling, is the leading opportunity in Italy (32%), Bulgaria (29%), France and Romania (both 28%). Meanwhile, creating new opportunities for research, innovation and jobs in Europe ranks first in Greece and Hungary (both 29%), Croatia (28%) and Spain (27%).

Supporting food security is the leading opportunity in Malta (33%), Poland (31%) and Austria (26%). In Cyprus, supporting farmers and food producers with new tools and options is joint highest with supporting healthier or more nutritious food options (both 24%).

Overall, the national results show that the perceived opportunities of innovative foods are not uniform across the EU. Environmental benefits are particularly prominent in northern and western Member States, while in other countries citizens more often associate innovative foods with consumer choice, health, research and jobs, or food security.

QC6: Which of the following possible opportunities, if any, do you associate with innovative food products, ingredients or crops? (MAX. 2 ANSWERS) (%)



QC6: Which of the following possible opportunities, if any, do you associate with innovative food products, ingredients or crops? (MAX. 2 ANSWERS) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Reducing pressure on natural resources	27	33	23	20	48	32	23	24	25	24	27	20	25	14	19	23	35	27	25	46	25	14	31	16	24	24	43	51
Supporting food security	25	26	18	21	25	27	21	22	24	18	19	24	27	14	16	19	18	28	33	38	26	31	13	24	19	28	39	46
Improving consumer choice, with clear information and labelling	25	27	29	25	14	22	19	23	26	20	28	27	32	21	19	21	23	26	32	19	25	26	21	28	19	25	13	16
Supporting healthier or more nutritious food options	23	28	25	26	18	20	23	22	25	18	24	21	25	24	24	20	21	23	26	31	20	26	21	20	20	31	20	13
Creating new opportunities for research, innovation and jobs in Europe	21	21	22	21	30	15	20	21	29	27	15	28	25	23	21	22	15	29	27	16	24	23	13	25	19	27	23	26
Supporting farmers and food producers with new tools and options	20	24	18	16	19	18	17	20	23	17	20	25	21	24	16	14	17	24	26	23	22	20	15	23	16	19	20	21
Other (SPONTANEOUS)	1	0	0	1	1	1	0	0	0	1	1	1	1	0	1	1	1	0	1	0	2	0	1	2	2	1	0	1
None (SPONTANEOUS)	12	5	13	9	5	16	14	13	15	17	16	12	7	22	11	17	15	6	5	5	18	5	13	10	20	5	5	3
Don't know	6	2	9	6	10	6	11	11	3	6	8	3	5	6	14	9	4	4	4	2	3	6	16	3	5	3	4	1

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The **socio-demographic analysis** shows that perceived opportunities are more frequently mentioned by respondents who are younger, more educated, better informed, aware of the topic and positive towards innovative foods.

- There are no meaningful differences between men and women across the main opportunities;
- Differences by age are visible for some opportunities. Respondents aged 25-39 and 40-54 are more likely than those aged 55 and over to mention reducing pressure on natural resources (31% and 29% vs. 24%). Younger respondents aged 15-24 are more likely than average to associate innovative foods with healthier or more nutritious food options (28% vs. 23% EU average). Respondents aged 55 and over are the least likely to mention supporting food security (22%) and are more likely to say none (15% vs. 6% among the youngest);
- Education is associated with perceived opportunities. Respondents who completed their education at age 20 or later are more likely than those who left education at age 15 or earlier to mention reducing pressure on natural resources (33% vs. 18%) and supporting food security (28% vs. 18%). Those who left education earliest are also more likely to say none (17% vs. 9%);
- Differences are also observed by socio-professional category. Managers are the most likely to mention reducing pressure on natural resources (35%) and supporting food security (30%). Students are more likely than average to mention healthier or more nutritious food options (27%);
- Respondents living in large towns are more likely than those in rural areas or villages to mention reducing pressure on natural resources (31% vs. 25%). Other differences by urbanisation are limited;
- Familiarity with innovative foods is clearly linked to perceived opportunities. Respondents who feel well informed are more likely than those who do not feel well informed to mention supporting food security (30% vs. 23%), improving consumer choice through clear information and labelling (28% vs. 23%), and supporting farmers and food producers with new tools and options (24% vs. 18%);
- Prior awareness follows a similar pattern. Respondents who had heard of innovative foods before are more likely than those who had not heard of them to mention reducing pressure on natural resources (30% vs. 20%), supporting food security (28% vs. 18%), and creating new opportunities for research, innovation and jobs in Europe (23% vs. 15%). Those who had not heard of innovative foods are more likely to say none (21% vs. 8%);
- Attitudes towards innovative foods are also associated with perceived opportunities. Respondents with a positive view are more likely than those with a negative view to mention all proposed opportunities, particularly supporting food security (32% vs. 21%) and healthier or more nutritious food options (29% vs. 18%). In contrast, respondents with a negative view are much more likely to say none (20% vs. 1%).

QC6 Which of the following possible opportunities, if any, do you associate with innovative food products, ingredients or crops? (MAX. 2 ANSWERS) (% - EU)

	Reducing pressure on natural resources	Supporting food security	Improving consumer choice, with clear information and labelling	Supporting healthier or more nutritious food options	Creating new opportunities for research, innovation and jobs in Europe	Supporting farmers and food producers with new tools and options	Other (SPONTANEOUS)	None (SPONTANEOUS)	Don't know
EU27	27	25	25	23	21	20	1	12	6
Gender									
Man	28	25	24	23	22	20	1	12	5
Woman	27	25	25	23	20	20	1	12	6
Age									
15-24	27	25	24	28	24	20	0	6	7
25-39	31	27	26	23	23	21	1	8	5
40-54	29	28	24	23	22	19	1	11	4
55+	24	22	25	21	18	19	1	15	7
Education (End of)									
15-	18	18	25	20	17	18	1	17	11
16-19	24	24	26	21	20	20	1	13	6
20+	33	28	23	24	22	19	1	9	4
Still Studying	30	29	21	29	23	20	0	6	8
Socio-professional category									
Self-employed	27	25	25	23	22	20	1	12	4
Managers	35	30	24	24	24	19	1	9	3
Other white collars	29	29	28	22	23	20	1	8	4
Manual workers	26	23	25	23	21	21	0	10	5
House persons	22	21	23	21	17	19	1	17	7
Unemployed	30	25	23	23	20	17	1	12	6
Retired	23	22	24	21	16	19	1	17	8
Students	30	27	22	27	24	20	0	6	7
Subjective urbanisation									
Rural area or village	25	23	24	21	20	18	1	14	7
Small or middle sized town	27	26	25	23	20	20	1	11	6
Large town	31	26	26	24	23	20	1	10	4
Level of information about innovative foods									
Well informed	29	30	28	25	24	24	1	5	1
Not well informed	27	23	23	22	20	18	1	14	7
Prior awareness of innovative foods									
Have heard of	30	28	26	24	23	21	1	8	3
Have not heard of	20	18	22	20	15	16	1	21	12
Attitude towards innovative foods									
Positive	33	32	29	29	25	24	0	1	1
Negative	24	21	22	18	18	17	1	20	7

3. Food innovation in society

Information transparency is central to the acceptance of innovative foods.

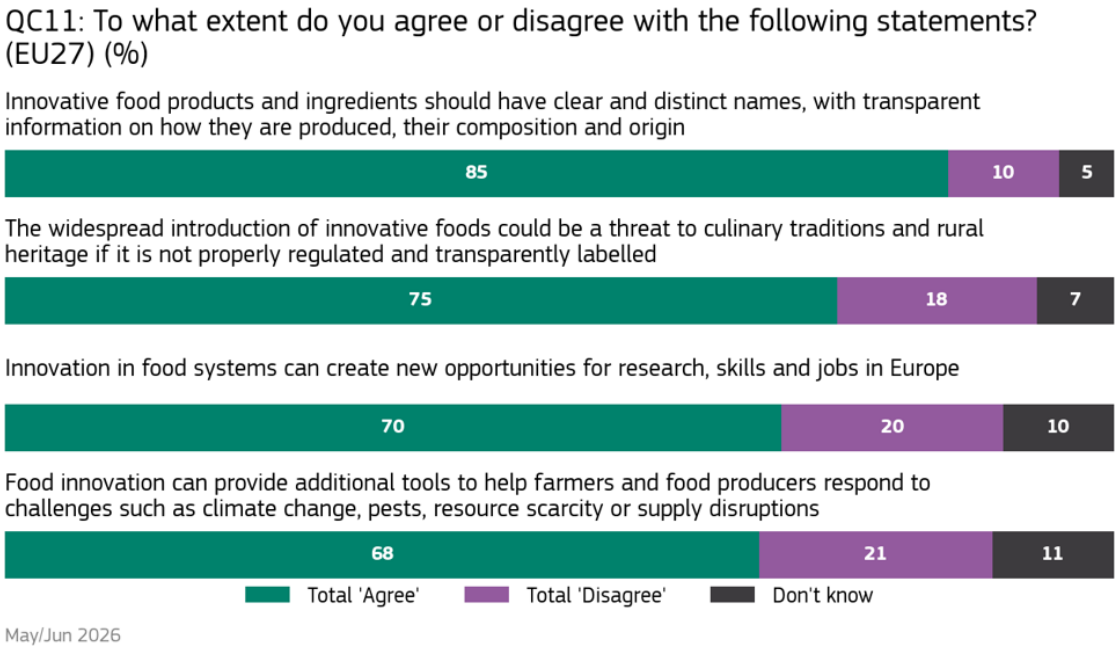
Beyond specific concerns and opportunities, Europeans were also asked whether they agree or disagree with a series of statements about the role of food innovation in society, agriculture and the economy[18]. The findings reveal strong support for transparency and broadly positive views regarding the potential contribution of food innovation, although many Europeans also recognise the importance of appropriate regulation.

At EU level, the strongest consensus concerns transparency and labelling. More than eight in ten respondents (85%) agree that **innovative food products and ingredients should have clear and distinct names**, with transparent information on how they are produced, their composition and origin, while only 10% disagree and 5% do not express an opinion.

Three quarters of Europeans agree that the **widespread introduction of innovative foods could be a threat to culinary traditions and rural heritage if it is not properly regulated and transparently labelled**. Fewer than one in five (18%) disagree with this statement, while 7% do not express an opinion.

There is also broad agreement regarding the economic benefits of food innovation. Seven in ten (70%) respondents agree that **innovation in food systems can create new opportunities for research, skills and jobs in Europe**, compared with 20% who disagree and 10% who do not express an opinion.

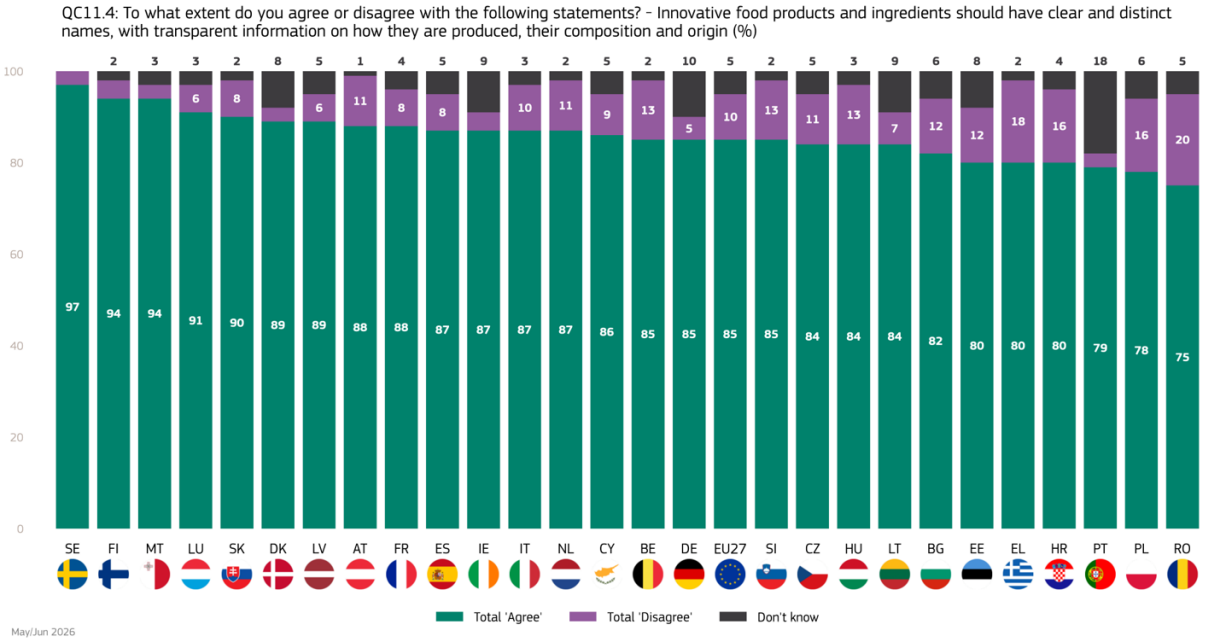
Similarly, more than two thirds of Europeans (68%) agree that **food innovation can provide additional tools to help farmers and food producers respond to challenges such as climate change**, pests, resource scarcity or supply disruptions, while 21% disagree and 11% do not express an opinion.



[18] QC11. To what extent do you agree or disagree with the following statements?

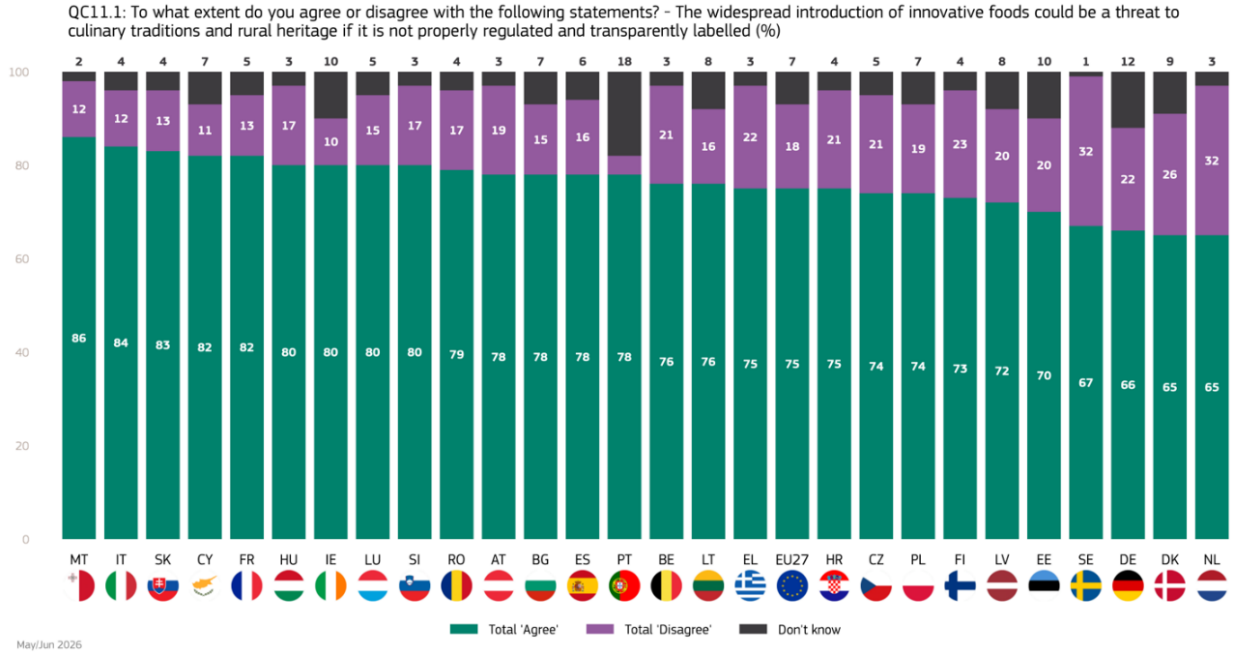
A **national analysis** reveals overwhelming support across the European Union for the view that innovative food products and ingredients should have clear and distinct names, together with transparent information on how they are produced, their composition and origin**.** Agreement exceeds three quarters of respondents in every Member State.

Support is highest in Sweden (97%), followed by Finland and Malta (both 94%), and Luxembourg (91%). At the other end of the scale, agreement is lowest in Romania (75%), followed by Poland (78%), Portugal (79%), and Estonia, Greece and Croatia (all 80%).



The strong support observed for transparent naming and labelling is also reflected in views on the broader societal implications of food innovation. A national analysis shows that, in every Member State, a clear majority agree that the widespread introduction of innovative foods could be a threat to culinary traditions and rural heritage if it is not properly regulated and transparently labelled.

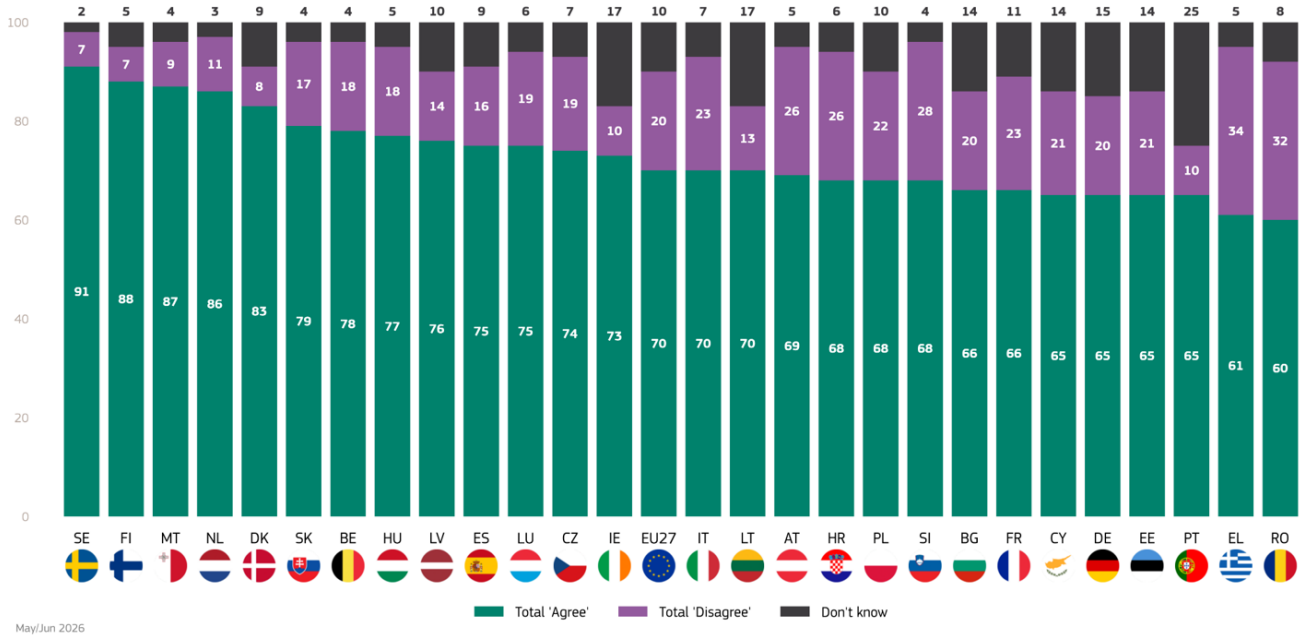
Agreement is highest in Malta (86%), followed by Italy (84%) and Slovakia (83%). At the other end of the scale, agreement is lowest in the Netherlands and Denmark (both 65%), followed by Germany (66%) and Sweden (67%).



Beyond concerns about potential risks and the need for safeguards, Europeans also recognise the broader economic benefits that food innovation may bring. A national analysis shows that in all Member States, at least six in ten agree that innovation in food systems can create new opportunities for research, skills and jobs in Europe.

Agreement is highest in Sweden (91%), followed by Finland (88%) and Malta (87%), while it is the lowest in Romania (60%), Greece (61%) and Portugal, Estonia, Germany and Cyprus (all 65%).

QC11.3: To what extent do you agree or disagree with the following statements? - Innovation in food systems can create new opportunities for research, skills and jobs in Europe (%)

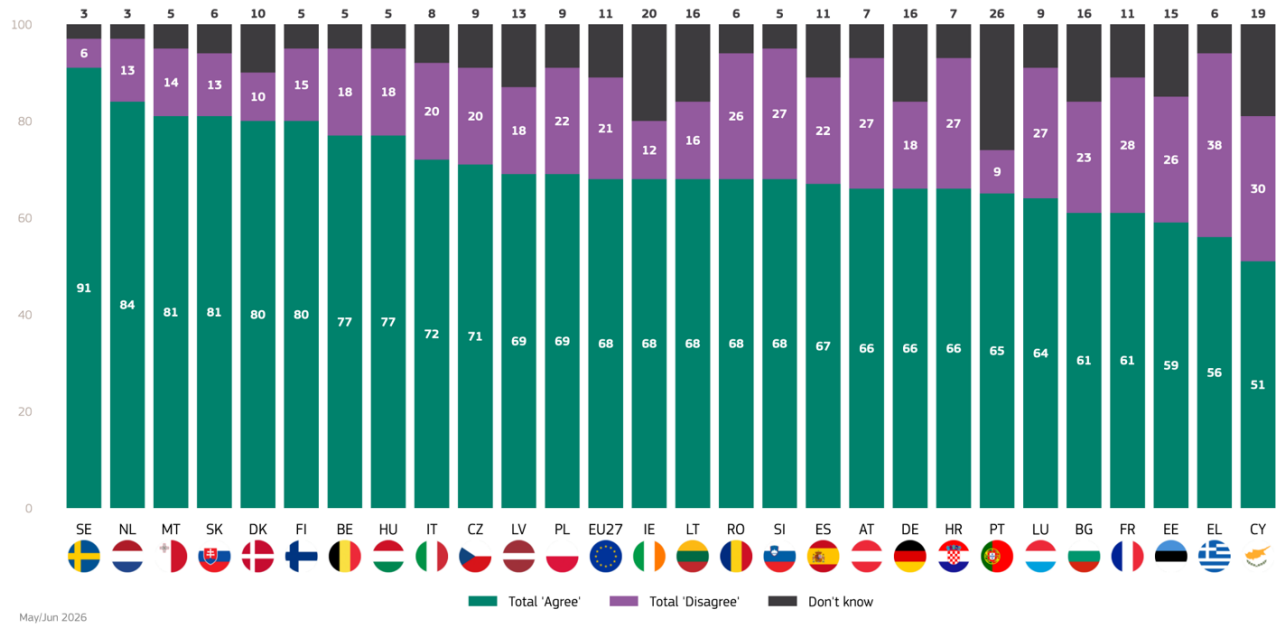


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In every Member State, at least half agree that food innovation can provide farmers and food producers with additional tools to address issues such as climate change, pests, resource scarcity and supply disruptions.

Agreement is highest in Sweden (91%), followed by the Netherlands (84%), Malta and Slovakia (both 81%). At the other end of the scale, agreement is lowest in Cyprus (51%), followed by Greece (56%) and Estonia (59%).

QC11.2: To what extent do you agree or disagree with the following statements? - Food innovation can provide additional tools to help farmers and food producers respond to challenges such as climate change, pests, resource scarcity or supply disruptions (%)



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The **socio-demographic analysis** reveals particularly strong differences in roles of innovation food in society according to education, socio-professional status, familiarity with innovative foods and overall attitudes towards the topic:

- There are no meaningful differences between men and women;
- Younger respondents are more likely to recognise the potential benefits of food innovation. Those aged 15-24 and 25-39 are more likely than respondents aged 55 and over to agree that innovation can create new opportunities for research, skills and jobs (76-77% vs. 64%) and help farmers respond to future challenges (both 75% vs. 63%);
- Education is associated with agreement. Respondents who completed their education at age 20 or later are more likely than those who left education at age 15 or earlier to agree that food innovation can create new opportunities for research, skills and jobs (77% vs. 56%) and provide additional tools for farmers and food producers (75% vs. 55%). They are also more likely to support transparent naming and labelling (89% vs. 78%);
- Differences are also observed across socio-professional categories. Managers are among the most likely to agree that food innovation can create opportunities for research, skills and jobs (78%) and support farmers and food producers (74%). Students are similarly positive, with 77% agreeing that innovation can create opportunities and 76% agreeing that it can help farmers respond to challenges;
- Respondents living in large towns are more likely than those living in rural areas or villages to agree that food innovation can create opportunities for research, skills and jobs (77% vs. 66%) and provide additional tools for farmers and food producers (74% vs. 65%). They are also slightly more likely to support transparent naming and labelling (88% vs. 83%);
- Respondents who feel well informed about innovative foods are more likely than those who do not feel well informed to agree that food innovation can create opportunities for research, skills and jobs (81% vs. 66%) and help farmers and food producers respond to challenges (83% vs. 63%). They are also more likely to support transparent naming and labelling (89% vs. 84%);
- Prior awareness shows a similar pattern. Respondents who had heard of innovative foods before the interview are consistently more likely to agree with each statement than those who had not previously heard of the topic. The difference is particularly pronounced for the view that food innovation can provide additional tools to help farmers and food producers respond to future challenges (76% vs. 53%);
- Attitudes towards innovative foods are the strongest differentiating factor. Respondents with a positive view of innovative foods are much more likely than those with a negative view to agree that innovation can create opportunities for research, skills and jobs (89% vs. 57%) and help farmers and food producers respond to challenges (90% vs. 54%). They are also more likely to support transparent naming and labelling (92% vs. 81%). By contrast, views on the potential threat to culinary traditions are similar among respondents with positive and negative attitudes (76% and 77%).

QC11 To what extent do you agree or disagree with the following statements?
Total 'Agree'
(% - EU)

	Innovative food products and ingredients should have clear and distinct names, with transparent information on how they are produced, their composition and origin	The widespread introduction of innovative foods could be a threat to culinary traditions and rural heritage if it is not properly regulated and transparently labelled	Innovation in food systems can create new opportunities for research, skills and jobs in Europe	Food innovation can provide additional tools to help farmers and food producers respond to challenges such as climate change, pests, resource scarcity or supply disruptions
EU27	85	75	70	68
Gender				
Man	85	75	72	69
Woman	86	76	69	68
Age				
15-24	87	76	77	75
25-39	86	74	76	75
40-54	86	77	73	70
55+	84	76	64	63
Education (End of)				
15-	78	74	56	55
16-19	84	77	67	66
20+	89	75	77	75
Still Studying	86	73	77	77
Socio-professional category				
Self-employed	88	79	73	71
Managers	90	73	78	74
Other white collars	86	75	74	74
Manual workers	84	78	70	69
House persons	79	74	61	64
Unemployed	89	77	74	72
Retired	83	75	61	60
Students	86	73	77	76
Subjective urbanisation				
Rural area or village	83	73	66	65
Small or middle sized town	86	76	69	69
Large town	88	77	77	74
Level of information about innovative foods				
Well informed	89	78	81	83
Not well informed	84	75	66	63
Prior awareness of innovative foods				
Have heard of	89	78	77	76
Have not heard of	78	72	56	53
Attitude towards innovative foods				
Positive	92	76	89	90
Negative	81	77	57	54



III. Building trust in innovative foods

1. Factors increasing confidence in innovative foods

Clear labelling and independent safety assessment are the main drivers of confidence in innovative foods.

Europeans were asked which measures would most increase their confidence about consuming innovative food products[19]. Respondents could select multiple answers, providing insight into the factors most likely to build trust and support acceptance of food innovation.

At EU level, the most frequently cited measure is **mandatory clear labelling detailing how the product was produced, its composition and origin**, selected by 51% of respondents. This is followed by **independent safety assessments beyond the producer's own data**[20] (38%), **approval by the European Food Safety Authority (EFSA)**[21] (36%) and **regular public reporting on safety findings** (34%). Finally, 16% say that none of the proposed measures would increase their confidence, while 3% do not express an opinion.

Overall, the findings suggest that transparency and independent verification are the most important drivers of confidence in innovative foods among Europeans.

A **national analysis** shows that mandatory clear labelling detailing how the product was produced, its composition and origin is the leading measure in 23 Member States. It is mentioned most frequently in Slovakia (59%), Malta (58%), Finland and the Netherlands (both 57%).

There are four exceptions where another measure ranks first. In Poland, safety assessments beyond the producer's own data findings is mentioned most frequently (36%), while in Sweden it's equally shared with mandatory clear labelling (both 60%). Approval by the European Food Safety Authority (EFSA) is the leading driver of confidence in Ireland (51%), while regular public reporting on safety findings is the most selected in Portugal (42%).

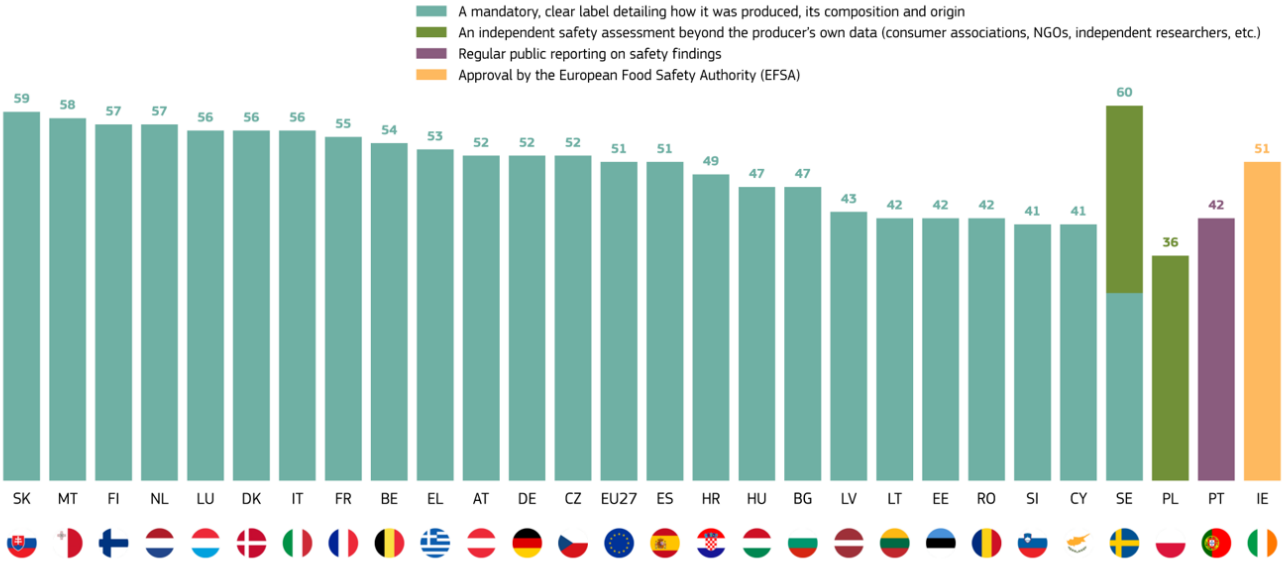
Although "nothing would make me more confident" is not the most frequently selected response in any Member State, it is mentioned by more than a quarter of respondents in Greece (29%), Slovenia (28%) and Cyprus (27%).

QC9: Which of the following would most increase your confidence about consuming innovative food products? (MULTIPLE ANSWERS POSSIBLE) (%)



[19] Which of the following would most increase your confidence about consuming innovative food products? (MULTIPLE ANSWERS POSSIBLE)
[20] Here, an independent safety assessment is understood as being different than EFSA's safety assessment
[21] Under the EU regulatory framework, EFSA conducts the scientific risk assessment, while authorisation is taken through the applicable EU risk-management procedure.

QC9: Which of the following would most increase your confidence about consuming innovative food products? (MULTIPLE ANSWERS POSSIBLE) (%)



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QC9: Which of the following would most increase your confidence about consuming innovative food products? (MULTIPLE ANSWERS POSSIBLE) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
A mandatory, clear label detailing how it was produced, its composition and origin	51	54	47	52	56	52	42	47	53	51	55	49	56	41	43	42	56	47	58	57	52	35	38	42	41	59	57	60
An independent safety assessment beyond the producer's own data (consumer associations, NGOs, independent researchers, etc.)	38	40	31	37	39	39	33	40	42	36	35	41	40	29	31	32	31	34	45	47	43	36	25	34	35	45	42	60
Approval by the European Food Safety Authority (EFSA)	36	40	32	35	50	40	30	51	45	37	32	35	36	40	25	28	39	35	49	53	38	27	18	27	31	41	44	58
Regular public reporting on safety findings	34	36	34	39	29	34	31	40	43	32	33	40	35	31	25	34	28	37	45	24	39	29	42	29	32	46	42	44
Other (SPONTANEOUS)	0	0	0	0	0	1	2	0	0	0	1	0	0	0	1	0	1	1	0	0	3	0	1	1	0	1	0	0
None, nothing would make you more confident about consuming innovative food (SPONTANEOUS)	16	8	20	13	8	19	18	13	29	17	22	18	9	27	17	24	19	20	13	6	22	12	24	16	28	7	7	4
Don't know	3	1	3	3	6	2	8	5	1	3	4	2	2	5	8	5	1	2	3	1	1	5	12	2	1	1	3	1

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The **socio-demographic analysis** shows that proposed measures are more frequently selected by respondents who are younger, more educated, urban, familiar with innovative foods and positive towards them.

- There are no meaningful differences between men and women. Both are equally likely to mention mandatory clear labelling (50% of men vs. 52% of women), independent safety assessments (39% vs. 37%), EFSA approval (37% vs. 36%) and regular public reporting on safety findings (34% vs. 33%);
- Differences by age are visible across most measures. Respondents aged 25-39 are the most likely to mention mandatory clear labelling (54%), independent safety assessments (42%), while those aged 15-24 are the most likely to cite EFSA approval (41%). Respondents aged 55 and over are more likely to say that none of the proposed measures would increase their confidence (21% vs. 16% EU average);
- Respondents who completed their education at age 20 or later are more likely to mention mandatory clear labelling (55% vs. 43% of those who left education at age 15 or earlier), independent safety assessments (43% vs. 29%), EFSA recommendation (41% vs. 28%) and regular reporting on safety findings (36% vs. 28%). Those who left education earlier are more likely to say none (25% vs. 11%);
- Differences are also observed across socio-professional categories. Managers are the most likely to mention mandatory clear labelling (56%), independent safety assessments (45%) and EFSA approval (44%). Students are also among the most likely to select EFSA approval (42%) and regular public reporting on safety findings (37%).
- Respondents living in large towns are more likely than those living in rural areas or villages to mention mandatory clear labelling (55% vs. 48%), independent safety assessments (41% vs. 36%), EFSA approval (40% vs. 32%) and regular public reporting on safety findings (38% vs. 32%). Rural respondents are more likely to indicate that none of the proposed measures would increase their confidence (20% vs. 12%);
- Familiarity with innovative foods is associated with greater confidence in some measures. Respondents who feel well informed are slightly more likely than those who do not feel well informed to mention independent safety assessments (41% vs. 37%) and EFSA approval (41% vs. 35%). Those who do not feel well informed are more likely to say none (19% vs. 7%);
- Prior awareness follows a similar pattern. Respondents who had heard of innovative foods before the interview are more likely than those who had not heard of them to mention mandatory clear labelling (54% vs. 44%), independent safety assessments (42% vs. 30%), EFSA approval (40% vs. 29%) and regular public reporting on safety findings (37% vs. 28%). Those who had not heard of innovative foods are much more likely to say none (29% vs. 10%);
- Attitudes towards innovative foods are strongly linked with proposed measures. Respondents with a positive view are more likely than those with a negative view to select mandatory clear labelling (58% vs. 45%), independent safety assessments (46% vs. 33%), EFSA approval (46% vs. 30%) and regular public reporting on safety findings (40% vs. 30%). Respondents with a negative view are substantially more likely to say none of the proposed measures would increase their confidence (27% vs. 2%);
- Willingness to buy innovative foods is the strongest differentiating factor. Respondents with high willingness to buy are considerably more likely than those with low willingness to mention mandatory clear labelling (61% vs. 44%), independent safety assessments (48% vs. 31%), EFSA approval (49% vs. 27%) and regular public reporting on safety findings (42% vs. 28%). By contrast, respondents with low willingness to buy are far more likely to say none (28% vs. 1%).

QC9 Which of the following would most increase your confidence about consuming innovative food products? (MULTIPLE ANSWERS POSSIBLE)
(% - EU)

	A mandatory, clear label detailing how it was produced, its composition and origin	An independent safety assessment beyond the producer's own data (consumer associations, NGOs, independent researchers, etc.)	Approval by the European Food Safety Authority (EFSA)	Regular public reporting on safety findings	Other (SPONTANEOUS)	None, nothing would make you more confident about consuming innovative food (SPONTANEOUS)	Don't know
EU27	51	38	36	34	0	16	3
Gender							
Man	50	39	37	34	0	16	3
Woman	52	37	36	33	0	16	3
Age							
15-24	51	40	41	37	1	10	5
25-39	54	42	40	37	1	11	2
40-54	52	40	38	36	0	14	2
55+	48	34	33	30	0	21	4
Education (End of)							
15-	43	29	28	28	0	25	6
16-19	50	37	34	34	1	18	3
20+	55	43	41	36	0	11	2
Still Studying	51	40	43	38	1	11	5
Socio-professional category							
Self-employed	51	40	35	34	0	16	3
Managers	56	45	44	37	0	10	2
Other white collars	51	42	40	36	1	13	2
Manual workers	52	37	35	35	1	15	2
House persons	45	31	29	32	0	17	3
Unemployed	53	36	34	32	0	16	5
Retired	47	33	32	29	0	23	4
Students	53	41	42	37	1	9	5
Subjective urbanisation							
Rural area or village	48	36	32	32	1	20	3
Small or middle sized town	51	38	37	33	0	16	3
Large town	55	41	40	38	0	12	3
Level of information about innovative foods							
Well informed	53	41	41	38	0	7	1
Not well informed	50	37	35	33	0	19	3
Prior awareness of innovative foods							
Have heard of	54	42	40	37	0	10	2
Have not heard of	44	30	29	28	0	29	5
Attitude towards innovative foods							
Positive	58	46	46	40	0	2	1
Negative	45	33	30	30	0	27	3
Willingness to buy innovative foods							
High	61	48	49	42	0	1	1
Low	44	31	27	28	1	28	3

2. Trusted sources of information about innovative foods

Trusted information about innovative foods is most likely to come from a national food safety authority and health professionals.

Europeans were asked which sources of information they would use to obtain trustworthy information about the safety and environmental impact of innovative foods[22]. Respondents could select up to three sources, providing insight into the institutions and actors they trust most when seeking information about food innovation.

At EU level, the most frequently cited source is **a national food safety authority[23]**, mentioned by 36% of respondents. This is closely followed by **health professionals** (35%) and **independent scientists and academia** (32%). Around one quarter mention **consumer organisations and NGOs** (27%), **EFSA** (26%) and **traditional farmers** (26%). Only 13% would rely on the food industry, while 7% do not know which source they would trust.

Overall, the findings suggest that Europeans place the greatest trust in public authorities, health experts and independent scientific sources when seeking information about innovative foods.

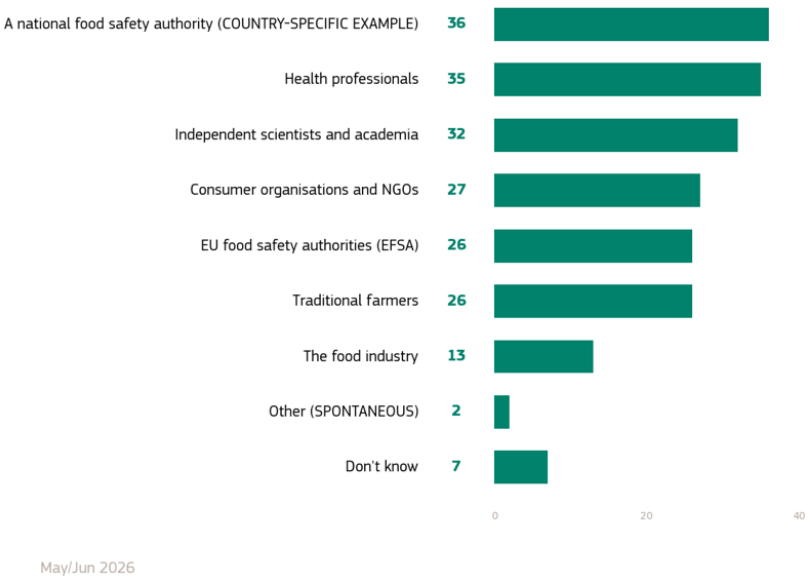
A **national analysis** shows that the preferred sources of trustworthy information vary considerably across Member States, although public authorities, health professionals and independent scientists dominate in most countries.

A national food safety authority is the most frequently mentioned source in 12 Member States, with the highest proportions recorded in Sweden (73%), the Netherlands (62%) and Denmark (61%).

Health professionals are the leading source in 11 Member States. They are mentioned most often in Portugal (61%), Malta (58%) and Greece (53%),

Independent scientists and academia are the most frequently mentioned source in Finland (61%), Estonia (39%) and Germany (36%). In Romania, the leading source is traditional farmers (30%), making it the only Member State where this source ranks first.

QC12: Which of the following sources of information would you use in order to get trustworthy information about the safety and environmental impact of innovative foods? (MAX. 3 ANSWERS) (%)



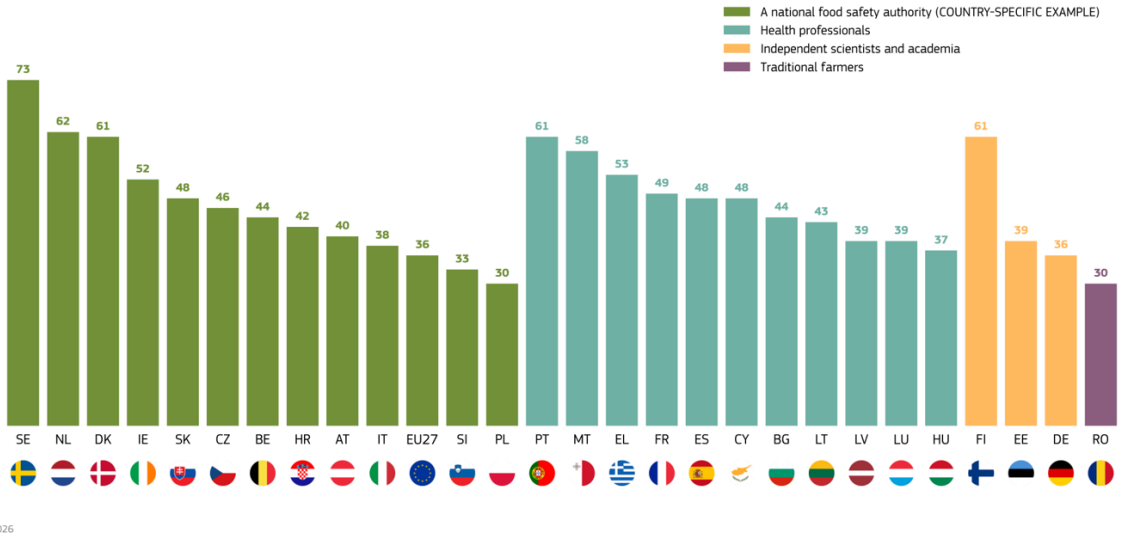
[22] QC12. Which of the following sources of information would you use in order to get trustworthy information about the safety and environmental impact of innovative foods? (MAX. 3 ANSWERS)

[23] The exact name of each national authority was given to the respondent.

Consumer organisations and NGOs are not the leading source in any Member State, but they are mentioned relatively often in Sweden (39%), France (36%), Germany and Luxembourg (both 34%).

The EU food safety authority (EFSA) is also not the leading source in any Member State but are cited by relatively high proportions in Sweden (44%), the Netherlands (43%), and Ireland (41%).

QC12: Which of the following sources of information would you use in order to get trustworthy information about the safety and environmental impact of innovative foods? (MAX. 3 ANSWERS) (%)



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QC12: Which of the following sources of information would you use in order to get trustworthy information about the safety and environmental impact of innovative foods? (MAX. 3 ANSWERS) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
A national food safety authority (COUNTRY-SPECIFIC EXAMPLE)	36	44	29	46	61	33	30	52	39	34	26	42	38	23	31	24	37	31	33	62	40	30	22	29	33	48	59	73
Health professionals	35	27	44	27	38	34	27	37	53	48	49	34	24	48	39	43	39	37	58	15	38	25	61	27	22	30	32	22
Independent scientists and academia	32	37	27	25	37	36	39	25	37	26	27	31	30	24	29	31	28	30	33	50	31	29	26	23	26	38	61	61
Consumer organisations and NGOs	27	28	17	19	31	34	22	17	15	18	36	28	30	14	19	19	34	30	31	33	32	23	14	13	19	26	13	39
EU food safety authorities (EFSA)	26	33	28	22	34	23	22	41	31	33	16	29	29	27	18	24	35	23	34	43	27	22	24	20	25	34	39	44
Traditional farmers	26	28	31	28	11	24	18	23	38	22	30	30	28	26	24	17	29	33	33	20	38	26	22	30	28	30	14	15
The food industry	13	13	16	21	14	7	12	13	25	8	10	22	19	16	10	9	4	21	14	8	19	14	13	22	10	23	10	7
Other (SPONTANEOUS)	2	1	2	2	2	5	7	1	2	1	3	1	2	4	2	2	3	1	1	2	5	0	2	4	7	1	1	0
Don't know	7	3	10	9	5	10	11	6	2	8	9	5	6	8	8	11	2	5	3	3	5	7	15	7	9	1	3	1

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The **socio-demographic analysis** shows that trust in information sources is most strongly associated with education, familiarity with innovative foods, attitudes towards them and willingness to purchase innovative foods.

- There are no substantial differences between men and women in their choice of trusted information sources;
- Differences by age are relatively modest. Respondents aged 15-24 are more likely than the EU average to trust health professionals (39% vs. 35%) and EFSA (32% vs. 26%), while those aged 55 and over are more likely to trust farmers (28% vs. 23% among the youngest). Finally, respondents aged 25-39 trust more a national food authority (40% vs. 33% of those aged 55+) and independent scientists (35% vs. 30% among youngest and oldest age groups);
- Education is strongly associated with trust in scientific and institutional sources. Respondents who completed their education at age 20 or later are much more likely to mention national food safety authorities (41% vs. 27% of those who left education at age 15 or earlier), independent scientists and academics (40% vs. 21%), consumer organisations (32% vs. 20%) and EFSA (30% vs. 18%). Those who left education earlier are more likely to trust health professionals (40% vs. 35%) and traditional farmers (30% vs. 23%);
- Differences are also observed across socio-professional categories. Managers are the most likely to trust national food safety authorities than EU average (42% vs. 36%), independent scientists and academics (42% vs. 32%) and EFSA (33% vs. 26%), while unemployed respondents are the most likely to mention health professionals (45% vs. 35%);
- Respondents living in large towns are more likely than those living in rural areas or villages to trust all sources except for traditional farmers which are slightly more trusted by rural respondents (30% vs. 24%);
- Familiarity with innovative foods is linked to greater trust in scientific and regulatory sources. Respondents who feel well informed are more likely than those who do not feel well informed to mention independent scientists and academics (37% vs. 30%) and EFSA (31% vs. 25%). Those who do not feel well informed are more likely to choose health professionals (37% vs. 31%);
- Prior awareness follows a similar pattern. Respondents who had heard of innovative foods are considerably more likely than those who had not heard of them to mention national food safety authorities (39% vs. 29%), independent scientists and academics (36% vs. 23%), consumer organisations (30% vs. 22%) and EFSA (29% vs. 20%);
- Attitudes towards innovative foods are closely linked to trusted information sources. Respondents with a positive view are more likely than those with a negative view to trust national food safety authorities (44% vs. 31%), independent scientists and academics (37% vs. 29%), consumer organisations (30% vs. 25%) and EFSA (36% vs. 20%);
- Respondents with high willingness to buy are substantially more likely to trust national food safety authorities (45% vs. 30%), independent scientists and academics (38% vs. 28%), consumer organisations (33% vs. 24%) and EFSA (36% vs. 20%). By contrast, respondents with low willingness to buy are much more likely to select traditional farmers (29% vs. 23%).

QC12 Which of the following sources of information would you use in order to get trustworthy information about the safety and environmental impact of innovative foods? (MAX. 3 ANSWERS)
(% - EU)

	A national food safety authority (COUNTRY-SPECIFIC EXAMPLE)	Health professionals	Independent scientists and academia	Consumer organisations and NGOs	EU food safety authorities (EFSA)	Traditional farmers	The food industry	Other (SPONTANEOUS)	Don't know
EU27	36	35	32	27	26	26	13	2	7
Gender									
Man	36	34	33	27	27	26	13	3	7
Woman	36	36	31	28	26	27	12	2	8
Age									
15-24	35	39	30	25	32	23	14	2	8
25-39	40	35	35	28	30	25	14	2	6
40-54	38	34	34	29	28	26	12	2	5
55+	33	35	30	27	22	28	12	3	9
Education (End of)									
15-	27	40	21	20	18	30	12	2	13
16-19	35	35	28	25	24	29	14	3	8
20+	41	35	40	32	30	23	11	2	4
Still Studying	33	38	35	27	34	20	14	3	9
Socio-professional category									
Self-employed	35	30	38	28	30	27	13	2	5
Managers	42	32	42	35	33	22	12	2	4
Other white collars	41	33	33	29	27	26	13	2	6
Manual workers	34	37	29	25	26	29	14	3	7
House persons	33	38	27	19	18	27	17	1	10
Unemployed	30	45	28	26	26	28	13	2	8
Retired	33	35	29	27	21	28	11	3	10
Students	37	39	33	27	34	20	13	2	7
Subjective urbanisation									
Rural area or village	33	32	29	25	24	30	13	3	9
Small or middle sized town	36	36	32	28	26	25	12	3	7
Large town	40	37	36	29	30	24	14	2	5
Level of information about innovative foods									
Well informed	39	31	37	29	31	28	16	2	2
Not well informed	35	37	30	27	25	26	12	3	9
Prior awareness of innovative foods									
Have heard of	39	35	36	30	29	27	14	2	3
Have not heard of	29	38	23	22	20	26	11	4	16
Attitude towards innovative foods									
Positive	44	33	37	30	36	25	17	1	1
Negative	31	36	29	25	20	28	11	4	10
Willingness to buy innovative foods									
High	45	35	38	33	36	23	15	1	1
Low	30	36	28	24	20	29	11	4	10



IV. Consumer adoption and trade-offs

1. Influence of product naming and wording

Europeans appear most receptive to terms that are perceived as neutral or familiar, such as "cultivated" and "animal-free".

Having explored the factors that can build confidence in innovative foods and the sources Europeans trust most for information, the survey then examined how different terms used to describe innovative food products influence consumers' willingness to try them. Respondents were presented with a list of terms that might appear on a new food product and asked which would make them most willing to try it[24].

At EU level, "**cultivated**" is the most appealing term, selected by 28% of respondents. It is followed by **"animal-free"** (25%) and **"alternative proteins"**[25] (21%).

A second group of terms attracts more moderate levels of support. Around one in six Europeans select "**made using fermentation**" (17%) or **"advanced fermentation**" (17%), while **"precision-bred**" is mentioned by 15%.

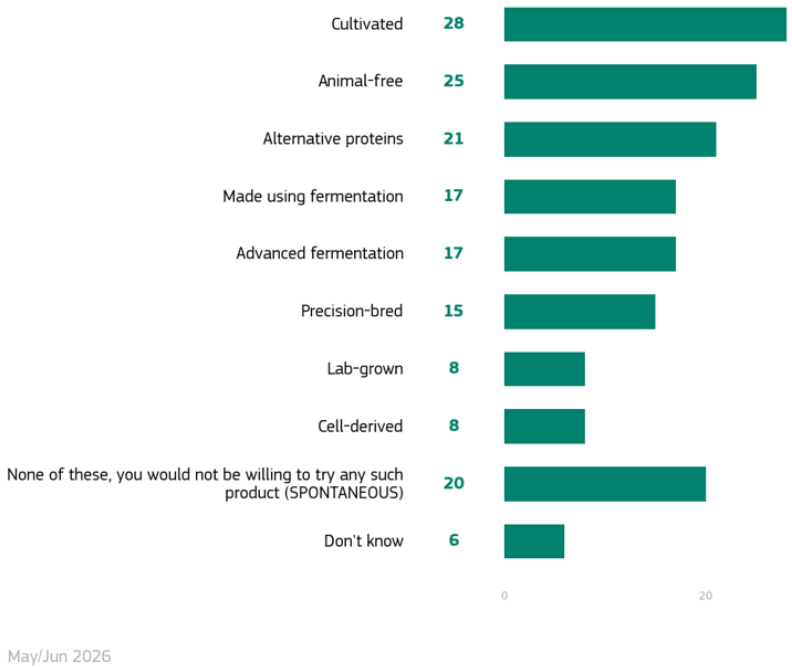
The least appealing terms are **"lab-grown**" and "**cell-derived**", each selected by only 8% of respondents.

Notably, one in five Europeans (20%) spontaneously say that *none of these terms would make them willing to try such a product*, while 6% do not express an opinion.

A **national analysis** shows that preferences for different terms vary considerably across Member States. "Cultivated" is the leading term in 10 Member States. It is mentioned most often in Sweden (53%), followed by Finland (43%), and Greece (41%), while in Bulgaria it's equally shared with the option 'none' (both 24%).

"Animal-free" is the most frequently selected term in the Netherlands (44%), Austria (33%) and Germany (31%), and is jointly first in Ireland together with 'alternative proteins' (both 30%).

QC7: Here is a list of terms that might appear on a new food product (innovative food). Which term would make you most willing to try it? (MAX. 3 ANSWERS) (%)

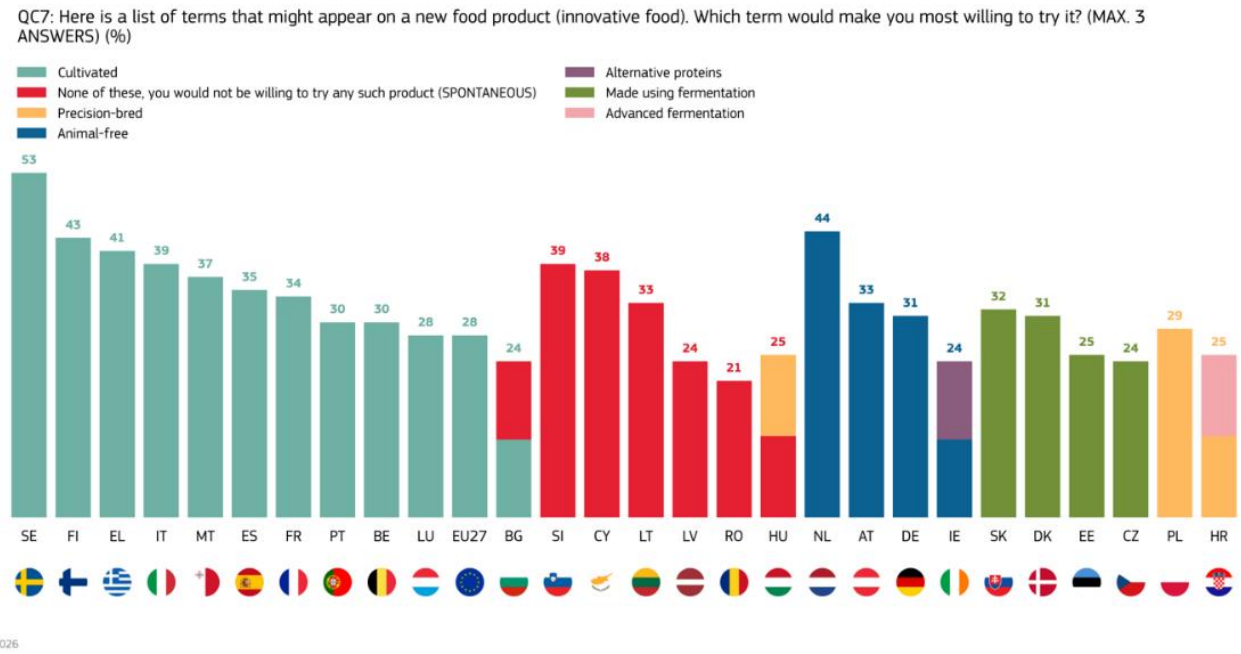


[24] QC7. Here is a list of terms that might appear on a new food product (innovative food). Which term would make you most willing to try it? (MAX. 3 ANSWERS)

[25] Alternative protein is understood under Food 2030 as "alternative to animal-based proteins".

"Made using fermentation" is the leading term in Slovakia (32%), Denmark (31%), Estonia (25%) and Czechia (24%). In Poland, "precision-bred" is the most frequently selected term (29%), while in Croatia, it's equally shared with "advanced fermentation" (both 25%), and in Hungary with 'none of these' (both 25%).

Finally, rather than favouring any particular term, respondents in five Member States, specifically in Slovenia (39%), Cyprus (38%), Lithuania (33%), Latvia (24%) and Romania (21%) most often say that none of the proposed terms would make them willing to try such a product.



QC7: Here is a list of terms that might appear on a new food product (innovative food). Which term would make you most willing to try it? (MAX. 3 ANSWERS) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Cultivated	28	30	24	11	30	25	9	23	41	35	34	14	39	37	10	5	28	10	37	29	17	13	30	10	18	12	43	53
Animal free	25	29	15	18	21	31	16	24	32	20	25	22	27	14	14	13	23	20	27	44	33	18	12	15	10	20	27	28
Alternative proteins	21	28	17	20	28	24	19	24	17	20	18	16	21	9	14	11	23	19	26	32	24	10	25	17	13	19	31	27
Made using fermentation	17	21	18	24	31	20	25	17	16	10	15	20	11	7	22	21	22	21	16	31	26	15	6	20	20	32	25	38
Advanced fermentation	17	18	18	19	20	19	17	16	12	10	11	25	16	4	19	17	10	22	20	24	19	24	5	20	17	25	12	25
Precision-bred	15	13	19	19	14	10	13	14	15	10	7	25	22	4	19	14	7	25	23	15	12	29	8	20	14	26	10	20
Lab-grown	8	9	9	5	10	5	9	4	10	7	8	11	12	5	7	8	6	9	12	9	8	9	6	11	5	12	5	12
Cell-derived	8	10	7	8	9	9	9	4	8	6	8	9	8	4	4	8	6	13	7	7	12	12	2	9	3	10	5	6
None of these, you would not be willing to try any such product (SPONTANEOUS)	20	15	24	16	14	24	23	21	32	25	26	21	11	38	24	33	26	25	18	9	27	15	27	21	39	13	15	5
Don't know	6	2	8	9	9	4	13	13	2	8	8	6	6	6	12	12	5	6	6	3	2	10	14	8	2	7	4	2

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The **socio-demographic analysis** shows that preferences for product naming are primarily associated with age, education, familiarity with innovative foods and overall attitudes towards them

- There are no meaningful differences between men and women;
- Younger respondents are generally more receptive to the proposed terminology. Respondents aged 15-24 and 25-39 are more likely than those aged 55 and over to select animal-free (31% and 29% vs. 21%) and alternative proteins (28% and 27% vs. 15%). By contrast, respondents aged 55 and over are considerably more likely to say that none of the proposed terms would make them willing to try such a product (28% vs. 12% among those aged 15-24);
- Education is associated with greater acceptance of innovative food terminology. Respondents who completed their education at age 20 or later are more likely to select most of the proposed terms, while those who left education at age 15 or earlier are much more likely to reject all options (33% vs. 16%);
- Differences by socio-professional category are generally modest, however students and managers are considerably less likely than other socio-professional groups to reject all proposed product descriptions (11% and 14% vs. 16-30%);
- Respondents living in large towns are more likely than those living in rural areas or villages to select animal-free (30% vs. 21%) and are less likely to reject all proposed terms (16% vs. 24%);
- Familiarity with innovative foods is closely linked to receptiveness to product descriptions. Respondents who feel well informed about innovative foods are more likely to select fermentation-related terms, including using fermentation (23% vs. 15%) and advanced fermentation (24% vs. 14%) as well as precision-bred (22% vs. 12%). They are also much less likely to reject all proposed terms (9% vs. 25%);
- Prior awareness shows a similar pattern. Respondents who had heard of innovative foods are more likely than those who had not to select cultivated (30% vs. 22%), animal-free (28% vs. 18%) and alternative proteins (23% vs. 14%) as well as fermentation-related items. Conversely, those without prior awareness are much more likely to say that none of the proposed terms would encourage them to try the product (35% vs. 14%);
- Respondents with a positive attitude towards innovative foods are around twice as likely as those with a negative view to select terms such as alternative proteins (30% vs. 14%) and advanced fermentation (25% vs. 11%). Conversely, those with negative views are more likely to reject all proposed terms (34% vs. 4%);
- Respondents with high willingness to buy are substantially more likely than those with low willingness to select all proposed terms. Only 2% say that none of the proposed terms would encourage them to try the product, compared with 35% among those with low willingness to buy.

QC7 Here is a list of terms that might appear on a new food product (innovative food). Which term would make you most willing to try it? (MAX. 3 ANSWERS)

	Cultivated	Animal-free	Alternative proteins	Made using fermentation	Advanced fermentation	Precision-bred	Lab-grown	Cell-derived	None of these, you would not be willing to try any such product (SPONTANEOUS)	Don't know
EU27	28	25	21	17	17	15	8	8	20	6
Gender										
Man	28	24	21	17	17	16	9	9	21	6
Woman	28	26	21	17	16	14	7	7	20	7
Age										
15-24	31	31	28	17	18	15	10	10	12	6
25-39	30	29	27	20	20	18	10	10	14	5
40-54	28	25	21	19	18	16	8	8	18	6
55+	26	21	15	15	14	12	6	7	28	8
Education (End of)										
15-	30	17	10	9	8	10	6	4	33	10
16-19	26	23	19	16	16	15	8	9	23	7
20+	29	29	23	22	19	15	8	8	16	5
Still Studying	32	32	30	19	18	15	9	11	11	6
Socio-professional category										
Self-employed	27	23	22	19	19	18	10	7	18	6
Managers	29	30	24	24	22	18	9	8	14	3
Other white collars	29	27	25	18	18	17	9	10	16	6
Manual workers	27	23	20	17	17	16	8	9	21	6
House persons	26	24	16	11	11	12	7	7	24	11
Unemployed	32	28	19	18	16	13	11	10	20	5
Retired	26	20	13	14	12	11	6	6	30	9
Students	32	33	30	19	18	15	9	10	11	6
Subjective urbanisation										
Rural area or village	26	21	18	16	17	15	7	7	24	7
Small or middle sized town	29	24	21	17	16	15	9	8	20	7
Large town	29	30	22	20	18	15	9	10	16	6
Level of information about innovative foods										
Well informed	30	28	25	23	24	22	11	13	9	3
Not well informed	27	24	19	15	14	12	7	6	25	7
Prior awareness of innovative foods										
Have heard of	30	28	23	20	20	17	9	10	14	5
Have not heard of	22	18	14	11	9	9	5	5	35	10
Attitude towards innovative foods										
Positive	32	32	30	24	25	24	12	13	4	3
Negative	26	20	14	13	11	9	6	5	34	6
Willingness to buy innovative foods										
High	33	35	32	24	25	23	11	13	2	3
Low	25	18	12	13	11	9	6	5	35	7

2. Willingness to purchase innovative foods

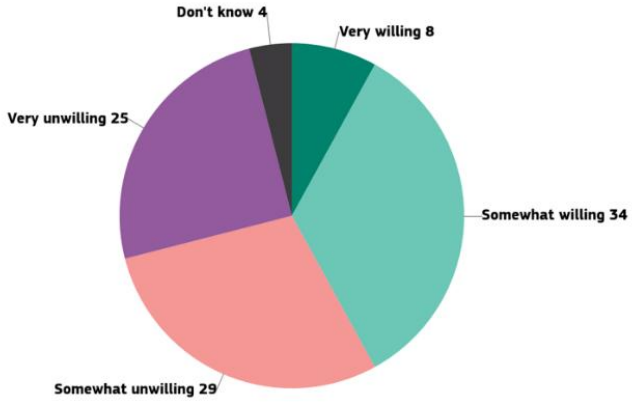
Most Europeans remain hesitant to buy a specific type of innovative food product, even when it meets EU safety standards and is clearly labelled.

The survey also explored Europeans' willingness to purchase a specific type of innovative food ingredient. Respondents were asked whether they would be willing to buy a food product containing an ingredient produced using micro-organisms, for example albumin proteins, provided that it met EU safety standards and was clearly labelled[26].

At EU level, 42% of Europeans say they would be *willing* to buy such a product, including 34% who are *somewhat willing* and 8% who are *very willing*. By contrast, a majority (54%) say they would be *unwilling* to do so, comprising 29% who are *somewhat unwilling* and 25% who are *very unwilling*. A further 4% do not express an opinion.

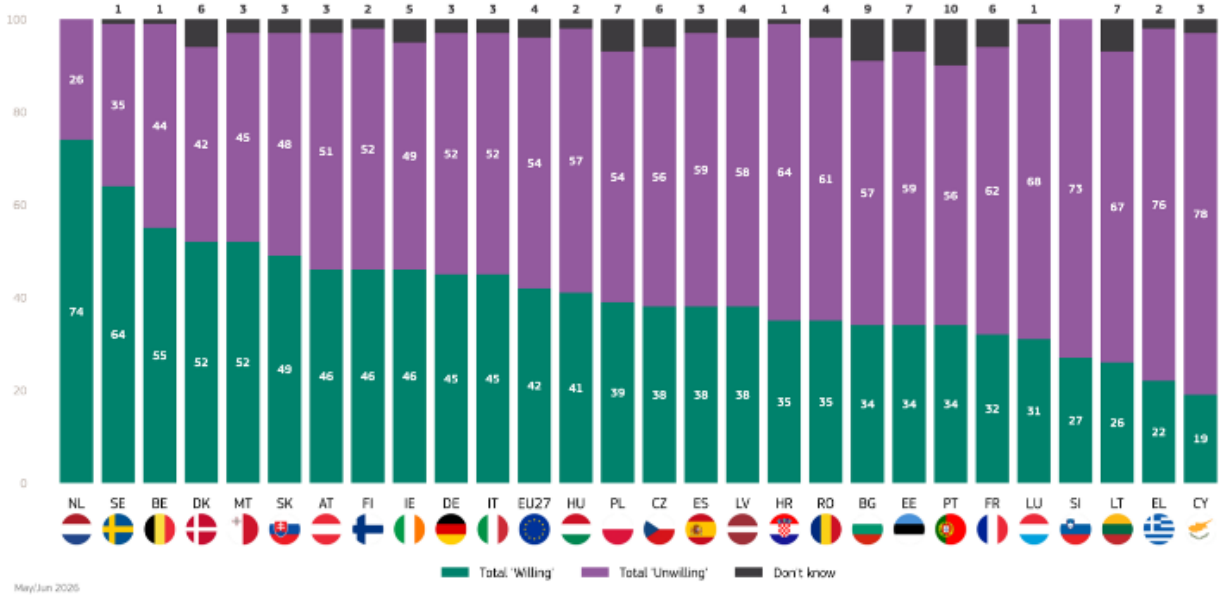
A **national analysis** reveals considerable variation across Member States in willingness to buy a food product containing an ingredient produced using micro-organisms. In five Member States, respondents are more likely to be willing than unwilling to buy such a product. Willingness is highest in the Netherlands (74%), followed by Sweden (64%) and Belgium (55%). Relative majorities are also recorded in Denmark and Malta (both 52%). At the other end of the scale, willingness is lowest in Cyprus (19%), Greece (22%) and Lithuania (26%).

QC8a: Imagine a food ingredient produced using micro-organisms, for example a protein identical to those found in eggs but made without using animals. If it met EU safety standards and was clearly labelled, how willing would you be to buy a food product containing this ingredient? (EU27) (%)



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QC8a: Imagine a food ingredient produced using micro-organisms, for example a protein identical to those found in eggs but made without using animals. If it met EU safety standards and was clearly labelled, how willing would you be to buy a food product containing this ingredient? (%)

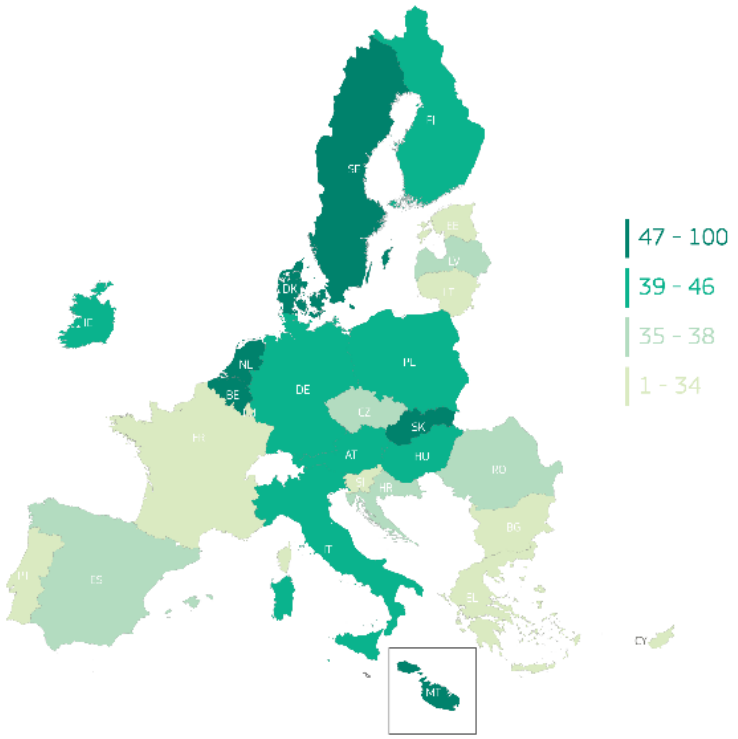


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[26] QC8a. Imagine a food ingredient produced using micro-organisms, for example a protein identical to those found in eggs but made without using animals. If it met EU safety standards and was clearly labelled, how willing would you be to buy a food product containing this ingredient?

QC8a: Imagine a food ingredient produced using micro-organisms, for example a protein identical to those found in eggs but made without using animals. If it met EU safety standards and was clearly labelled, how willing would you be to buy a food product containing this ingredient? - Total 'Willing' (EU27) (%)

NL	74
SE	64
BE	55
MT	52
DK	52
SK	49
FI	46
IE	46
AT	46
IT	45
DE	45
EU27	42
HU	41
PL	39
CZ	38
LV	38
ES	38
HR	35
RO	35
EE	34
PT	34
BG	34
FR	32
LU	31
SI	27
LT	26
EL	22
CY	19



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The **socio-demographic analysis** shows that willingness to purchase innovative foods produced using micro-organisms is strongly associated with age, education, familiarity with innovative foods and attitudes towards them.

- There are no meaningful differences between men and women;
- Respondents aged 15-24 (55%) and 25-39 (52%) are more likely than the EU average (42%) to be willing to buy these products, while those aged 55 and over are considerably less likely to do so (31%);
- Education is strongly associated with willingness to purchase. Respondents who completed their education at age 20 or later are more than twice as likely to be willing to buy these products (50% vs. 22% of those who left education at age 15 or earlier);
- Differences are also observed across socio-professional categories. Students (58%) and managers (54%) are among the most willing to purchase the product, while retired respondents are notably less likely to do so (28%);
- Respondents living in large towns are more likely than those living in rural areas or villages to express willingness to purchase the product (49% vs. 36%);
- Familiarity with innovative foods is closely linked to willingness to purchase. Respondents who feel well informed are twice as likely as those who do not feel well informed to be willing to buy these products (66% vs. 33%);
- Prior awareness follows a similar pattern. Half of respondents who had heard of innovative foods before the interview would be willing to buy these products, compared with just 22% among those who had not heard of them;
- Attitudes towards innovative foods are also a differentiating factor. More than three quarters (76%) of respondents with a positive view of innovative foods would be willing to buy the product, compared with just 18% of those with a negative view.

QC8a Imagine a food ingredient produced using micro-organisms, for example a protein identical to those found in eggs but made without using animals. If it met EU safety standards and was clearly labelled, how willing would you be to buy a food product containing this ingredient?
(% - EU)

	Total 'Willing'	Total 'Unwilling'	Don't know
EU27	42	54	4
Gender			
Man	42	54	4
Woman	41	55	4
Age			
15-24	55	40	5
25-39	52	45	3
40-54	44	52	4
55+	31	65	4
Education (End of)			
15-	22	73	5
16-19	37	59	4
20+	50	47	3
Still Studying	56	39	5
Socio-professional category			
Self-employed	42	55	3
Managers	54	42	4
Other white collars	47	50	3
Manual workers	41	55	4
House persons	31	66	3
Unemployed	41	54	5
Retired	28	68	4
Students	58	37	5
Subjective urbanisation			
Rural area or village	36	60	4
Small or middle sized town	41	55	4
Large town	49	47	4
Level of information about innovative foods			
Well informed	66	32	2
Not well informed	33	63	4
Prior awareness of innovative foods			
Have heard of	50	47	3
Have not heard of	22	72	6
Attitude towards innovative foods			
Positive	76	22	2
Negative	18	80	2

3. Price sensitivity and willingness to pay

Among those willing to buy such products, a majority would purchase them if priced the same.

Respondents who said they would be willing to buy a food product containing an ingredient produced using micro-organisms were then asked how price would influence their willingness to purchase it, assuming that the product was just as safe, just as nutritious and clearly labelled[27].

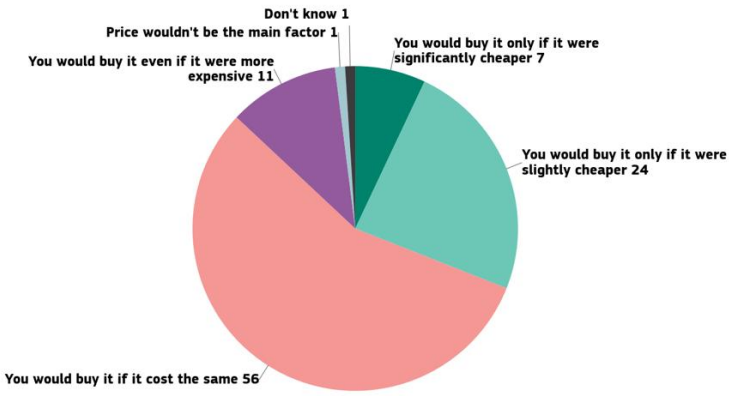
At EU level, a majority of those who are willing to buy (56%) say they would buy the product if it cost the same as existing alternatives. This makes it by far the most frequently selected response.

Around one quarter (24%) say they would buy the product only if it were slightly cheaper, while 7% would buy it only if it were significantly cheaper.

A smaller group (11%) say they would be willing to buy the product even if it were more expensive, suggesting that relatively few consumers would accept a price premium for this type of innovative food. Just 1% say that price would not be the main factor, while 1% do not express an opinion.

Overall, the findings suggest moderate price sensitivity among potential buyers. While most are willing to purchase innovative food products at the same price as conventional alternatives, relatively few are prepared to pay a premium, highlighting the importance of price parity for wider adoption.

QC8b: If you were interested in buying such a product, how would its price influence your willingness to buy it, provided that it is just as safe, just as nutritious, and clearly labelled? (EU27) (%)



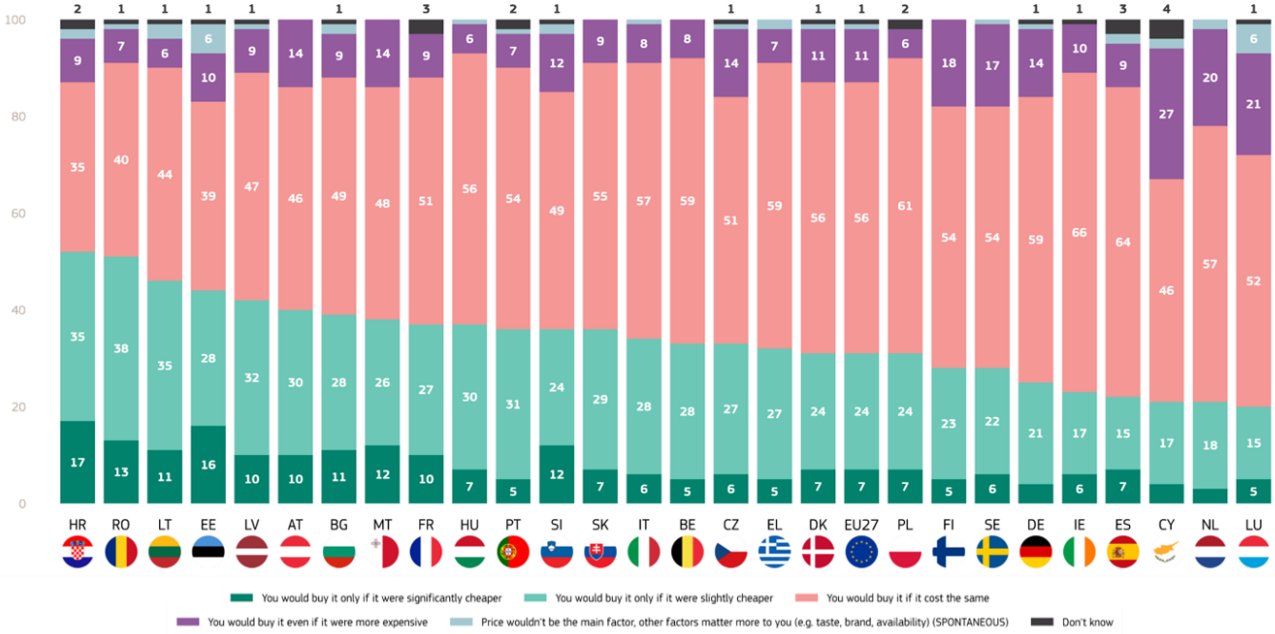
Base: Respondents willing to buy (N=11,016)

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A **national analysis** shows that attitudes towards paying a premium or requiring a lower or the same price vary across Member States.

Buying the product if it cost the same is the most frequently selected response in 23 Member States. The highest proportions are observed in Ireland (66%), Spain (64%) and Poland (61%). By contrast, this share is lowest in Croatia (35%), Lithuania (44%) and Cyprus (46%).

QC8b: If you were interested in buying such a product, how would its price influence your willingness to buy it, provided that it is just as safe, just as nutritious, and clearly labelled? (%)



[27] QC8b. If you were interested in buying such a product, how would its price influence your willingness to buy it, provided that it is just as safe, just as nutritious, and clearly labelled?

The highest proportions of respondents saying they would buy the product even if it were more expensive are recorded in Cyprus (27%), Luxembourg (21%) and the Netherlands (20%). At the other end of the scale, this view is least widespread in Lithuania, Hungary and Poland (all 6%), followed by Romania, Portugal and Greece (all 7%).

Needing the product to be cheaper than existing alternatives is most common in Croatia (52%), Romania (51%) and Lithuania (46%), where around half of respondents say they would buy it only if it were slightly or significantly cheaper. In contrast, this proportion is lowest in Luxembourg (20%), the Netherlands and Cyprus (both 21%), followed by Spain (22%).

The **socio-demographic analysis** shows that price sensitivity varies mainly according to education, familiarity with innovative foods and attitudes towards them.

- There are no meaningful differences by gender or age;
- Education is associated with greater willingness to accept a higher price for innovative food products. Respondents who completed their education at age 20 or later are more likely to buy the product even if it were more expensive (13% vs. 5% of those who left education at age 15 or earlier). Conversely, respondents who left education earlier are more likely to say they would buy it only if it were slightly cheaper (29% vs. 22%);
- Differences across socio-professional categories are modest. Self-employed respondents are the most likely to say they would buy it only if it were slightly cheaper (29%), while unemployed respondents are more likely to buy the product at the same price (61% vs. 50-57% among other groups);
- Rural respondents are slightly more likely to require the product to be cheaper (34% vs. 30%).
- Familiarity with innovative foods is linked to lower price sensitivity. Respondents who feel well informed are more likely to buy the product even at a higher price (14% vs. 8%) and less likely to require a lower price (26% vs. 35% combined slightly/significantly cheaper);
- Prior awareness follows a similar pattern. Those who had heard of innovative foods before the interview are twice as likely as those who had not to buy the product even if it were more expensive (12% vs. 6%). Those without prior awareness are more likely to require the product to be cheaper (38% vs. 29% combined slightly/significantly cheaper);
- Attitudes towards innovative foods are also associated with willingness to pay. Respondents with a positive view are more likely than those with a negative view to buy the product at the same price (59% vs. 47%) and are more than twice as likely to be willing to pay more (13% vs. 6%). By contrast, respondents with a negative view are more likely to require the product to be cheaper (45% vs. 26% combined slightly/significantly cheaper).

QC8b If you were interested in buying such a product, how would its price influence your willingness to buy it, provided that it is just as safe, just as nutritious, and clearly labelled? (% - EU)

	You would buy it only if it were significantly cheaper	You would buy it only if it were slightly cheaper	You would buy it if it cost the same	You would buy it even if it were more expensive	Price wouldn't be the main factor, other factors matter more to you (e.g. taste, brand, availability) (SPONTANEOUS)	Don't know
EU27	7	24	56	11	1	1
Gender						
Man	7	26	55	10	1	1
Woman	7	23	57	11	1	1
Age						
15-24	8	24	56	11	1	0
25-39	7	25	54	12	1	1
40-54	7	25	56	10	1	1
55+	6	23	58	10	1	2
Education (End of)						
15-	6	29	56	5	1	3
16-19	8	26	55	9	1	1
20+	5	22	58	13	1	1
Still Studying	6	24	58	11	1	0
Socio-professional category						
Self-employed	6	29	50	13	1	1
Managers	5	21	60	12	1	1
Other white collars	5	25	55	12	1	2
Manual workers	8	25	55	10	1	1
House persons	8	26	51	12	0	3
Unemployed	6	25	61	8	0	0
Retired	7	23	57	10	1	2
Students	7	25	57	11	0	0
Subjective urbanisation						
Rural area or village	6	28	56	8	1	1
Small or middle sized town	8	22	57	11	1	1
Large town	6	24	55	13	1	1
Level of information about innovative foods						
Well informed	5	21	59	14	1	0
Not well informed	8	27	54	8	1	2
Prior awareness of innovative foods						
Have heard of	6	23	57	12	1	1
Have not heard of	10	28	52	6	2	2
Attitude towards innovative foods						
Positive	5	21	59	13	1	1
Negative	12	33	47	6	1	1

4. Drivers of regular consumption

The most appealing factor that would encourage Europeans to consume innovative foods more regularly is a reduced use of pesticides, fertilisers or antibiotics.

The survey then examined which potential benefits could make Europeans more willing to consume innovative food products regularly, for example several times a month[28]. Respondents could select up to two benefits.

At EU level, the most frequently cited benefit is a **reduced use of pesticides, fertilisers or antibiotics in production**, mentioned by 35% of respondents. This places environmental and production-related considerations clearly ahead of other potential benefits.

A second tier of benefits is mentioned by around one in five Europeans. **Animal welfare** benefits rank second (23%), followed by both a **lower environmental impact, such as lower emissions or water use**, and a **better nutritional profile** (both 22%).

Smaller proportions mention **greater food security or resilience to extreme weather** (19%) and **longer shelf life or reduced food waste** (18%).

Notably, nearly one in five Europeans (18%) say that *none of these benefits would make them more willing to consume innovative foods regularly*, while only 3% do not express an opinion.

Overall, Europeans are most likely to be encouraged by benefits linked to more sustainable production methods, particularly reduced use of pesticides, fertilisers or antibiotics. Benefits related to animal welfare, environmental impact and nutrition also resonate with sizeable proportions of respondents, while food security and food waste reduction are mentioned somewhat less often.

QC10: Which of the following potential benefits, if any, would make you more willing to consume innovative food products regularly, e.g. several times a month? (MAX. 2 ANSWERS) (%)

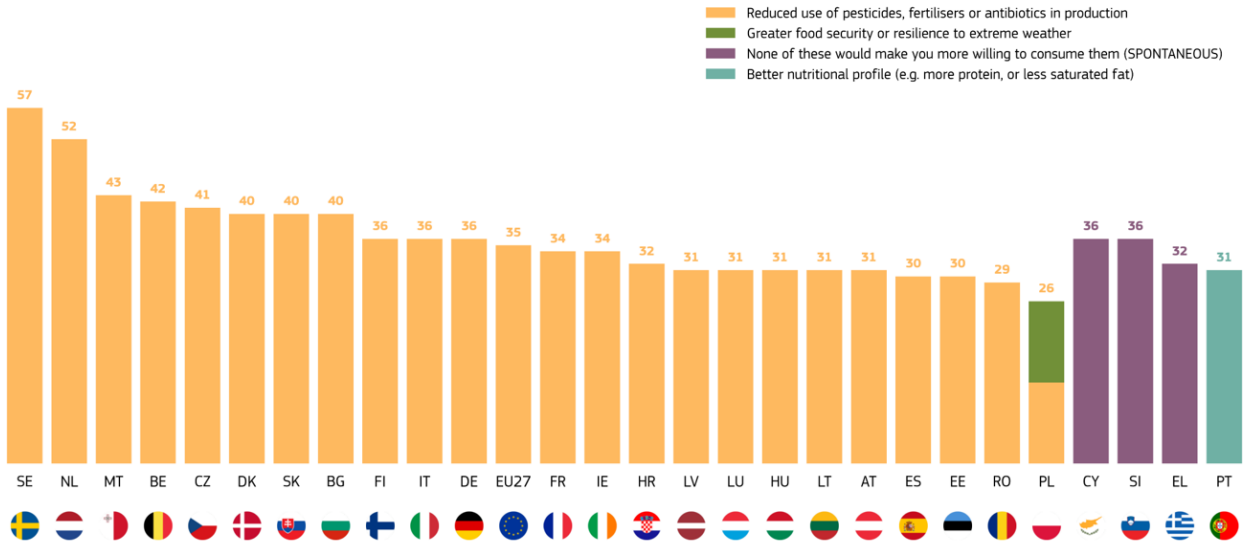


[28] QC10. Which of the following potential benefits, if any, would make you more willing to consume innovative food products regularly, e.g. several times a month? (MAX. 2 ANSWERS)

A **national analysis** shows that reducing the use of pesticides, fertilisers or antibiotics in production is the leading benefit in 22 Member States, particularly in Sweden (57%), the Netherlands (52%), and Malta (43%). In Poland it ranks first together with greater food security or resilience to extreme weather (both 26%).

A better nutritional profile ranks first only in Portugal (31%), while in three Member States the most selected answer is 'none of these would make them more willing to consume them', namely in Cyprus and Slovenia (both 36%), as well as in Greece (32%).

QC10: Which of the following potential benefits, if any, would make you more willing to consume innovative food products regularly, e.g. several times a month? (MAX. 2 ANSWERS) (%)



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QC10: Which of the following potential benefits, if any, would make you more willing to consume innovative food products regularly, e.g. several times a month? (MAX. 2 ANSWERS) (%)

	EU27	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	HR	IT	CY	LV	LT	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE
Reduced use of pesticides, fertilisers or antibiotics in production	35	42	40	41	40	36	30	34	31	30	34	32	36	26	31	31	31	31	43	52	31	26	26	29	26	40	36	57
Animal welfare benefits	23	27	12	20	36	33	18	22	21	20	20	15	25	17	12	13	18	15	18	30	27	14	14	14	15	17	23	24
Lower environmental impact, such as lower emissions or water use	22	25	19	15	34	23	17	17	18	19	22	22	24	10	12	15	22	21	25	34	22	17	11	19	16	24	31	50
Better nutritional profile (e.g. more protein, or less saturated fat)	22	23	23	24	22	17	20	28	22	23	21	18	23	19	21	26	22	21	31	21	19	23	31	23	15	23	27	19
Greater food security or resilience to extreme weather	19	21	19	13	10	13	14	15	16	20	16	25	25	12	10	13	13	25	21	15	16	26	28	21	16	27	15	16
Longer shelf life or reduced food waste	18	21	14	18	19	14	15	15	18	19	16	21	21	12	18	13	16	22	17	18	16	20	13	20	13	23	18	17
Other (SPONTANEOUS)	0	0	0	0	0	0	2	0	0	0	0	0	0	0	1	0	2	0	0	1	1	0	0	0	0	0	1	0
None of these would make you more willing to consume them (SPONTANEOUS)	18	8	20	14	7	23	21	17	32	18	25	19	12	36	18	27	24	21	13	6	27	14	23	16	36	8	9	3
Don't know	3	1	5	3	6	2	8	6	2	4	4	4	3	5	12	6	1	2	3	1	1	4	9	2	1	1	4	1

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The **socio-demographic analysis** shows that drivers of regular consumption are most strongly associated with education, familiarity with innovative foods, attitudes towards them and willingness to purchase innovative foods.

- There are no meaningful differences between men and women across the main benefits, however, women are slightly more likely to select animal welfare (25% vs. 21%);
- Age differences are generally limited. However, respondents aged 15-24 are more likely than those aged 55 and over to mention a better nutritional profile (27% vs. 17%), lower environmental impact (26% vs. 19%), and animal welfare (27% vs. 21%). Respondents aged 55 and over are also more likely to say that none of the proposed benefits would make them more willing to consume innovative foods regularly (24% vs. 10% among those aged 15-24);
- Education is associated with greater recognition of the potential benefits of innovative foods. Respondents who completed their education at age 20 or later are more likely than to mention reduced use of pesticides (38% vs. 28% among those who left education at age 15 or earlier), a lower environmental impact (28% vs. 15%), animal welfare benefits (25% vs. 19%), and a better nutritional profile (23% vs. 17%). They are also substantially less likely to say that none of the proposed benefits would encourage regular consumption (13% vs. 29%);
- Differences across socio-professional categories are generally modest. However, managers are slightly more likely than average to mention a reduced use of pesticides, fertilisers or antibiotics (39%), while students are more likely to mention animal welfare benefits (29%), a lower environmental impact (28%) and a better nutritional profile (27%);
- Respondents living in large towns are more likely than those living in rural areas or villages to mention animal welfare benefits (27% vs. 21%) and a lower environmental impact (26% vs. 19%). They are also less likely to reject all proposed benefits (14% vs. 21%);
- Familiarity with innovative foods is closely linked to perceptions of their benefits. Respondents who feel well informed are more likely than those who do not feel well informed to mention animal welfare benefits (27% vs. 22%), a lower environmental impact (28% vs. 20%), a better nutritional profile (25% vs. 20%) and greater food security or resilience to extreme weather (24% vs. 17%);
- Prior awareness shows a similar pattern. Respondents who had heard of innovative foods before the interview are more likely than those who had not to identify each of the proposed benefits, particularly a lower environmental impact (26% vs. 14%) and a better nutritional profile (24% vs. 17%);
- Respondents with a positive view are much more likely than those with a negative view to mention animal welfare benefits (29% vs. 19%), a lower environmental impact (31% vs. 16%), a better nutritional profile (28% vs. 17%) and greater food security (24% vs. 15%). In contrast, respondents with a negative view are far more likely to say that none of the proposed benefits would make them more willing to consume innovative foods regularly (31% vs. 2%);
- Respondents with high willingness to buy are considerably more likely than those with low willingness to identify all proposed benefits, particularly a lower environmental impact (32% vs. 15%), animal welfare benefits (30% vs. 18%) and a better nutritional profile (29% vs. 16%). Only 1% say that none of the proposed benefits would encourage regular consumption, compared with 32% of those with low willingness to buy.

QC10 Which of the following potential benefits, if any, would make you more willing to consume innovative food products regularly, e.g. several times a month? (MAX. 2 ANSWERS)
(% - EU)

	Reduced use of pesticides, fertilisers or antibiotics in production	Animal welfare benefits	Lower environmental impact, such as lower emissions or water use	Better nutritional profile (e.g. more protein, or less saturated fat)	Greater food security or resilience to extreme weather	Longer shelf life or reduced food waste	Other (SPONTANEOUS)	None of these would make you more willing to consume them (SPONTANEOUS)	Don't know
EU27	35	23	22	22	19	18	0	18	3
Gender									
Man	35	21	22	22	20	19	0	18	3
Woman	34	25	22	21	18	17	0	18	3
Age									
15-24	32	27	26	27	19	18	0	10	4
25-39	32	25	26	25	21	21	0	12	3
40-54	36	22	23	23	20	18	0	17	2
55+	35	21	19	17	16	16	0	24	4
Education (End of)									
15-	28	19	15	17	15	17	0	29	5
16-19	34	21	19	20	20	18	0	20	3
20+	38	25	28	23	18	18	0	13	2
Still Studying	33	30	28	28	19	18	0	10	4
Socio-professional category									
Self-employed	35	23	22	24	22	17	0	17	2
Managers	39	26	28	25	22	18	0	12	2
Other white collars	36	23	25	23	21	18	0	14	2
Manual workers	32	21	20	22	20	20	0	17	3
House persons	31	23	21	21	16	16	0	21	3
Unemployed	33	21	20	23	18	20	0	19	3
Retired	35	21	18	16	14	15	0	27	4
Students	33	29	28	27	18	18	0	9	4
Subjective urbanisation									
Rural area or village	34	21	19	20	19	17	0	21	3
Small or middle sized town	34	22	22	22	18	18	0	19	3
Large town	36	27	26	22	19	18	0	14	3
Level of information about innovative foods									
Well informed	35	27	28	25	24	21	0	8	1
Not well informed	35	22	20	20	17	16	0	22	4
Prior awareness of innovative foods									
Have heard of	37	25	26	24	21	20	0	12	2
Have not heard of	29	18	14	17	14	13	0	33	5
Attitude towards innovative foods									
Positive	39	29	31	28	24	23	0	2	1
Negative	32	19	16	17	15	14	0	31	3
Willingness to buy innovative foods									
High	41	30	32	29	24	22	0	1	1
Low	30	18	15	16	15	14	0	32	3



Conclusion

Conclusion

This Special Eurobarometer provides a general overview of how Europeans perceive innovative foods and the conditions under which they may be willing to accept them. The findings show that, while innovative foods remain a relatively new and unfamiliar topic for many citizens, Europeans' views of food innovation are mixed and differentiated rather than uniformly negative. Rather, their views reflect a combination of interest, caution and clear expectations regarding transparency, safety and public oversight.

Awareness of innovative foods is already widespread, with 69% of Europeans having heard, read or seen at least something about them before the interview. However, this exposure is often limited: 45% had heard only a little, while 72% do not feel well informed, pointing to a gap between exposure and understanding. Against this backdrop, attitudes remain more negative than positive overall. However, greater familiarity is consistently associated with more favourable perceptions, with respondents who feel informed or have previously heard of innovative foods consistently more likely to recognise potential benefits and express willingness to purchase innovative food products.

This relationship is also visible at country level. Member States with comparatively high levels of awareness and self-reported knowledge, such as the Netherlands, Sweden, Denmark and Finland, also tend to record more positive views of innovative foods and higher willingness to purchase innovative food products.

Acceptance also varies depending on the type of innovation involved. Europeans are most comfortable with foods developed using modern techniques to improve crop resilience, as well as plant-based and fermentation-based products, while products cultivated from animal parts or cells encounter substantially greater hesitation.

Importantly, Europeans recognise the potential societal contribution of food innovation. Seven in ten agree that innovation in food systems can create new opportunities for research, skills and jobs in Europe, while 68% agree that it can provide farmers and food producers with additional tools to respond to challenges such as climate change, pests, resource scarcity and supply disruptions. Moreover, the findings demonstrate that Europeans associate a range of potential benefits with innovative foods. The most frequent responses were reducing pressure on natural resources, supporting food security, and improving nutritional profile.

However, support for innovative foods is accompanied by clear expectations. Concerns about potential long-term health impacts, perceptions that products are highly processed or unnatural, and a lack of clear information emerge as the main barriers to acceptance. Transparency consistently appears as a key requirement, with large majorities believing that innovative food products should have clear and distinct names, accompanied by transparent information about how they are produced, their composition and their origin.

Trust emerges as a central factor shaping consumer acceptance. Europeans are most likely to gain confidence from clear labelling, independent safety assessments beyond the producer's own data, "EFSA assessment" and regular public reporting on safety findings. National food safety authorities, health professionals and independent scientists are the sources most frequently selected for trustworthy information, highlighting the importance of independent verification and credible communication in building public confidence.

The results further indicate that acceptance of innovative foods remains conditional. Even when products are presented as meeting EU safety standards and being clearly labelled, Europeans are more likely to express reluctance than willingness to purchase them. Nevertheless, a substantial minority (42%) indicate a willingness to do so, particularly when products offer clear and tangible benefits. Among those willing to buy, a majority would purchase innovative foods at the same price as conventional alternatives, suggesting that trust, familiarity and perceived benefits are important drivers of acceptance together with price.

The survey also highlights important differences across the population. Younger and more highly educated respondents tend to be more familiar with innovative foods, hold more positive views of them, and show greater willingness to try or purchase innovative food products. By contrast, older respondents and those with lower levels of education are generally more cautious.

Overall, the findings suggest that Europeans already recognise the possible value of food innovation, but attitudes and stated willingness are product-specific and closely associated with expectations of clear benefits, transparent information, robust safety assessment and credible public oversight. Acceptance appears strongest when innovative foods are perceived as addressing concrete societal challenges, supporting sustainability and food security, and remaining aligned with consumers' expectations regarding safety, transparency and public accountability. As innovative food technologies continue to develop, building trust through clear communication, robust regulation and independent oversight is likely to play a central role in their future acceptance across Europe.

Technical Specifications

Between 26 May[29] and 24 June 2026, Verian Belgium carried out the wave 105.4 of the Eurobarometer survey, on request of the European Commission, Directorate-General for Communication, "Public Opinion & Citizen Engagement" Unit.

The Wave 105.4 covers the population of the respective nationalities of the European Union Member States, resident in each of the 27 Member States and aged 15 years and over.

The basic sample design applied in all countries is a stratified multi-stage, random (probability) one. In each country, the sample frame is first stratified by NUTS regions and within each region by a measure of urbanity (DEGURBA). The number of sample points selected in each strata reflects the stratum population 15+. At the second stage sampling points were drawn with probability proportional to their 0+ population size from within each stratum. The samples thus represent the whole territory of the countries surveyed according to the EUROSTAT NUTS II (or equivalent) and according to the distribution of the resident population of the respective nationalities in terms of metropolitan, urban and rural areas[30].

In each of the selected sampling points, a starting coordinate was drawn at random and a reverse geo-coding tool used to identify the closest address to the coordinate. This address was the starting address for the random walk. Further addresses (every Nth address) were selected by standard "random route" procedures, from the initial address. In each household, the respondent was drawn, at random. The approach to the random selection was conditional on the household size. By way of example for households with two 15+ members the script was used to select either the informant (person responding to the screener questionnaire) or the other eligible member in the household. For households with three 15+ members the script was used to select either the informant (1/3 of the time) or the two other eligible members in the household (2/3 of the time). Where the two other members were selected, the interviewer was then told to either ask for the youngest or oldest. The script would randomly assign the selection to youngest or oldest with equal probability. This process continues for four 15+ household members – randomly asking for the youngest, 2nd youngest and oldest. For households with five 15+ members we revert to the last birthday rule.

If no contact was made with anyone in the household, or if the respondent selected was not available (busy), the interviewer revisited the same household up to three additional times (four contact attempts in total). Interviewers never indicate that the survey is conducted on behalf of the European Commission beforehand; they may give this information once the survey is completed, upon request.

The recruitment phase was slightly different in the Netherlands, Finland, and Sweden. In the two latter countries, a sample of addresses within each sampling point were selected from the address or population register (in Finland, selection is not done in all sample points, but in some where response rates are expected to improve). The selection of addresses was done in a random manner. Households were then contacted by telephone and recruited to take part in the survey. In the Netherlands, a dual frame RDD sample (mobile and landline numbers) are used as there is no comprehensive population register with telephone numbers available. The selection of numbers on both frames is done in a random manner with each number getting an equal probability of selection. Unlike Sweden and Finland, the sample is un-clustered.

[29] Exceptionally, Malta needed to start earlier, on 22 May 2026.

[30] Urban Rural classification based on DEGURBA (https://ec.europa.eu/eurostat/web/degree-of-urbanisation/background)

Net sample size and fieldwork period

	COUNTRIES	INSTITUTES	N° INTERVIEWS	FIELDWORK DATES		POPULATION 15+	PROPORTION EU27
BE	Belgium	MCM Belgium	1,004	26-05-2026	15-06-2026	9,892,796	2.6%
BG	Bulgaria	Kantar TNS BBSS	1,012	26-05-2026	15-06-2026	5,534,456	1.4%
CZ	Czechia	STEM/MARK	1,032	26-05-2026	10-06-2026	9,172,797	2.4%
DK	Denmark	Mantle Denmark (Verian)	1,010	26-05-2026	24-06-2026	5,022,981	1.3%
DE	Germany	Mantle Germany (Verian)	1,507	26-05-2026	15-06-2026	71,818,299	18.7%
EE	Estonia	B&B Research OÜ	1,006	26-05-2026	16-06-2026	1,154,359	0.3%
IE	Ireland	B and A Research	1,008	26-05-2026	15-06-2026	4,338,938	1.1%
EL	Greece	Kantar Greece	1,007	26-05-2026	15-06-2026	9,041,201	2.4%
ES	Spain	Mantle Spain (Verian)	1,022	26-05-2026	15-06-2026	42,189,318	11.0%
FR	France	MCM France	1,012	26-05-2026	15-06-2026	56,855,864	14.8%
HR	Croatia	Hendal	1,004	26-05-2026	14-06-2026	3,319,752	0.9%
IT	Italy	Testpoint Italia	1,040	26-05-2026	15-06-2026	51,784,963	13.5%
CY	Rep. of Cyprus	CYMAR Market Research	502	26-05-2026	15-06-2026	818,909	0.2%
LV	Latvia	Kantar TNS Latvia	1,000	26-05-2026	15-06-2026	1,579,066	0.4%
LT	Lithuania	Norstat LT	1,032	26-05-2026	15-06-2026	2,467,008	0.6%
LU	Luxembourg	ILRES	511	26-05-2026	15-06-2026	566,303	0.1%
HU	Hungary	Kantar Hoffmann	1,028	26-05-2026	15-06-2026	8,199,448	2.1%
MT	Malta	MISCO International	519	22-05-2026	14-06-2026	493,961	0.1%
NL	Netherlands	MCM Netherlands	1,002	26-05-2026	15-06-2026	15,228,902	4.0%
AT	Austria	Das Österreichische Gallup Ins.	1,006	26-05-2026	14-06-2026	7,842,929	2.0%
PL	Poland	Research Collective	1,022	26-05-2026	15-06-2026	31,082,980	8.1%
PT	Portugal	Intercampus SA	1,060	26-05-2026	15-06-2026	9,275,958	2.4%
RO	Romania	CSOP SRL	1,045	26-05-2026	15-06-2026	16,034,437	4.2%
SI	Slovenia	Mediana DOO	1,006	26-05-2026	15-06-2026	1,811,104	0.5%
SK	Slovakia	MNFORCE	1,003	26-05-2026	12-06-2026	4,557,290	1.2%
FI	Finland	Taloustutkimus Oy	1,000	26-05-2026	16-06-2026	4,771,619	1.2%
SE	Sweden	Mantle Sweden (Verian)	1,056	26-05-2026	15-06-2026	8,748,126	2.3%
		TOTAL EU27	26,456	22-05-2026	24-06-2026	383,603,764	100%

* It should be noted that the total percentage shown in this table may exceed 100% due to rounding.

Interviewing mode per country

Interviews were conducted through face-to-face interviews, either physically in people's homes or through remote video interaction in the appropriate national language. Interviews with remote video interaction ("online face-to-face" or CAVI, Computer Assisted Video Interviewing, were conducted only in Republic of Cyprus, Denmark, Malta, Finland and Sweden).

	COUNTRIES	N° OF CAPI INTERVIEWS	N° OF CAVI INTERVIEWS	TOTAL N° INTERVIEWS
BE	Belgium	1,004		1,004
BG	Bulgaria	1,012		1,012
CZ	Czechia	1,032		1,032
DK	Denmark	649	361	1,010
DE	Germany	1,507		1,507
EE	Estonia	1,006		1,006
IE	Ireland	1,008		1,008
EL	Greece	1,007		1,007
ES	Spain	1,022		1,022
FR	France	1,012		1,012
HR	Croatia	1,004		1,004
IT	Italy	1,040		1,040
CY	Rep. Of Cyprus	411	91	502
LV	Latvia	1,000		1,000
LT	Lithuania	1,032		1,032
LU	Luxembourg	511		511
HU	Hungary	1,028		1,028
MT	Malta	359	160	519
NL	Netherlands	1,002		1,002
AT	Austria	1,006		1,006
PL	Poland	1,022		1,022
PT	Portugal	1,060		1,060
RO	Romania	1,045		1,045
SI	Slovenia	1,006		1,006
SK	Slovakia	1,003		1,003
FI	Finland	715	285	1,000
SE	Sweden	715	341	1,056
	TOTAL EU27	25,218	1,238	26,456

CAPI : Computer-Assisted Personal interviewing
CAVI : Computer-Assisted Video interviewing

Response rates

For each country a comparison between the responding sample and the universe (i.e. the overall population in the country) is carried out. Weights are used to match the responding sample to the universe on gender by age, region and degree of urbanisation. For European estimates (i.e. EU average), an adjustment is made to the individual country weights, weighting them up or down to reflect their 15+ population as a proportion of the EU 15+ population.

The response rates are calculated by dividing the total number of complete interviews with the number of all the addresses visited, apart from ones that are not eligible but including those where eligibility is unknown. For wave 105.4 of the Eurobarometer survey, the response rates for the EU27 countries, calculated by Verian Belgium, are:

	COUNTRIES	RESPONSE RATES
BE	Belgium	60.3%
BG	Bulgaria	43.9%
CZ	Czechia	60.7%
DK	Denmark	58.9%
DE	Germany	31.6%
EE	Estonia	58.0%
IE	Ireland	58.2%
EL	Greece	37.1%
ES	Spain	35.9%
FR	France	35.0%
HR	Croatia	47.8%
IT	Italy	31.9%
CY	Rep. Of Cyprus	81.8%
LV	Latvia	64.4%
LT	Lithuania	44.4%
LU	Luxembourg	29.9%
HU	Hungary	61.5%
MT	Malta	86.5%
NL	Netherlands	95.2%
AT	Austria	46.6%
PL	Poland	50.1%
PT	Portugal	47.8%
RO	Romania	50.1%
SI	Slovenia	52.8%
SK	Slovakia	54.2%
FI	Finland	20.8%
SE	Sweden	78.9%

Margins of error

Readers are reminded that survey results are estimations, the accuracy of which, everything being equal, rests upon the sample size and upon the observed percentage. With samples of about 1,000 interviews, the real percentages vary within the following confidence limits.

Statistical Margins due to the sampling process

(at the 95% level of confidence)

various sample sizes are in rows *various observed results are in columns*

	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	
N=50	6,0	8,3	9,9	11,1	12,0	12,7	13,2	13,6	13,8	13,9	N=50
N=500	1,9	2,6	3,1	3,5	3,8	4,0	4,2	4,3	4,4	4,4	N=500
N=1000	**1,4**	**1,9**	**2,2**	**2,5**	**2,7**	**2,8**	**3,0**	**3,0**	**3,1**	**3,1**	**N=1000**
N=1500	1,1	1,5	1,8	2,0	2,2	2,3	2,4	2,5	2,5	2,5	N=1500
N=2000	1,0	1,3	1,6	1,8	1,9	2,0	2,1	2,1	2,2	2,2	N=2000
N=3000	0,8	1,1	1,3	1,4	1,5	1,6	1,7	1,8	1,8	1,8	N=3000
N=4000	0,7	0,9	1,1	1,2	1,3	1,4	1,5	1,5	1,5	1,5	N=4000
N=5000	0,6	0,8	1,0	1,1	1,2	1,3	1,3	1,4	1,4	1,4	N=5000
N=6000	0,6	0,8	0,9	1,0	1,1	1,2	1,2	1,2	1,3	1,3	N=6000
N=7000	0,5	0,7	0,8	0,9	1,0	1,1	1,1	1,1	1,2	1,2	N=7000
N=7500	0,5	0,7	0,8	0,9	1,0	1,0	1,1	1,1	1,1	1,1	N=7500
N=8000	0,5	0,7	0,8	0,9	0,9	1,0	1,0	1,1	1,1	1,1	N=8000
N=9000	0,5	0,6	0,7	0,8	0,9	0,9	1,0	1,0	1,0	1,0	N=9000
N=10000	0,4	0,6	0,7	0,8	0,8	0,9	0,9	1,0	1,0	1,0	N=10000
N=11000	0,4	0,6	0,7	0,7	0,8	0,9	0,9	0,9	0,9	0,9	N=11000
N=12000	0,4	0,5	0,6	0,7	0,8	0,8	0,9	0,9	0,9	0,9	N=12000
N=13000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,9	0,9	N=13000
N=14000	0,4	0,5	0,6	0,7	0,7	0,8	0,8	0,8	0,8	0,8	N=14000
N=15000	0,3	0,5	0,6	0,6	0,7	0,7	0,8	0,8	0,8	0,8	N=15000
	5%	10%	15%	20%	25%	30%	35%	40%	45%	50%	
	95%	90%	85%	80%	75%	70%	65%	60%	55%	50%	

Questionnaire

QC1. To what extent do you feel informed about innovative foods?

(READ OUT – SHOW SCREEN - ONE ANSWER ONLY)	
1	Very well informed
2	Fairly well informed
3	Not very informed
4	Not at all informed
5	Don't know (*SPONTANEOUS*)

QC2. Before this interview, how much have you heard, read or seen about innovative foods?

(READ OUT – SHOW SCREEN – ONE ANSWER ONLY)	
1	A great deal
2	Quite a lot
3	A little
4	Nothing at all
5	Don't know (*SPONTANEOUS*)

QC3. Regardless of how well informed you feel, would you say that you have a positive or negative view of innovative foods?

(READ OUT – SHOW SCREEN - ONE ANSWER ONLY)	
1	Very positive
2	Somewhat positive
3	Somewhat negative
4	Very negative
5	Don't know (*SPONTANEOUS*)

QC4. "Innovative foods" encompass a variety of technologies and products. How comfortable would you be to consume each of the following?

(SHOW SCREEN - READ OUT – RANDOMISATION OF STATEMENTS – ONE ANSWER PER LINE)	
1	Foods made using fermentation with micro-organisms, for example to produce vitamins or proteins
2	Plant-based protein products obtained by new methodologies (e.g. dietary supplements for exercise and athletic performance)
3	Food products cultivated from animal (including fish) parts or animal cells
4	Foods developed using modern techniques, for example fruits or vegetables adapted to better withstand drought, pests, or extreme weather

Answers:

1. Very comfortable
2. Somewhat comfortable
3. Somewhat uncomfortable
4. Very uncomfortable
5. Don't know

QC5. Which of the following, if any, would be your most important concerns before consuming innovative food products, ingredients or crops?

(READ OUT - SHOW SCREEN – RANDOMISATION - TWO ANSWERS POSSIBLE)	
1	Potential long-term unknown health impacts
2	The perception that they are highly processed or unnatural
3	Their possible impact on farmers, rural areas or traditional food production
4	A lack of trust in the companies producing them
5	A lack of clear information on how they are produced, their composition or origin
6	A belief that current food systems already work well
7	Other (SPONTANEOUS)
8	None - Would have no concern to consume innovative foods (*SPONTANEOUS*)
9	Don't know (*SPONTANEOUS*)

QC6. Which of the following possible opportunities, if any, do you associate with innovative food products, ingredients or crops?

(READ OUT - SHOW SCREEN – RANDOMISATION - TWO ANSWERS POSSIBLE)	
1	Supporting food security Interviewer instruction: food security means having reliable access to sufficient and nutritious food
2	Reducing pressure on natural resources
3	Supporting healthier or more nutritious food options
4	Creating new opportunities for research, innovation and jobs in Europe
5	Supporting farmers and food producers with new tools and options
6	Improving consumer choice, with clear information and labelling
7	Other (SPONTANEOUS)
8	None (*SPONTANEOUS*)
9	Don't know (*SPONTANEOUS*)

QC7. Here is a list of terms that might appear on a new food product (innovative food). Which term would make you most willing to try it?

(READ OUT – SHOW SCREEN - RANDOMISATION- THREE ANSWERS POSSIBLE)	
1	Precision-bred Interviewer instruction: Precision breeding uses modern techniques, such as gene editing, to make targeted changes to the DNA of plants or animals. These changes are equivalent to those that could occur through traditional breeding and do not involve adding genes from another species.
2	Cultivated
3	Lab-grown
4	Cell-derived
5	Made using fermentation
6	Alternative proteins
7	Animal-free
8	Advanced fermentation Interviewer instruction: Using specially engineered micro-organisms like yeast or bacteria to produce specific food ingredients
9	None of these, you would not be willing to try any such product (*SPONTANEOUS*)
10	Don't know (*SPONTANEOUS*)

QC8a. Imagine a food ingredient produced using micro-organisms, for example a protein identical to those found in eggs but made without using animals. If it met EU safety standards and was clearly labelled, how willing would you be to buy a food product containing this ingredient?

(READ OUT – SHOW SCREEN - ONE ANSWER ONLY)	
1	Very willing
2	Somewhat willing
3	Somewhat unwilling
4	Very unwilling
5	Don't know (*SPONTANEOUS*)

Filter: *only to those willing to buy it (codes 1 or 2 in QC8a)*

QC8b. If you were interested in buying such a product, how would its price influence your willingness to buy it, provided that it is just as safe, just as nutritious, and clearly labelled?

(READ OUT – SHOW SCREEN - ONE ANSWER ONLY)	
1	You would buy it even if it were more expensive
2	You would buy it if it cost the same
3	You would buy it only if it were slightly cheaper
4	You would buy it only if it were significantly cheaper
5	Price wouldn't be the main factor, other factors matter more to you (e.g. taste, brand, availability) (SPONTANEOUS)
6	Don't know (SPONTANEOUS)

QC9. Which of the following would most increase your confidence about consuming innovative food products?

(READ OUT – SHOW SCREEN – RANDOMISATION - MULTIPLE ANSWERS POSSIBLE)	
1	Approval by the European Food Safety Authority (EFSA)
2	A mandatory, clear label detailing how it was produced, its composition and origin
3	An independent safety assessment beyond the producer's own data (consumer associations, NGOs, independent researchers, etc.)
4	Regular public reporting on safety findings
5	Other (SPONTANEOUS)
6	None, nothing would make you more confident about consuming innovative food (SPONTANEOUS)
7	Don't know (SPONTANEOUS)

QC10. Which of the following potential benefits, if any, would make you more willing to consume innovative food products regularly, e.g. several times a month?

(READ OUT – SHOW SCREEN – RANDOMISATION - TWO ANSWERS MAXIMUM)	
1	Reduced use of pesticides, fertilisers or antibiotics in production
2	Lower environmental impact, such as lower emissions or water use
3	Better nutritional profile (e.g. more protein, or less saturated fat)
4	Longer shelf life or reduced food waste
5	Animal welfare benefits
6	Greater food security or resilience to extreme weather
7	Other (SPONTANEOUS)
8	None of these would make you more willing to consume them (SPONTANEOUS)
9	Don't know (SPONTANEOUS)

QC11. To what extent do you agree or disagree with the following statements?

(READ OUT – SHOW SCREEN – RANDOMISATION – ONE ANSWER PER LINE)	
1	The widespread introduction of innovative foods could be a threat to culinary traditions and rural heritage if it is not properly regulated and transparently labelled
2	Food innovation can provide additional tools to help farmers and food producers respond to challenges such as climate change, pests, resource scarcity or supply disruptions
3	Innovation in food systems can create new opportunities for research, skills and jobs in Europe
4	Innovative food products and ingredients should have clear and distinct names, with transparent information on how they are produced, their composition and origin

Answers:

1. Totally agree
2. Tend to agree
3. Tend to disagree
4. Totally disagree
5. Don't know

QC12. Which of the following sources of information would you use in order to get trustworthy information about the safety and environmental impact of innovative foods?

(READ OUT – SHOW SCREEN – RANDOMISATION - THREE ANSWERS MAXIMUM)	
1	Independent scientists and academia
2	Health professionals
3	EU food safety authorities (EFSA)
4	A national food safety authority (example given for each EU country)
5	Consumer organisations and NGOs
6	Traditional farmers
7	The food industry
8	Other (SPONTANEOUS)
9	Don't know (SPONTANEOUS)

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