European Commission

FLASH EUROBAROMETER

EU agricultural, food and beverage products in third countries

EUROBAROMETER **REPORT**
March 2026

Survey conducted by Demoscopy at the request of the European Research Executive Agency (REA).

Manuscript completed in February 2026

First edition

Luxembourg: Publications Office of the European Union, 2026

Catalogue number	JW-01-26-019-EN-N
ISBN	978-92-95234-97-0
Doi:	10.2848/0552976

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Introduction

The European Union operates in a highly competitive and fast-changing global trade environment. Agricultural, food and beverage products are a key part of the EU economy and an important component of trade with third countries. In 2024, the EU reached record levels of agrifood exports, with the total value of exported products amounting to €235.4 billion, while imports also increased but the sector still recorded a positive trade balance of around €63.6 billion. Exports grew by about 3 % compared with the previous year. In this context, strengthening the visibility, reputation, and presence of EU agricultural, food and beverage products in third countries has become a strategic priority.

To support the objectives of strengthening the visibility, reputation and trust associated with EU agricultural, food and beverage products, the European Union has developed a range of targeted promotional initiatives and policy instruments: The European Commission co-finances and also directly organises campaigns and events to promote EU farm products worldwide. This is carried out under the slogan "Enjoy, it's from Europe", which aims to raise awareness of the efforts made by European farmers to produce quality products including high safety standards, authenticity, environmental sustainability and animal welfare practices. By reinforcing recognition of EU quality schemes and standards, the Union seeks to enhance consumer trust and support export performance.

The 2026 Flash Eurobarometer builds on the 2021 wave conducted by Ipsos, while introducing several methodological changes that should be taken into account when interpreting trends over time[1]. The survey tracks the evolution of awareness, attitudes and purchasing behaviour since 2021 in the ten third-country markets already covered in the previous wave (China, India, Indonesia, Japan, Mexico, Saudi Arabia, South Korea, Thailand, the United Arab Emirates and the United Kingdom) and establishes a new baseline in the United States. As a result, comparisons with 2021 are used in this report as indicative signals rather than as strict trend measures.

Within this framework, the survey provides evidence-based insights into:

• The evolution of awareness, knowledge and consumption of EU agricultural, food and beverage products.

• Consumer perceptions across key product attributes, including safety, quality, authenticity, taste, nutritional value, sustainability, animal welfare and value for money.

• Drivers and barriers influencing purchasing decisions in third-country markets.

• Recognition and understanding of EU quality labels, including Protected Designation of Origin (PDO), Protected Geographical Indication (PGI), the Organic label, and the "Enjoy It's From Europe" signature.

• Market-specific opportunities to inform future strategic communication planning.

On behalf of the European Research Executive Agency (REA), Demoscopy interviewed a sample of urban residents aged 20 to 55 in each of the following third countries: China, India, Indonesia, Japan, Mexico, Saudi Arabia, South Korea, Thailand, the United Arab Emirates, the United Kingdom and the United States. This target group was selected because it corresponds to the core consumer segment most likely to have access to, and purchase, imported agricultural, food and beverage products from the European Union. The results should therefore be interpreted as representative of urban residents aged 20 to 55 in the surveyed countries, rather than of the

[1] https://op.europa.eu/en/publication-detail/-/publication/db79378b-afd2-11ec-83e1-01aa75ed71a1/language-en

overall national population. As such, the findings provide insights into the views and behaviours of potential target buyers but should not be extrapolated to the full population of each country.

Between the 4 February 2026 and 11 February 2026, 11,119 interviews were conducted using a CAWI (Computer Assisted Web Interviewing) data collection mode, with around 1,000 interviews carried out in each country.

Notes

- **Survey data are weighted**
- Survey results are subject to **sampling tolerances** meaning that not all apparent differences between countries or groups may be statistically significant.
- When respondents could select **more than one answer**, the **sum of response percentages may exceed 100%.**
- Comparisons with the 2021 Flash Eurobarometer on EU agricultural, food and beverage products in third countries, conducted by Ipsos, should be interpreted with caution due to methodological changes between the two waves. The sample size per country was doubled from approximately 500 to 1,000 interviews, and gender quotas were rebalanced from a 70/30 to a 50/50 female-to-male ratio. This change in sample composition limits the extent to which changes over time can be interpreted as strict trends. The addition of the United States in 2026 does not prevent country-level comparisons for the ten markets covered in both waves, but it affects comparisons at the overall level, as the 2026 total includes one additional country whereas the 2021 total did not. As a result, comparisons with 2021 should be read as indicative signals rather than direct trend measures.
- The survey is representative of urban residents aged 20 to 55 in each surveyed country. It is not designed to be representative of the overall national population. Results should therefore be interpreted as reflecting the views and behaviours of the target consumer segment most likely to purchase imported EU agricultural, food and beverage products.
- In this report, countries are referred to by their official abbreviation as indicated below.

CN	China	MX	Mexico	AE	United Arab Emirates
IN	India	SA	Saudi Arabia	UK	United Kingdom
ID	Indonesia	KR	South Korea	US	United States
JP	Japan	TH	Thailand		

1. Key findings

Attention to product origin is well established and stable over time, particularly among parents and urban consumers

- Nearly six in ten consumers (57%) say they always or often check the country or region of origin of agricultural, food and beverage products, **a proportion consistent with the level measured in 2021 (56%)**, confirming that attention to origin is a well-established and enduring consumer habit. In total, 86% of consumers check product origin at least sometimes.

- Consumers with children are significantly more likely to check product origin (64%) compared to those without (47%). **The 30–39 age group, which overlaps with young parents, records the highest attention level (61%)**. At the country level, the practice is most widespread in Saudi Arabia (69%) and India (69%), but notably less common in the United States (39%) and the United Kingdom (35%).

European products have a genuine foothold in global consumption habits, with particularly strong penetration in the Gulf countries and the United Kingdom

- Overall, **40% of consumers report consuming EU agricultural, food and beverage products at least once a week**, including 13% who do so daily. This level of penetration is close to that recorded for non-EU foreign products (37% weekly), indicating that European products broadly match other imported goods in terms of consumption frequency.

- **The United Arab Emirates (58% weekly), the United Kingdom (50%) and Saudi Arabia (45%)** emerge as the strongest markets for regular consumption of EU products. By contrast, consumption appears more limited in Mexico (27%) and Japan (28%), where EU products face stronger competition from domestic production and other import sources.

Quality is the dominant purchasing criterion, while ethical and sustainability considerations remain secondary

- **Quality clearly emerges as the most important criterion** when consumers buy agricultural, food or beverage products, cited by more than three quarters of respondents (76%). Taste (56%), price (45%) and safety (41%) are the other most frequently mentioned criteria. Compared with 2021, the importance of quality and safety appears to have increased, while price is cited less frequently.

- Factors related to broader ethical or sustainability considerations remain much less central: **environmental sustainability is mentioned by only 8% of respondents and animal welfare by just 5%**. Significant differences emerge across countries, with food safety particularly prominent in China (65%) and Thailand (64%), while price is more important in Japan (54%), the United Kingdom (56%) and the United States (52%).

EU products enjoy a strong and broadly positive image across all surveyed markets, with a notable strengthening compared with 2021

- Overall levels of agreement with positive attributes remain high, ranging from 68% for animal welfare-friendly to **83% for good quality, with 41% who totally agree**. The perceived strengths of EU products – quality, safety and taste – correspond closely to the factors that consumers consider most important when choosing food and beverage products.

- **The share of respondents who "totally agree" has increased by around 10 points compared with 2021 across most attributes**, indicating a consolidation and strengthening of the reputational capital associated with European agricultural products. Perceptions are particularly strong in China, Thailand and Indonesia, but somewhat more moderate in Japan.

Awareness of EU quality labels has increased significantly, but understanding remains partial

- The share of consumers who both recognise EU labels and understand their meaning has **risen from 14–22% in 2021 to 24–33% today**. The European Organic Product label is the most widely recognised (33%), followed by the PGI label (27%) and the 'Enjoy It's from Europe' label (26%). However, around 30% of consumers have seen EU labels without knowing what they represent, and **between 29% and 37% have never seen them**.

Significant untapped potential exists among both current consumers and non-consumers of EU products

- Among existing consumers, **better quality is the main factor that would encourage increased consumption (54%)**, followed by better taste (41%) and lower price (40%). Compared with 2021, quality and taste have gained importance while price has decreased slightly, suggesting a shift in consumers' priorities.

- Among respondents who do not currently consume EU products, **a clear majority (60%) express interest in starting to do so**, including 13% who say they would definitely start. This potential demand has been maintained over time compared with 2021. **India (26%), Indonesia (25%) and the United Arab Emirates (22%)** record the highest shares of respondents expressing strong purchase intention, while South Korea (5%) and Japan (1%) show much lower levels.

2. Consumption behaviour and purchase drivers

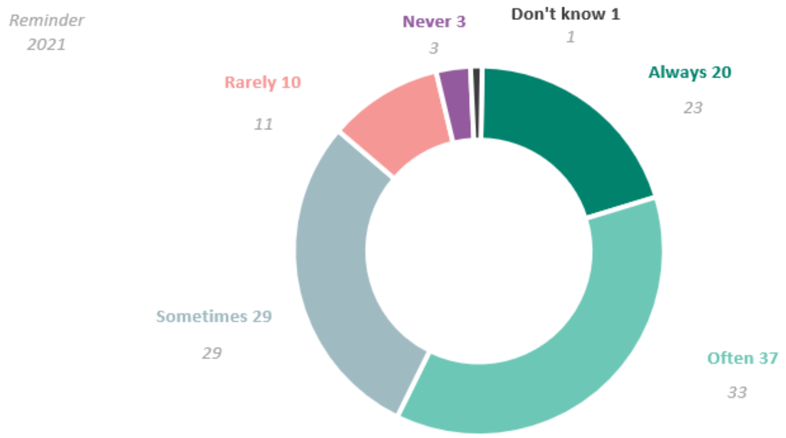
2.1 Attention to product origin

The findings from this survey confirm the importance of country of origin in purchasing decisions for agricultural, food and beverage products.

Nearly six in ten consumers (57%) say they always or often check the country or region of origin of the products they buy, including one in five who report doing so systematically. **This proportion is consistent with the level measured in 2021 (56%), confirming that attention to origin is a well-established and enduring consumer habit rather than a passing trend**. In total, 86% of consumers check product origin at least sometimes.

DX1 Thinking about your usual purchases of agricultural, food or beverage products, how often do you look at the country or region of origin of the products you buy?

Base: All (%)



The practice of checking the country of origin is a bit more widespread among parents

The practice of checking the country of origin is widespread across all sociodemographic groups, though some notable differences emerge. Gender plays virtually no role, with men and women showing nearly identical levels of attention (57% and 56% respectively). Age, however, introduces a modest divide: consumers aged 30–39 are the most attentive (61% check always or often), a proportion that gradually decreases among older age groups, dropping to 50% among those aged 50–55. This pattern may reflect a heightened awareness and sensitivity to food provenance among younger generations, but it may also be linked to parenthood: consumers with children are significantly more likely to check product origin (64%, regardless of the number of children) compared to those without (47%). **The 30–39 age group, which largely overlaps with young parents, likely combines both drivers - generational awareness and a greater concern for what their family consumes.**

Attention to product origin, by socio-demographic group

Group	Always + Often	Always	Often	Sometimes	Rarely	Never
TOTAL	**57%**	**20%**	**37%**	**29%**	**10%**	**3%**
GENDER						
Male	**57%**	21%	36%	30%	9%	4%
Female	**56%**	19%	37%	29%	10%	4%
AGE						
20-29 years	**57%**	21%	36%	30%	9%	3%
30-39 years	**61%**	21%	40%	27%	9%	3%
40-49 years	**55%**	20%	35%	30%	10%	4%
50-55 years	**50%**	19%	31%	32%	13%	5%
EDUCATION (age when completed)						
16-19 years	**45%**	17%	28%	34%	14%	6%
20+ years	**60%**	21%	39%	28%	9%	3%
OCCUPATION						
Self-employed	**58%**	23%	35%	30%	9%	3%
Employee	**59%**	21%	38%	29%	9%	3%
Manual worker	**46%**	17%	29%	34%	14%	5%
Not working	**40%**	14%	26%	34%	15%	9%
TYPE OF LOCALITY						
Small/medium-sized town	**45%**	14%	31%	35%	14%	5%
Large town / city	**62%**	23%	39%	27%	8%	3%
CHILDREN UNDER 15 IN HOUSEHOLD						
No children	**47%**	16%	31%	33%	14%	5%
1 child	**64%**	21%	43%	26%	7%	3%
2 children	**64%**	24%	40%	27%	7%	2%
3+ children	**64%**	27%	37%	28%	6%	2%

It is also worth noting that consumers living in large towns or cities are more likely to check the origin of food and beverage products (62%) than those in smaller urban areas (45%), a gap that may reflect both greater exposure to international products and a wider range of available choices in larger retail environments.

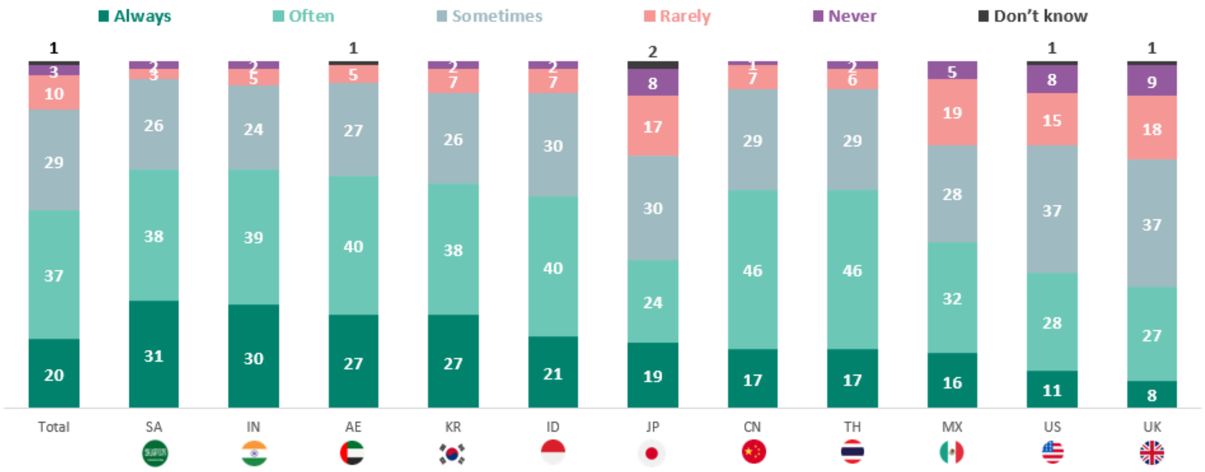
While attention to country of origin is high in many markets, it is noticeably less widespread in the United States and the United Kingdom

At the country level, significant differences emerge. Checking the origin of food and beverage products is particularly widespread in the Gulf states: Saudi Arabia stands out with the highest proportion of respondents checking origin always or often (69%, including 31% who always do so), followed closely by the United Arab Emirates (67%, including 27% always) – a pattern that may be linked to the limited domestic agricultural production in these countries, where reliance on imports makes product origin a particularly salient consideration. The practice is equally prevalent in India (69%, including 30% always) and well established in South Korea (65%, including 27% always). At the other end of the spectrum, Japan (43%), the United States (39%) and the United Kingdom (35%) are characterised by a notably lower propensity to check product origin, with the UK recording the lowest share of systematic checkers across all surveyed countries (8%

always). China, Thailand, Indonesia and Mexico occupy an intermediate position, with always-or-often rates ranging from 48% to 63%.

DX1 Thinking about your usual purchases of agricultural, food or beverage products, how often do you look at the country or region of origin of the products you buy?

Base: All (%)



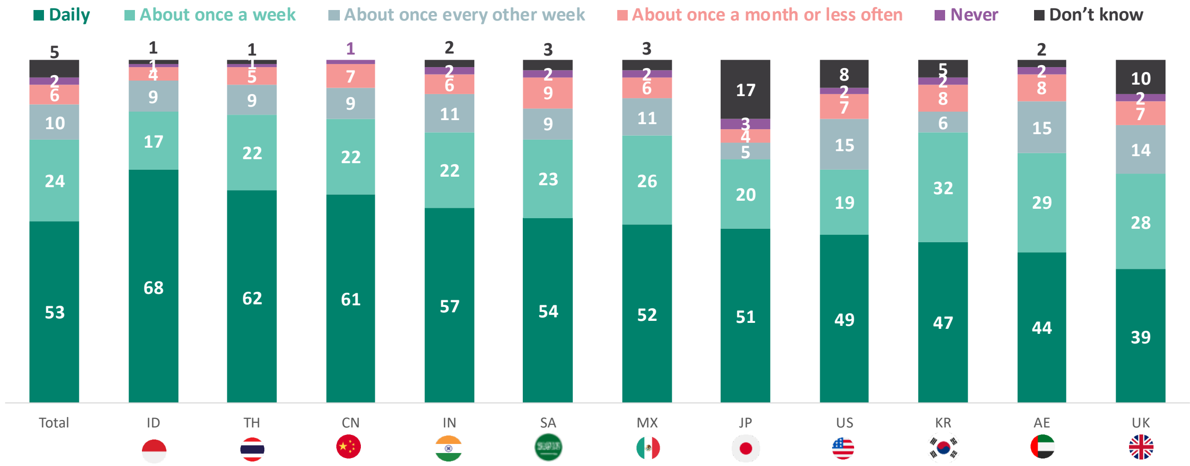
2.2 Frequency and origin of food consumption

With 40% of consumers reporting weekly consumption, European products are part of regular purchasing habits, although they remain secondary to local products

Unsurprisingly, the proportion of consumers reporting regular consumption of agricultural, food and beverage products from their own country or region is very high, with more than three quarters (77%) doing so on a daily or weekly basis - including over half (53%) who consume local products every day. This proportion is consistently high across all countries surveyed, ranging from 67% in the United Kingdom to 85% in Indonesia. While this proportion is consistently high across all countries surveyed, the share of daily consumers varies noticeably - from 39% in the United Kingdom and 44% in the United Arab Emirates to 68% in Indonesia and 62% in Thailand.

Q1_1 How often do you consume products agricultural, food or beverage products from... ? **Your region or country**

Base: All (%)



European products benefit from a genuine foothold in the consumption habits of the surveyed countries: overall, 40% of consumers report consuming EU agricultural, food and beverage products at least once a week (35% in 2021), including a core base of 13% who do so on a daily basis, (11% in 2021). This level of penetration is close to, albeit slightly higher than, that recorded for non-EU foreign products (37% weekly, 12% daily). European products thus broadly match other imported goods in terms of consumption frequency.

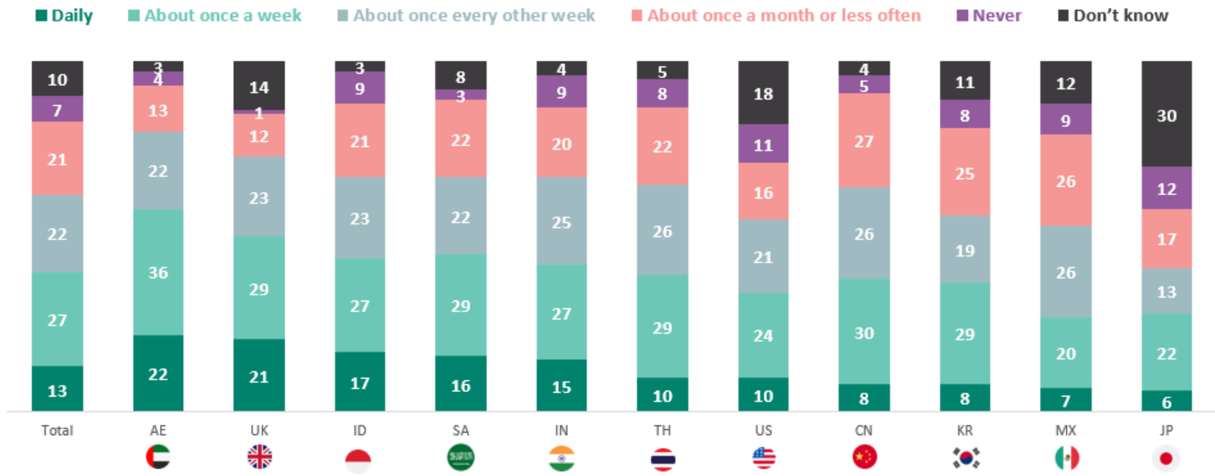
The United Arab Emirates and the United Kingdom stand out with the highest levels of weekly consumption of European products, a pattern that holds consistently across product categories

This overall parity masks contrasting positions across markets. Regular consumption of EU agricultural, food and beverage products appears particularly pronounced in the Gulf countries. The United Arab Emirates stands out with the highest proportion of weekly consumers: 58% of respondents report consuming EU products at least once a week, including 22% who do so on a daily basis.

A similar pattern, though slightly less marked, can be observed in Saudi Arabia, where 45% of consumers report weekly consumption and 16% daily consumption. This tendency may partly reflect the relatively limited domestic agricultural production in these countries, which increases reliance on imported food products, as well as the geographical proximity between the Gulf region and Europe. The United Kingdom also emerges as a key market for European products, with the second highest proportion of regular consumers. Half of British consumers (50%) report consuming EU agricultural, food and beverage products at least once a week, including 21% who do so daily. This relatively strong presence of European products may be linked both to geographical proximity to continental Europe and to the country's historical integration within the European single market. By contrast, the consumption of EU products appears more limited in some markets. In Mexico, only 27% of consumers report consuming EU agricultural, food and beverage products at least once a week, including 7% who do so daily. Similarly, in Japan, weekly consumption reaches 28%, with only 6% of consumers reporting daily consumption.

Q1_2 How often do you consume products agricultural, food or beverage products from...? **Countries in the European Union**

Base: All (%)

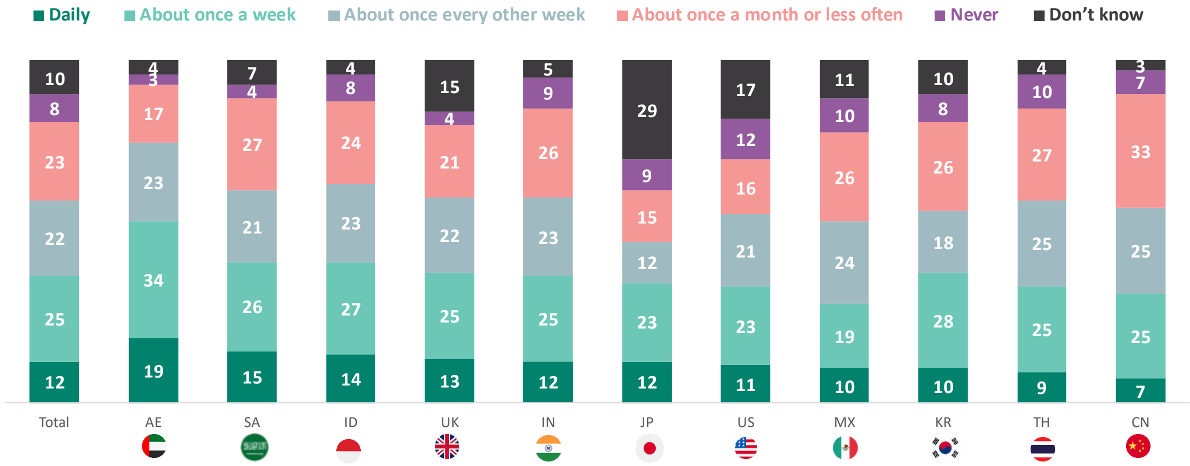


Distinct market profiles in the consumption of EU and other imported food products

It is also worth noting that Japan stands out for the relatively limited penetration of EU products in its consumption patterns. While the country does not display particularly high levels of weekly consumption of foreign products originating from outside the EU (35%, including 12% daily consumers), this proportion nevertheless remains higher than that observed for EU products, as noted previously (28%, including 6% daily). This suggests that, although imported products are present in the Japanese market, EU products appear to be comparatively less established within these consumption habits. Mexico, which was identified earlier as one of the countries with the lowest proportions of consumers of EU products, displays a similar pattern when it comes to foreign products originating from outside the EU. Only 29% of consumers report consuming such products at least once a week (including 10% daily), suggesting that the Mexican market may simply be less oriented towards imported food products overall. By contrast, the Gulf countries – which were previously identified as markets with particularly high levels of consumption of EU products – also display high levels of consumption of foreign products from outside the EU. This is especially the case in the United Arab Emirates, where consumption levels are high for both EU and non-EU foreign products, although EU products retain a slight advantage (58% versus 53% weekly consumers). A similar pattern can be observed in Saudi Arabia (45% versus 41%), reflecting the strong reliance of these markets on imported food products. The United Kingdom presents a somewhat different configuration. While the country records one of the highest proportions of regular consumers of EU products (50%, including 21% daily), the consumption of non-EU foreign products is noticeably lower (38%). This suggests that the British market may display a comparatively stronger orientation towards European products, possibly reflecting geographical proximity as well as the long-standing integration of the United Kingdom within the European single market prior to Brexit.

Q1_3 How often do you consume products agricultural, food or beverage products from... ? **Countries outside the European Union**

Base: All (%)



Taken together, these findings reveal several distinct market configurations depending on the role of imported products and the relative positioning of EU products within these imports. The United Arab Emirates and the United Kingdom stand out as highly open markets: weekly consumption of EU products reaches 58% and 50% respectively, well above the sample average (40%), and EU products also enjoy a clear advantage over other imported origins. A second group of markets – including Saudi Arabia, Indonesia and India – also shows relatively high levels of EU product consumption (45%, 44% and 42%), but without a clear competitive advantage over non-EU imported products.

By contrast, Mexico and China appear more strongly oriented towards domestic products, with significantly lower levels of imported product consumption overall. Finally, Japan and South Korea display a different configuration, where non-EU imported products are consumed more frequently than

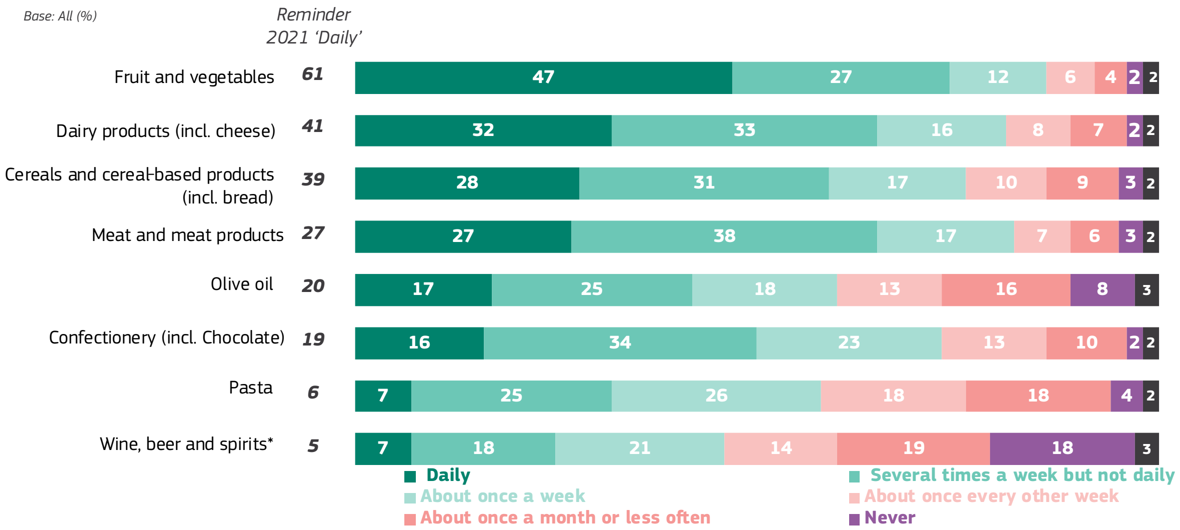
EU products, suggesting a comparatively weaker position for European products in these markets.

2.3 Types of products consumed

Marked differences in consumption frequency across food categories

Quite logically, the frequency of consumption of food products varies significantly across categories. Nearly half of consumers report eating fruit and vegetables every day (47%), and almost three quarters consume them at least once a week (74%), making them the most frequently consumed product category. Dairy products are also consumed very regularly, with around one third of consumers reporting daily consumption (32%) and nearly two thirds consuming them at least once a week (65%). Cereals and cereal-based products, including bread, also occupy an important place in eating habits, with more than a quarter of consumers reporting daily consumption (28%) and close to six in ten consuming them at least once a week (59%). Meat and meat products show a fairly similar pattern, with slightly more than a quarter of consumers reporting daily consumption (27%) and almost two thirds consuming them weekly or more often (65%). Other categories appear to be consumed more occasionally. This is particularly the case for olive oil and confectionery products, including chocolate, which are consumed daily by 17% and 16% of consumers respectively, and by 42% and 50% at least once a week. Finally, some categories such as pasta and alcoholic beverages are characterised by lower levels of daily consumption. Only 7% of consumers report eating pasta every day (32% at least once a week), while the same proportion report daily consumption of wine, beer or spirits (7%), with around a quarter consuming these beverages at least once a week (25%). The 2021 reminder figures suggest that daily consumption was higher in the previous wave for most product categories, particularly fruit and vegetables, dairy products, cereals and cereal-based products, olive oil and confectionery products. Meat consumption appears stable, while pasta and wine, beer and spirits show slightly higher daily consumption levels in 2026. These differences should be interpreted cautiously given the methodological changes between the two waves.

Q2 How often do you consume products from each of these categories?



Overall, socio-demographic differences in consumption frequency across product categories remain relatively limited. **One of the most notable variations, however, relates to the presence of children in the household. Households with children tend to report more frequent consumption of several food categories, particularly dairy products, cereals and pasta, but also confectionery and chocolate products**. This pattern suggests that the presence of children is associated with more structured eating routines and a higher frequency of consumption for certain product categories, especially those linked to family meals or children's dietary habits.

Food consumption patterns vary widely across countries

Quite logically, the frequency of consumption by category varies considerably from one country to another. While fruit and vegetables are consumed weekly by more than six in ten consumers in all of the countries surveyed, more pronounced differences appear for certain categories such as dairy products and meat. Weekly consumption of dairy products ranges from 49% in Japan to 77% in Saudi Arabia, while meat consumption varies even more widely, from 39% in India to 80% in Thailand. Other categories also show substantial cross-country differences. For example, cereals and cereal-based products remain widely consumed in most markets but are significantly less common in Japan (30%). Finally, categories such as olive oil and pasta display particularly contrasted consumption patterns across countries, reflecting differences in national dietary habits and culinary traditions.

Q2 How often do you consume products from each of these categories? **'Daily' + 'Several times a week but not daily'**

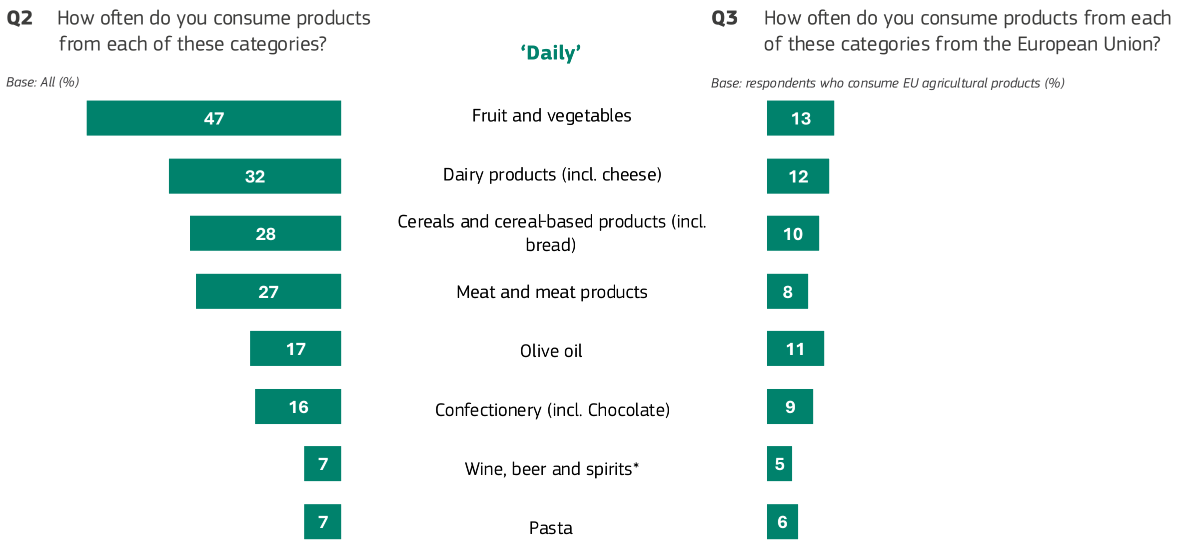
Base: All (%)

	Total	China	India	Indonesia	Japan	Mexico	Saudi Arabia	South Korea	Thailand	UAE	United Kingdom	USA
Fruit and vegetables	74	81	76	81	63	76	79	67	77	80	68	68
Dairy products (incl. cheese)	65	65	70	66	49	66	77	50	61	74	65	67
Meat and meat products	65	77	39	63	68	67	67	60	80	67	62	67
Cereals and cereal-based products (incl. bread)	59	66	57	61	30	61	73	62	61	65	59	53
Confectionery (incl. chocolate)	50	39	49	61	50	37	61	49	60	56	49	39
Olive oil	42	36	40	33	20	49	66	42	27	62	36	43
Pasta	32	20	30	34	14	43	49	20	24	44	31	38
Wine, beer and spirits*	25	26	26	17	21	21	n/a	29	27	n/a	25	32

Overall food consumption varies widely across categories, while EU product consumption remains more balanced

Whereas the frequency of consumption varies substantially across product categories in general, differences appear more limited when considering European products specifically. Looking at daily consumption, the proportion of consumers ranges from 7% for pasta and wine, beer and spirits to 47% for fruit and vegetables across all products. By contrast, daily consumption of EU products varies within a much narrower range, from 5% to 13% depending on the category.

This narrower range reflects the fact that EU-origin products generally account for only a share of total consumption within each category. Overall consumption patterns are primarily shaped by dietary habits and national food cultures, whereas the consumption of EU-origin products also depends on product availability, trade flows, distribution channels, and competition both from domestic products and from imports originating outside the EU. As a result, EU product consumption appears more evenly distributed across categories than overall food consumption.



(*) This item was not asked in Saudi Arabia and the United Arab Emirates, and in the United States it was asked only among respondents aged 21 and over.

Markets with higher EU product penetration show stronger consumption across categories

Overall, when focusing on respondents who report consuming European products, the hierarchy of product categories remains broadly similar across countries, with fruit and vegetables and dairy products generally among the most frequently consumed categories. However, the intensity of consumption varies significantly between markets and appears closely linked to the overall level of EU product consumption in each country. In markets where the proportion of consumers reporting weekly consumption of EU products is relatively high, EU products also tend to be consumed across a wide range of categories. This is particularly the case in the United Arab Emirates, where weekly consumption among EU product consumers ranges from 39% for pasta to 54% for fruit and vegetables, and in Saudi Arabia, where between 38% and 50% of consumers report consuming

EU products weekly depending on the category. In these markets, EU products therefore appear both widely consumed and present across multiple food categories. By contrast, in countries where the overall penetration of EU products is lower, consumption levels tend to remain more limited across most categories. Japan illustrates this pattern particularly clearly: even among respondents who report consuming EU products, weekly consumption generally remains below 16% depending on the category, including 8% for fruit and vegetables and cereals, 9% for pasta, 10% for confectionery and meat, and 12% for dairy products. While the overall hierarchy of categories remains relatively consistent across markets, a few country-specific patterns can nevertheless be observed. For example, Thailand records comparatively higher consumption of confectionery (39%), while Indonesia shows particularly high levels for dairy products (48%). These differences remain relatively moderate, however, suggesting that cross-country variations are driven primarily by the overall penetration of EU products rather than by strong category-specific preferences.

Q3 How often do you consume products from each of these categories from the EU? **'Daily' + 'Several times a week but not daily'**

Base: respondents who consume EU agricultural products (%)

	Total	China	India	Indonesia	Japan	Mexico	Saudi Arabia	South Korea	Thailand	UAE	United Kingdom	USA
Fruit and vegetables	34	23	38	41	8	24	45	18	37	54	43	25
Dairy products (incl. cheese)	34	26	35	48	12	23	49	23	37	51	33	28
Olive oil	30	23	33	28	16	27	42	30	25	43	29	30
Cereals and cereal-based products (incl. bread)	31	21	35	43	8	22	43	21	33	44	30	23
Confectionery (incl. chocolate)	31	21	35	39	10	21	50	21	39	46	27	22
Meat and meat products	28	22	22	32	10	20	39	20	32	42	31	26
Pasta	25	16	27	29	9	21	38	17	24	39	23	21
Wine, beer and spirits*	19	18	21	18	8	17	n/a	19	23	n/a	21	23

(*) Wine, beer and spirits: not asked in Saudi Arabia and the UAE, and in the USA asked only among respondents aged 21 and over.

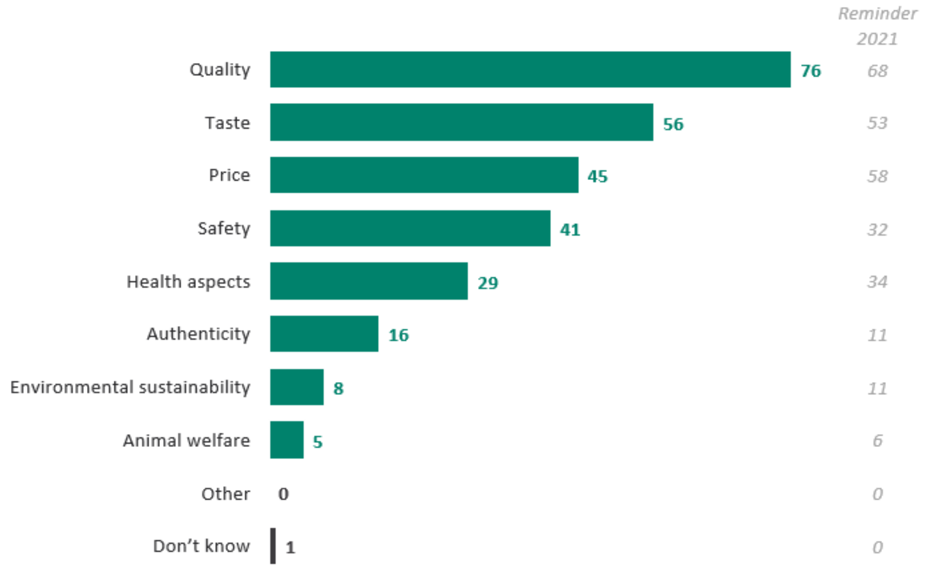
2.4 Purchase decision factors

Quality clearly dominates food purchasing decisions

The analysis of purchasing drivers shows that **quality clearly emerges as the most important criterion when consumers buy agricultural, food or beverage products.** More than three quarters of respondents (76%) cite quality as one of the factors influencing their purchasing decision. Taste (56%), price (45%) and safety (41%) are the other most frequently mentioned criteria. Quality stands out clearly as the leading factor, although it should be noted that respondents were able to select up to three items, which naturally increases the likelihood that key attributes such as quality are widely cited. Although comparisons with the 2021 Flash survey conducted by Ipsos should be interpreted with caution due to methodological differences, some trends can nevertheless be highlighted. In particular, **the importance of quality and safety appears to have increased markedly since 2021, while price is cited less frequently than in the previous wave**. Finally, factors related to broader ethical or sustainability considerations remain much less central in consumers' purchasing decisions. Environmental sustainability is mentioned by only 8% of respondents and animal welfare by just 5%, meaning that fewer than one in ten consumers refer to these aspects when explaining what influences their choice of food or beverage products

Q4 When purchasing agricultural, food or beverages, which of the following most influence your decision to buy a product?

Base: All (%)



At country level, significant differences emerge across several purchasing drivers. Food safety, for instance, is cited by a particularly large proportion of consumers in China (65%) and Thailand (64%), where it appears almost as influential as quality in shaping purchasing decisions. Similarly, safety considerations are also relatively prominent in Japan (56%) and South Korea (46%), suggesting that concerns related to food safety and product reliability play a particularly important role in several Asian markets.

Ethical and sustainability-related criteria remain secondary across markets, but the United Kingdom is noteworthy in this respect. Despite the urban target group aged 20 to 55, only 8% of respondents in the UK mention environmental sustainability and 13% mention animal welfare as factors influencing their purchasing decisions. While the UK result for animal welfare is comparatively higher than in most other markets, both criteria remain far behind quality, taste, price and safety, suggesting that they rarely rank among the top purchasing drivers.

Other drivers also show notable geographical contrasts. Price appears especially important in Japan (54%), Mexico (52%), South Korea (52%), the United States (52%) and the United Kingdom (56%), whereas it is cited far less frequently in China (27%) and India (27%). Conversely, health-related aspects are particularly salient in India (50%), China (44%) and Indonesia (42%), indicating stronger attention to nutritional considerations in these markets.

Overall, while quality remains the dominant purchasing criterion across all countries, these results highlight the **existence of distinct national profiles, with some markets placing greater emphasis on safety, others on price or health-related aspects.**

Q4 When purchasing agricultural, food or beverages, which of the following most influence your decision to buy a product?

Base: All (%)

	Total	China	India	Indonesia	Japan	Mexico	Saudi Arabia	South Korea	Thailand	UAE	United Kingdom	USA
Quality	76	68	87	85	53	85	86	65	81	83	69	71
Taste	56	42	47	47	53	69	63	63	49	57	63	67
Price	45	27	27	42	54	52	48	52	39	43	56	52
Safety	41	65	41	34	56	17	38	46	64	40	21	28
Health aspects	29	44	50	42	7	27	31	20	19	35	18	21
Authenticity	16	24	22	26	17	12	10	4	18	13	16	18
Environmental sustainability	8	9	13	10	2	8	8	4	12	11	8	7
Animal welfare	5	8	5	3	1	5	4	4	5	4	13	5

Socio-demographic differences in the criteria influencing purchasing decisions remain relatively limited overall, although some patterns can be observed. In particular, the presence of children in the household appears to influence the hierarchy of purchasing drivers. **Households with children tend to refer more frequently to criteria related to quality, safety and health aspects**. For instance, quality is cited by 81% of respondents with two children and 80% of those with three or more children, compared with 70% among respondents without children. Similarly, health aspects are mentioned by 35% of respondents with two children, compared with 22% among those without children. By contrast, price tends to be mentioned more frequently by respondents without children (52%) than by those with one or two children (40% and 39%). These findings suggest that households with children place greater emphasis on food quality and reassurance-related aspects when making purchasing decisions.

3. Perception of EU products and awareness of quality labels

3.1 Image of EU food products

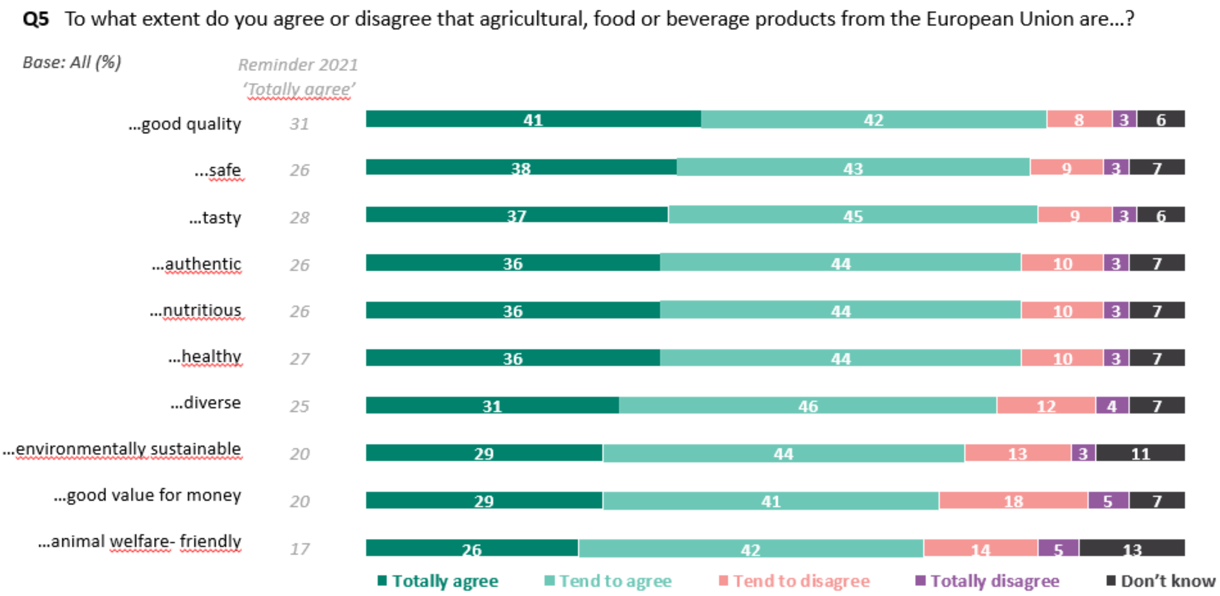
The image of European agricultural, food and beverage products is broadly positive across surveyed markets, although the strength of this perception varies by attribute and by country.

Overall levels of agreement remain high across all the attributes tested, ranging from 68% for animal welfare-friendly to 83% for good quality. This relatively narrow range suggests that European products benefit from a broadly positive and consistent image across dimensions, with no attribute standing out as significantly weaker than the others. Beyond these high overall levels of agreement, the strength of this perception is also reflected in the sizeable share of respondents who “totally agree” with these statements. For all attributes tested, the proportion of respondents who fully agree is never below one quarter of consumers and often exceeds one third. This is particularly the case for quality, for which 41% of respondents totally agree that EU products are of good quality.

This result is especially noteworthy as quality also emerges, as previously observed, as the primary driver of purchasing decisions.

More broadly, the attributes most strongly associated with EU products largely mirror the criteria most frequently cited as influencing purchasing decisions. Characteristics such as quality, safety and taste - which rank among the top purchasing drivers- are also among the most widely endorsed image attributes. This alignment suggests that the perceived strengths of EU products correspond closely to the factors that consumers consider most important when choosing food and beverage products.

Finally, although comparisons with the 2021 Flash Eurobarometer conducted by Ipsos should be interpreted with caution, the results nevertheless point to a noticeable strengthening of perceptions over time. **Across most attributes, the share of respondents who “totally agree” has increased by around 10 percentage points compared with 2021.** This trend indicates a consolidation, and even a strengthening, of the reputational capital associated with European agricultural products in international markets.



Socio-demographic differences in the perception of EU products remain relatively limited overall. However, as already highlighted earlier in the analysis, households with children tend to express a more positive image of European agricultural products across several attributes. Respondents with two or more children in particular report higher levels of agreement with statements related to quality, safety and health aspects. This finding is especially noteworthy as these same profiles had previously been identified as placing greater importance on these criteria when making purchasing decisions. In other words, the consumers who value these dimensions the most are also those who most strongly associate them with European products, suggesting that EU agricultural products may benefit from particularly strong potential among these consumer segments.

Perceptions of European agricultural, food and beverage products are positive across all surveyed countries.

Across markets, large majorities of respondents agree with the positive attributes associated with EU products, confirming the strong reputational base of European food products internationally. However, differences in intensity reveal meaningful variations between markets. China, Thailand and Indonesia display some of the strongest perceptions across most attributes, with consistently high levels of agreement. In China, for example, more than nine in ten respondents agree that European products are of good quality (91%), safe (91%) and healthy (91%). Similarly strong perceptions can be observed in Thailand, where agreement levels reach 92% for good quality, 90% for safety and 91% for attributes such as authenticity, nutritional value and healthiness. Indonesia also records very high levels of agreement across most attributes, with around 85–90% of respondents associating European products with positive characteristics such as quality, taste and authenticity. Perceptions are also very favourable in Saudi Arabia and the United Arab Emirates, where large majorities of respondents associate European products with quality, taste and authenticity. In these markets, agreement levels typically range between 80% and nearly 90%, confirming a strong and broadly positive image of European food products. By contrast, perceptions appear somewhat more moderate in a few markets. This is particularly the case in Japan, where agreement levels are consistently lower across most attributes—for example 66% for good quality, 59% for nutritious and 51% for animal welfare-friendly. While still largely positive, these results indicate a comparatively more reserved perception of European products. Perceptions are also slightly less strong in Mexico and, to a lesser extent, in the United States, although majorities of respondents still associate European products with most positive attributes. **Overall, these findings highlight a broadly positive and widely shared perception of European agricultural**

products across markets, with particularly strong reputational capital in several Asian and Gulf countries, while a few markets such as Japan display somewhat more moderate levels of agreement.

Q5 To what extent do you agree or disagree that agricultural, food or beverage products from the European Union are...? **'Totally agree' + 'Tend to agree'**

Base: All (%)

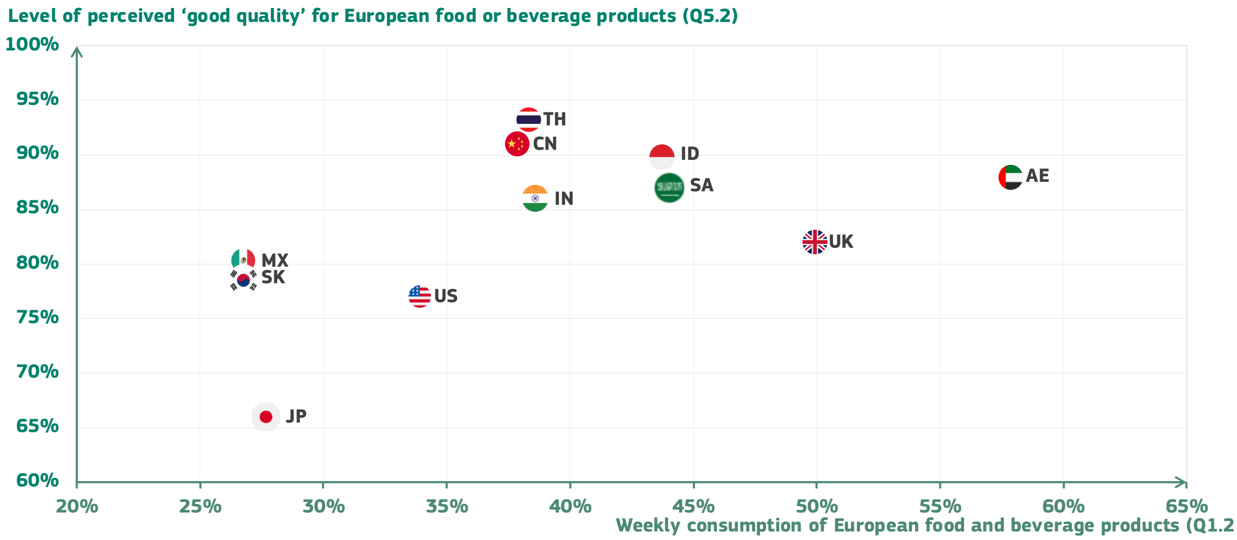
	Total	China	India	Indonesia	Japan	Mexico	Saudi Arabia	South Korea	Thailand	UAE	United Kingdom	USA
Good quality	83	91	85	90	66	80	86	79	92	88	82	77
Safe	81	91	82	85	68	74	81	75	90	85	82	76
Tasty	82	87	84	88	70	76	88	77	90	87	83	77
Authentic	80	89	80	87	67	72	83	74	91	83	79	76
Nutritious	80	90	82	87	59	76	84	71	91	84	81	75
Healthy	80	91	82	87	59	75	81	74	91	83	79	75
Diverse	77	81	76	83	66	71	84	76	88	80	73	70
Environmentally sustainable	73	84	79	81	60	66	71	68	82	78	67	65
Good value for money	70	58	75	57	61	65	75	72	82	77	75	66
Animal welfare-friendly	68	78	72	77	51	65	62	66	84	71	66	60

Perceptions of European products and their consumption vary significantly across markets

We analyse the positioning of the different markets along two key dimensions: the perception of the quality of European products and the frequency of their consumption. This comparison reveals several distinct market profiles.

First, some markets combine very strong perceptions and relatively high consumption levels, indicating that the positive image of EU products effectively translates into purchasing behaviour. This is particularly the case in the United Arab Emirates, which stands out with both high perceived quality and the highest share of weekly consumers, and in the United Kingdom, where strong perceptions are also associated with regular consumption. A second group of countries - including China, Thailand, India, Indonesia and Saudi Arabia - displays very strong perceptions of European product quality, often close to or above 90% in China and Thailand, but with somewhat more moderate levels of consumption. These markets appear as markets of expansion, where the reputation of European products is already well established and could support further growth in consumption.

Finally, Japan stands out as the most distinct case, combining both lower perceptions of European product quality (66%) and comparatively low levels of consumption. This suggests that structural factors - such as strong domestic food traditions, established local supply chains or price considerations - may limit the penetration of European products in this market.



The perceived value for money of EU products remains a relatively weak point, creating a gap with the importance consumers attach to price

While European products benefit from a very favourable image on their core attributes, including quality, taste, safety and authenticity, the perception of their value for money stands out as a notable point of tension. "Good value for money" ranks among the attributes least strongly associated with EU products: 70% of respondents agree with this characteristic (compared to 65% in 2021), a level that, while still representing a clear majority, falls significantly below the scores recorded for quality (83%), taste (82%) or safety (81%). Only animal welfare-friendliness (68%) receives a lower level of endorsement. Yet, at the same time, price is the third most frequently cited purchasing criterion when consumers buy food and beverage products (45%), and the third most mentioned lever that could encourage existing consumers to increase their consumption of European products (40%). In other words, price weighs in purchasing decisions, but the perception of the price competitiveness of European products lags behind their image on other dimensions.

This gap is particularly pronounced in certain markets. In China, only 58% of respondents consider that EU products offer good value for money, the lowest level across all countries surveyed, even though the perceived quality of European products is among the highest (91%). A comparable disconnect can be observed in Indonesia (57%), where perceived quality nevertheless reaches 90%.

By contrast, Thailand (82%) and the United Kingdom (75%) display a notably more favourable perception of value for money. It is also significant that the markets in which price is most frequently cited as a purchasing criterion, namely Japan (54%), the United Kingdom (56%) and the United States (52%), are also those where the perceived value for money of EU products remains relatively moderate (61%, 75% and 66% respectively), suggesting that price competitiveness may act as a structural barrier to the growth of European product consumption in these markets.

This finding points to two distinct types of levers for developing the consumption of EU products. In markets where the perception of value for money is already favourable, such as Thailand or the United Kingdom, promotional efforts can continue to build on quality and authenticity attributes. By contrast, in markets where

this gap is most pronounced, particularly China, Indonesia and, to a lesser extent, Japan, more explicit communication about the added value of European products, linked to their quality and safety guarantees, could help to narrow this perception gap.

Perception of EU products as "good value for money", by country

Country	Totally agree	Tend to agree	TOTAL AGREE	Tend to disagree	Totally disagree	TOTAL DISAGREE	Price as criterion (Q4)	Value/price gap
Total	29%	41%	70%	18%	5%	23%	45%	+25 pp
China (CN)	23%	35%	58%	31%	9%	40%	27%	+31 pp
India (IN)	38%	37%	75%	14%	5%	19%	27%	+48 pp
Indonesia (ID)	29%	28%	57%	27%	12%	39%	42%	+15 pp
Japan (JP)	12%	49%	61%	18%	3%	21%	54%	+7 pp
Mexico (MX)	29%	36%	65%	21%	8%	29%	52%	+13 pp
Saudi Arabia (SA)	40%	35%	75%	16%	6%	22%	48%	+27 pp
South Korea (KR)	13%	59%	72%	19%	2%	21%	52%	+20 pp
Thailand (TH)	39%	43%	82%	13%	2%	15%	39%	+43 pp
UAE (AE)	40%	37%	77%	15%	5%	20%	43%	+34 pp
United Kingdom (UK)	25%	50%	75%	13%	4%	17%	56%	+19 pp
United States (US)	29%	37%	66%	15%	4%	19%	52%	+14 pp

3.2 Awareness and understanding of European quality labels

Awareness and understanding of EU quality labels have increased significantly compared to 2021.

The share of consumers who both recognise EU labels and understand their meaning has risen from 14%–22% in 2021 to 24%–33% today, meaning that around one quarter to one third of consumers now recognise the labels and know what they refer to.

More broadly, EU labels have achieved a solid level of visibility across international markets. More than half of consumers report having at least seen the logos, even if they do not always clearly understand what they represent. Around 30% of consumers say they have seen EU quality logos but do not clearly know what they refer to, while a substantial share (between 29% and 37% depending on the label) claim they have never seen them. Overall, awareness levels are similar across most EU quality schemes.

Among them, the **European Organic Product label** stands out as the most widely recognised, with 33% of consumers reporting that they have seen the logo and know what it represents, compared to 22% in 2021. Slightly less than three in ten respondents (29%) report that they have never seen the label before, while 8% answer that they do not know. The increasing awareness and understanding compared to 2021 reflects the broader global visibility of organic certifications schemes and the growing consumer interest in organic and environmentally friendly food products.

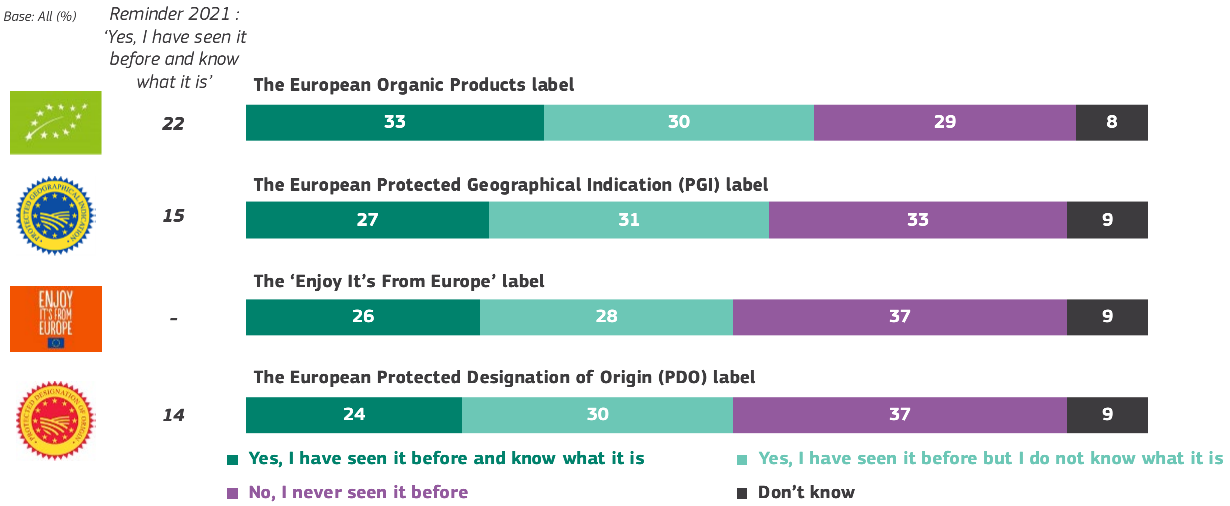
At country level, recognition of the European Organic Products label is highest in Indonesia (44%), the United Arab Emirates (43%), India (42%), China (41%). In contrast, familiarity remains considerably lower in Japan (11%), as well as in South Korea (22%), Mexico (25%) and the United States (26%).

The next most recognised understood label is the **European Protected Geographical Indication (PGI) label** (27%). In addition, 31% say they have seen the label before but did not clearly understand its meaning. One third of consumers (33%) report that they have never seen the PGI label before, while 9% say they do not know.

Recognition varies significantly across countries. The highest levels of awareness are observed in India (40%), Indonesia (37%) and Thailand (37%), while familiarity remains quite low in South Korea (17%) and in Japan (9%).

The **'Enjoy It's from Europe' label** is recognized and understood by 26% of respondents. A further 28% report that they have seen the logo before but do not know what it represents. Meanwhile, 37% say they have never seen the label before and 9% respond that they do not know. Despite being a relatively recent initiative, the 'Enjoy, it's from Europe' label appears to be gaining traction particularly well in India, Indonesia and Thailand, suggesting effective international outreach in high-growth markets.

Q7 Have you ever seen the labels displayed below?



Despite this relatively limited overall visibility, the label appears to perform better in certain markets. Awareness is highest in India (37%), Thailand (36%) and the United Arab Emirates (36%). South Korea and Japan also have the lowest level for this label (17% and 8%).

While the European Organic Product label, the Protected Geographical Indication (PGI) and 'Enjoy it's from Europe' labels are quite familiar for respondents, **the Protected Designation of Origin (PDO)** remains slightly less recognised (24%), although this still represents a clear improvement compared to 2021 (14%).

Socio-demographic differences remain relatively limited overall, but a pattern already observed earlier in the analysis appears again: households with children tend to show a better knowledge of EU quality logos.

Respondents with two or more children are more likely to report having seen these labels and understanding what they represent. This finding confirms the profile previously identified of consumers who are more attentive to food-related issues and more involved in purchasing decisions, and who therefore appear more familiar with EU labelling schemes.

These findings suggest that EU quality labels have made measurable progress in terms of international visibility since 2021, with recognition levels increasing across several labels compared to the previous wave of the survey. However, comparisons with 2021 results remain uneven across indicators and could be further developed to provide a clearer picture of trends over time.

While recognition levels continue to improve overall, some country results appear to diverge from expected patterns. For example, awareness remains relatively low in the United Kingdom despite its long-standing exposure to EU geographical indications and organic labelling schemes, whereas significantly higher levels are observed in some non-EU markets such as Thailand.

Overall, the findings indicate further potential to strengthen consumers' understanding of the specific meaning of EU quality labels.

Q7 Have you ever seen the labels displayed below? **'Yes, I have seen it before and know what it is'**

Base: All (%)

	Total	China	India	Indonesia	Japan	Mexico	Saudi Arabia	South Korea	Thailand	UAE	United Kingdom	USA
The European Organic Products label	33	41	42	44	11	25	41	22	41	43	28	26
The European Protected Geographical Indication (PGI) label	27	33	40	37	9	21	30	17	37	33	21	23
The 'Enjoy It's From Europe' label	26	24	37	34	8	22	29	17	36	36	20	20
The European Protected Designation of Origin (PDO) label	24	31	33	33	8	20	25	16	35	28	19	19

4. Untapped potential

4.1 Drivers to increase consumption among existing consumers

Quality remains the key lever to increase consumption of EU products

The findings from this survey further confirm the central role played by quality in shaping consumers' relationship with EU agricultural, food and beverage products. Among respondents who already consume EU products, better quality is the main factor that would encourage them to increase their consumption (54%).

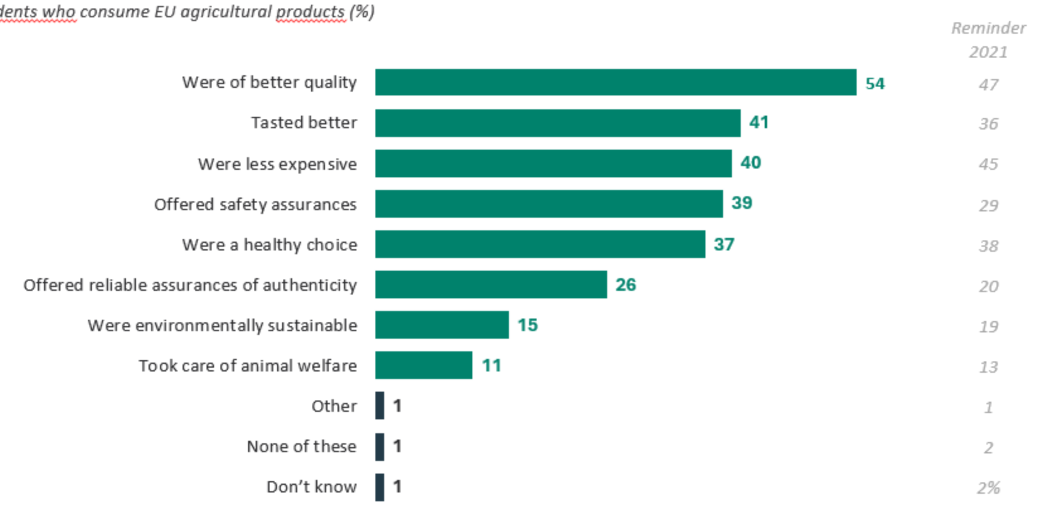
These results should be read in connection with the main purchasing drivers identified earlier in the report. Quality, taste and price are not only among the leading criteria shaping food purchasing decisions overall; they are also the main dimensions on which existing consumers expect improvements in order to increase their consumption of EU products. Better quality is the leading lever, mentioned by 54% of existing EU product consumers, followed by better taste (41%) and lower price (40%).

For comparison, in 2021 quality was mentioned by 47% of respondents, taste by 36%, and price by 45%. These results suggest a shift in consumers' priorities: while price remains an important factor, it appears to be slightly less decisive than before, whereas quality and taste have gained importance.

The preference for quality as a primary driver appears relatively consistent across socio-demographic groups. Gender plays only a limited role, with 57% of men and 51% of women considering it important. Differences related to education level are also relatively modest: 50% of respondents who finished their education between the ages of 16 and 19 consider quality a key factor, compared with 55% among those who studied for 20 years or more. Occupation introduces slightly more variation, with employees more likely to prioritise quality (55%) than manual workers (43%). Other purchasing drivers show some socio-demographic differences. Price, for instance, is a more significant concern among non-workers (51%) than among employees (39%). By contrast, taste appears to be a widely shared criterion, with very similar levels across socio-demographic categories.

Q6a Would you be interested in consuming more agricultural, food or beverage products from the European Union if these products...?

Base: respondents who consume EU agricultural products (%)



The importance of quality as a driver varies across markets

At the country level, clear differences in priorities emerge. Indonesia and Saudi Arabia show the highest concern for product quality, with 73% and 71% of respondents, respectively, citing it as a key factor. In contrast, some countries place less emphasis on quality: Japan (43%), USA (41%), UK (38%), and Mexico (36%), where price appears to be a stronger motivator. Other countries, including China, India, South Korea, Thailand, and UAE, fall in the middle range, with 53% to 59% of respondents prioritizing quality. Overall, while quality is generally the most important factor for consuming more EU products, price tends to play a stronger role in several markets, including Indonesia, Mexico, Thailand and the UK.

Q6a Would you be interested in consuming more agricultural, food or beverage products from the European Union if these products...?

Base: respondents who consume EU agricultural products (%)

	Total	China	India	Indonesia	Japan	Mexico	Saudi Arabia	South Korea	Thailand	UAE	United Kingdom	USA
Were of better quality	54	58	53	73	43	36	71	59	54	59	38	41
Tasted better	41	39	41	39	45	26	53	48	35	45	37	47
Were less expensive	40	24	30	47	47	55	37	42	40	38	41	39
Offered safety assurances	39	49	41	33	49	29	35	44	52	38	23	30
Were a healthy choice	37	49	49	42	18	30	48	16	38	46	31	33
Offered reliable assurances of authenticity	26	37	31	31	28	20	16	33	30	21	21	21
Were environmentally sustainable	15	11	24	15	7	19	13	7	16	20	17	17
Took care of animal welfare	11	11	13	7	5	14	8	9	13	10	23	12

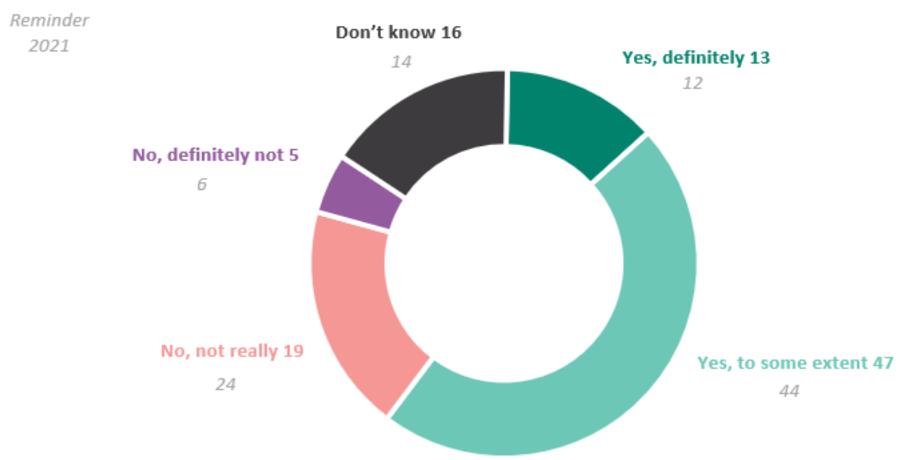
4.2 Interest among non-consumers

A substantial pool of potential new consumers for EU products

Among respondents who do not currently consume EU agricultural, food or beverage products, a clear majority express some level of interest in starting to do so. Overall, **60% say they would be interested in consuming EU products**, including 13% who say they would definitely start consuming them and 47% who say they would be interested to some extent. This result highlights a substantial pool of potential new consumers for EU products. While the share of respondents expressing a strong and immediate intention remains more limited, the relatively high proportion of respondents indicating at least some interest suggests that many non-consumers remain open to the idea of trying EU agricultural products in the future. Compared with 2021, the results remain broadly stable, indicating that this potential demand has been maintained over time, with only a small minority of respondents expressing a clear lack of interest.

Q6b Are you interested in starting to consume agricultural, food or beverage products from the European Union?

Base: respondents who do not consume EU agricultural products (%)



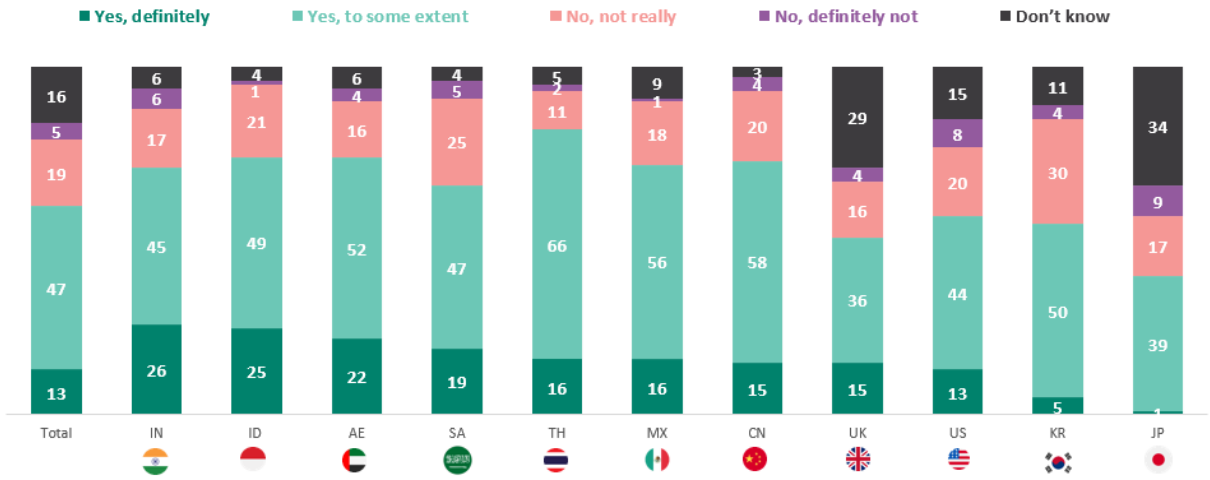
Among respondents who say they would definitely start consuming EU agricultural, food and beverage products (13%), some socio-demographic differences can be observed. Men are slightly more likely than women to express definite interest (15% vs. 11%), while age appears to play little role, with similar levels across age groups. Education has a clearer influence, with definite interest rising from 8% among those who finished education at 16–19 years to 15% among those with 20 or more years of education. Family situation also stands out, as definite interest reaches 25% among respondents with three or more children, compared with 8% among those without children, reinforcing the pattern observed earlier in the analysis that households with children tend to show greater openness towards EU products.

Strong cross-country differences in the intention to start consuming EU products

At the country level, notable differences emerge. India (26%), Indonesia (25%) and the United Arab Emirates (22%) record the highest shares of respondents stating that they would definitely start to consume EU products, meaning that more than one in five consumers express a strong intention. A second group, Thailand, Mexico, China, the United Kingdom and the United States, shows more moderate levels, ranging from 13% to 19%. By contrast, South Korea and Japan stand out with much lower levels, with 5% and 1% respectively.

Q6b Are you interested in starting to consume agricultural, food or beverage products from the European Union?

Base: respondents who do not consume EU agricultural products (%)



5. Technical specifications

Between the 4 February 2026 and 11 February 2026, Demoscopy carried out this Flash Eurobarometer at the request of the European Research Executive Agency (REA).

This Flash Eurobarometer covers a group of urban residents aged from 20-55 in 11 third countries: China, India, Indonesia, Japan, Mexico, Saudi Arabia, South Korea, Thailand, United Arab Emirates, United Kingdom, and the United States. Around 1,000 interviews were conducted per country, doubling the size from the 2021 wave (500 per country). In total, 11,119 interviews were completed via Computer Assisted Web Interviewing (CAWI).

This target group represents the core consumer segment most likely to purchase imported food and beverage products from the European Union, with greater access to international products and higher awareness of quality attributes such as safety, authenticity, and sustainability.

Number of interviews per country

	Total	11119
CN	China	1029
IN	India	1000
ID	Indonesia	1000
JP	Japan	1005
MX	Mexico	1003
SA	Saudi Arabia	1073
KR	South Korea	1002
TH	Thailand	1003
AE	United Arab Emirates	1001
UK	United Kingdom	1000
US	United States	1003

The sample structure by key socio-demographic variables is presented below. These variables include age, gender, education, occupation, urbanisation, household composition and financial difficulties. Presenting these distributions is important because the survey focuses on urban residents aged 20 to 55, a target group selected for its higher likelihood of purchasing imported agricultural, food and beverage products from the European Union.

Margin of error

Survey results are subject to sampling tolerances. The 'margin of error' quantifies uncertainty about (or confidence in) a survey result. As a general rule, the more interviews conducted (sample size), the smaller the margin of error. A sample of 500 will produce a margin of error of not more than 4.4 percentage points, and a sample of 1 000 will produce a margin of error of not more than 3.1 percentage points.

Statistical margins due to sampling tolerances
(at the 95% level of confidence)

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

	5%	10%	25%	50%	75%	90%	95%
n=50	±6.0	±8.3	±12.0	±13.9	±12.0	±8.3	±6.0
n=100	±4.3	±5.9	±8.5	±9.8	±8.5	±5.9	±4.3
n=200	±3.0	±4.2	±6.0	±6.9	±6.0	±4.2	±3.0
n=500	±1.9	±2.6	±3.8	±4.4	±3.8	±2.6	±1.9
n=1000	±1.4	±1.9	±2.7	±3.1	±2.7	±1.9	±1.4
n=1500	±1.1	±1.5	±2.2	±2.5	±2.2	±1.5	±1.1
n=2000	±1.0	±1.3	±1.9	±2.2	±1.9	±1.3	±1.0

6. Questionnaire

Interview mode: Online (CAWI)

Target population: Adults aged 20-55, urban areas

Coverage: China, India, Indonesia, Japan, Mexico, Saudi Arabia, South Korea, Thailand, United Arab Emirates, the United Kingdom, the United States of America

Fieldwork dates: 4 to 11 February 2026

Sample size: 11,119 interviews (approximately 1,000 per country)

Throughout the survey, respondents were asked about agricultural, food and beverage products, including wine, beer and spirits, fruit, vegetables, meat, dairy, chocolate, bread, pasta, and olive oil.

Socio-demographic questions covered age, gender, education, occupation, region, urbanisation, household composition and financial difficulties. The distribution of respondents across the main socio-demographic categories is presented in the technical specifications section, while detailed cross-tabulations are available in the background tables.

Q1 How often do you consume agricultural, food or beverage products from...?

(ROTATE - ONE ANSWER PER LINE)

		Daily	About once a week	About once every other week	About once a month or less often	Never	Don't know
1	Your region or country	1	2	3	4	5	6
2	Countries in the European Union	1	2	3	4	5	6
3	Countries outside the European Union	1	2	3	4	5	6

ASK ALL

Q2 How often do you consume products from each of these categories?

(ROTATE - ONE ANSWER PER LINE)

		Daily	Several times a week but not daily	About once a week	About once every other week	About once a month or less often	Never	Don't know
1	Meat and meat products	1	2	3	4	5	6	7
2	[DO NOT ASK IN UAE, IN KSA AND IF AGE(D1) <21 IN USA] Wine, beer and spirits	1	2	3	4	5	6	7
3	Fruit and vegetables	1	2	3	4	5	6	7
4	Dairy products (incl. cheese)	1	2	3	4	5	6	7
5	Confectionery (incl. chocolate)	1	2	3	4	5	6	7
6	Cereals and cereal-based products (incl. bread)	1	2	3	4	5	6	7
7	Pasta	1	2	3	4	5	6	7
8	Olive oil	1	2	3	4	5	6	7

ASK Q3 IF Q1.2=1 TO 4 (consumes agricultural, food or beverage products from countries in the EU)

Q3 **How often do you consume products from each of these categories from the European Union?**

(ROTATE - ONE ANSWER PER LINE)

		Daily	Several times a week but not daily	About once a week	About once every other week	About once a month or less often	Never	Don't know
1	Meat and meat products from the European Union	1	2	3	4	5	6	7
2	[DO NOT ASK IN UAE, IN KSA AND IF AGE(D1) <21 IN USA] Wine, beer and spirits from the European Union	1	2	3	4	5	6	7
3	Fruit and vegetables from the European Union	1	2	3	4	5	6	7
4	Dairy products (incl. cheese) from the European Union	1	2	3	4	5	6	7
5	Confectionery (incl. chocolate) from the European Union	1	2	3	4	5	6	7
6	Cereals and cereal-based products (incl. bread) from the European Union	1	2	3	4	5	6	7
7	Pasta from the European Union	1	2	3	4	5	6	7
8	Olive oil from the European Union	1	2	3	4	5	6	7

ASK ALL

Q4 **When purchasing agricultural, food or beverages, which of the following most influence your decision to buy a product?** (ROTATE ITEMS 1-8 – MAX 3 ANSWERS)

Safety	1
Quality	2
Authenticity	3
Taste	4
Health aspects	5
Price	6
Animal welfare	7
Environmental sustainability	8
Other	9
Don't know	10

ASK ALL

Q5 **To what extent do you agree or disagree that agricultural, food or beverage products from the European Union are…?**

(ROTATE – ONE ANSWER PER LINE)

		Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
1	...safe	1	2	3	4	5
2	…good quality	1	2	3	4	5
3	…diverse	1	2	3	4	5
4	…authentic	1	2	3	4	5
5	…nutritious	1	2	3	4	5
6	…tasty	1	2	3	4	5
7	…healthy	1	2	3	4	5
8	…good value for money	1	2	3	4	5
9	…animal welfare-friendly	1	2	3	4	5
10	…environmentally sustainable	1	2	3	4	5

ASK Q6a TO RESPONDENTS WHO CONSUME EU AGRICULTURAL PRODUCTS (Q1.2=1 TO 4) (consumes agricultural, food or beverage products from countries in the EU)

Otherwise go to Q6b

Q6a Would you be interested in consuming more agricultural, food or beverage products from the European Union if these products...?

(ROTATE ITEMS 1-8 – MAX 3 ANSWERS – CODE 10 IS EXCLUSIVE)

Offered safety assurances	1
Were of better quality	2
Offered reliable assurances of authenticity	3
Tasted better	4
Were a healthy choice	5
Were less expensive	6
Took care of animal welfare	7
Were environmentally sustainable	8
Other	9
None of these	10
Don’t know	11

Q6b Are you interested in starting to consume agricultural, food or beverage products from the European Union?

(ONE ANSWER ONLY)

Yes, definitely	1
Yes, to some extent	2
No, not really	3
No, definitely not	4
Don’t know	5

ASK ALL

Q7 Have you ever seen the labels displayed below?

(SHOW PDO, PGI AND ORGANIC PRODUCTS and 'ENJOY IT'S FROM EUROPE' LABELS) (ROTATE – ONE ANSWER PER LINE)

		Yes, I have seen it before and know what it is	Yes, I have seen it before but I do not know what it is	No, I never seen it before	Don't know
1	The European Protected Designation of Origin (PDO) label	1	2	3	4
2	The European Protected Geographical Indication (PGI) label	1	2	3	4
3	The European Organic Products label	1	2	3	4
4	The 'Enjoy It's From Europe' label	1	2	3	4

JW-01-26-019-EN-N

Publications Office
of the European Union