



The Resilience Gap

Innovating for European Agriculture

CONSUMER FINDINGS

Research by Kekst CNC
October 2026



The research involved interviews of 8,182 European adults aged 18+ between 17 August and 3 September 2026. Results are nationally representative, with a margin of error of $\pm 1.1\%$ on headline figures.

Quotas were set on age, gender and region in each market:

- UK: n = 1,085. Margin of error of $\pm 3.0\%$ on headline figures.
- Spain: n = 1,003. Margin of error of $\pm 3.3\%$ on headline figures.
- Italy: n = 1,033. Margin of error of $\pm 3.2\%$ on headline figures.
- France: n = 1,007. Margin of error of $\pm 3.2\%$ on headline figures.
- Benelux: n = 1,001. Margin of error of $\pm 3.2\%$ on headline figures.
- Romania: n = 1,016. Margin of error of $\pm 3.2\%$ on headline figures.
- Poland: n = 1,017. Margin of error of $\pm 3.1\%$ on headline figures.
- Germany: n = 1,020. Margin of error of $\pm 3.2\%$ on headline figures.

Surveys were conducted in English, Spanish, Italian, French, Dutch, Romanian, Polish and German.

Research conducted by Kekst CNC.



01

Pressures on farmers, profitability and support

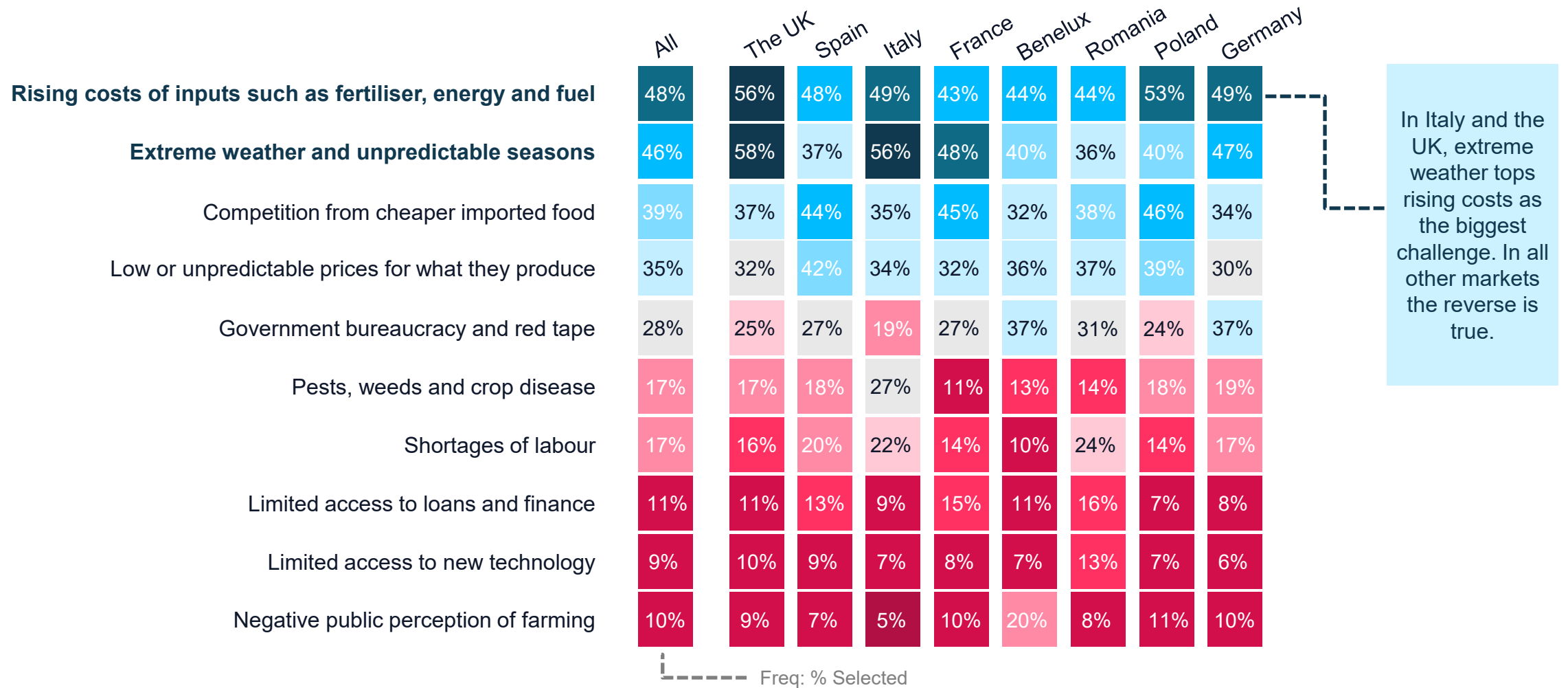


Rising costs and extreme weather seen as top challenges facing farming by half of Europeans

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Q. What do you think are the biggest challenges facing farmers in YOUR COUNTRY today? Please choose up to three.





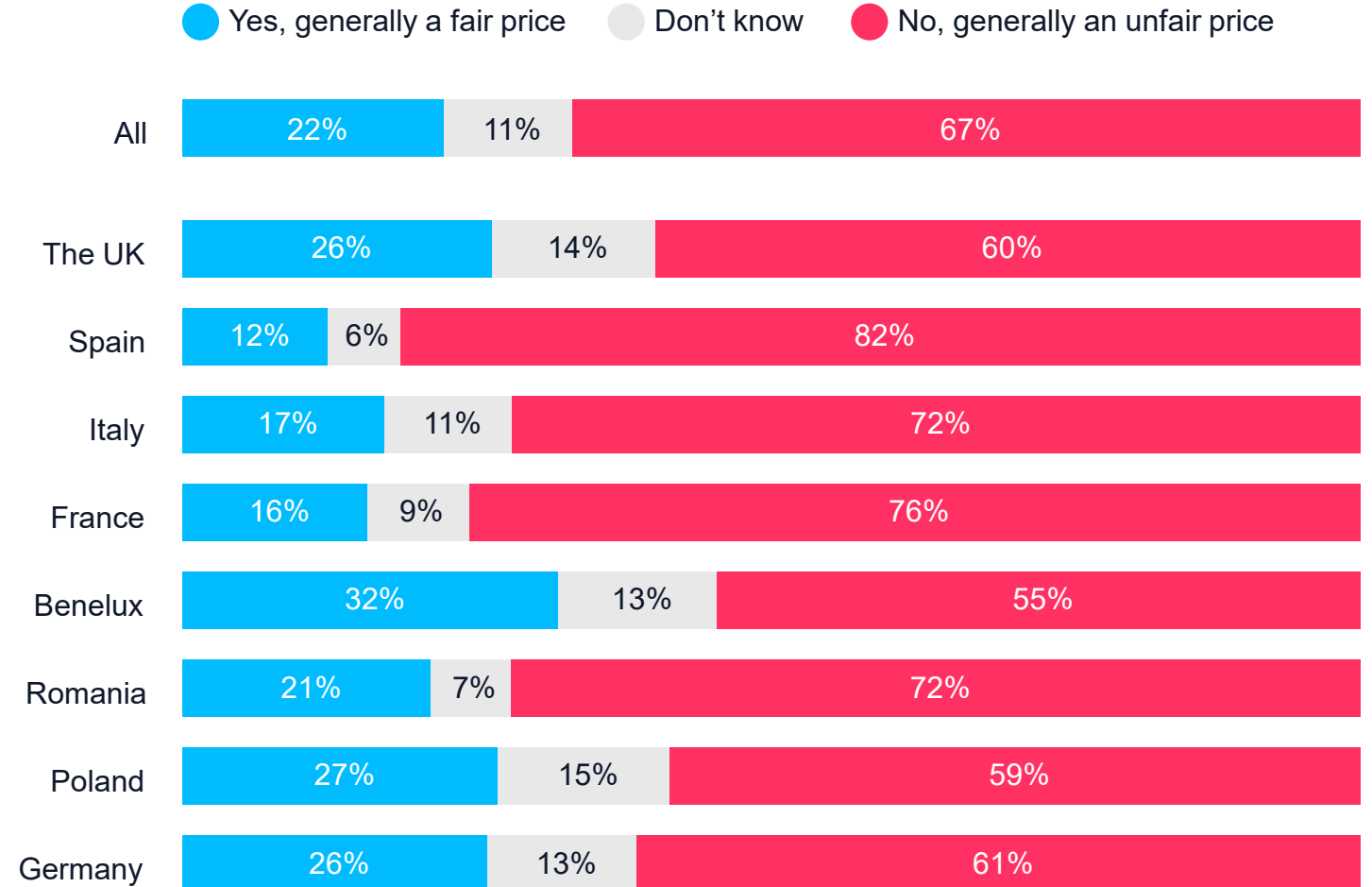
Europeans across the board believe farms don't receive a fair price for the food they produce

Q. Do you think farmers in YOUR COUNTRY generally receive a fair price for the food they produce? Q. Imagine 10 LOCAL CURRENCY spent on food in a supermarket. How much of that do you think ends up with the farmers who produced it?

Asked how much of every €10 spent on food in a supermarket reaches the farmer who produced it, the median European answer is €2, and 52% say €2 or less.

Spanish consumers are the most pessimistic, with 68% saying €2 or less, and Romanians the least, on 37%.

Consumers already believe farmers are being squeezed out of the retail price.





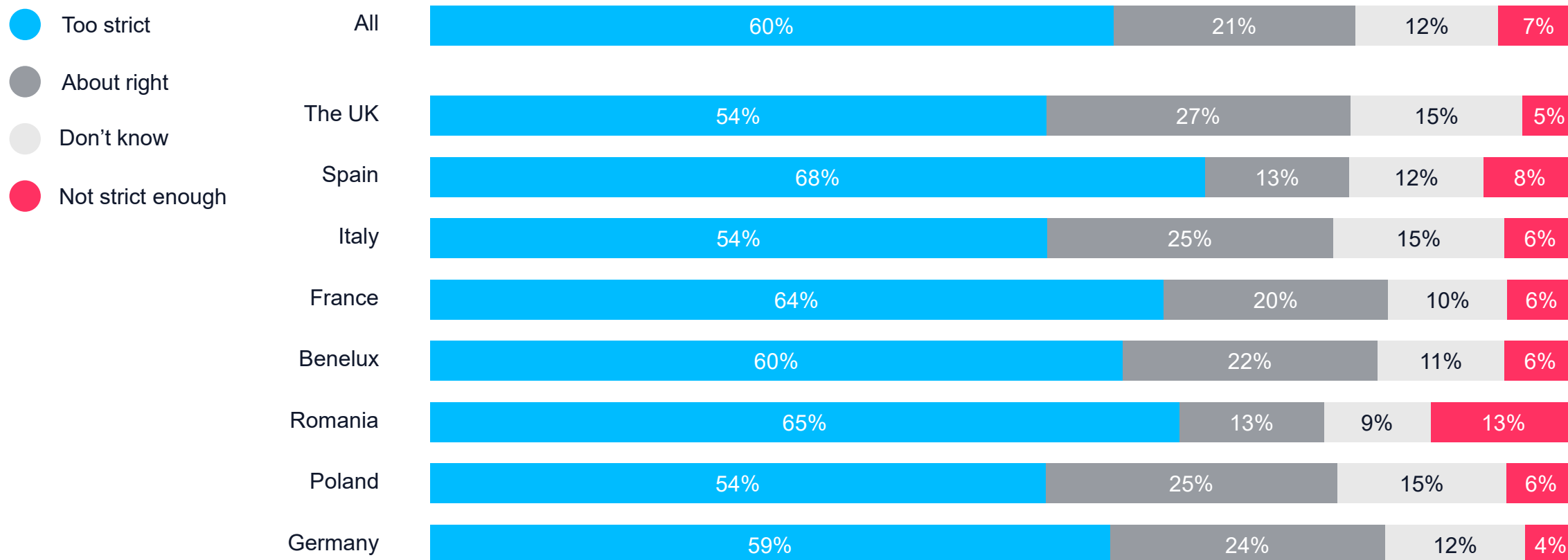
Views on the rules and bureaucracy farmers face

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Q. And do you think the rules and bureaucracy farmers have to deal with in YOUR COUNTRY are...

Rules and bureaucracy





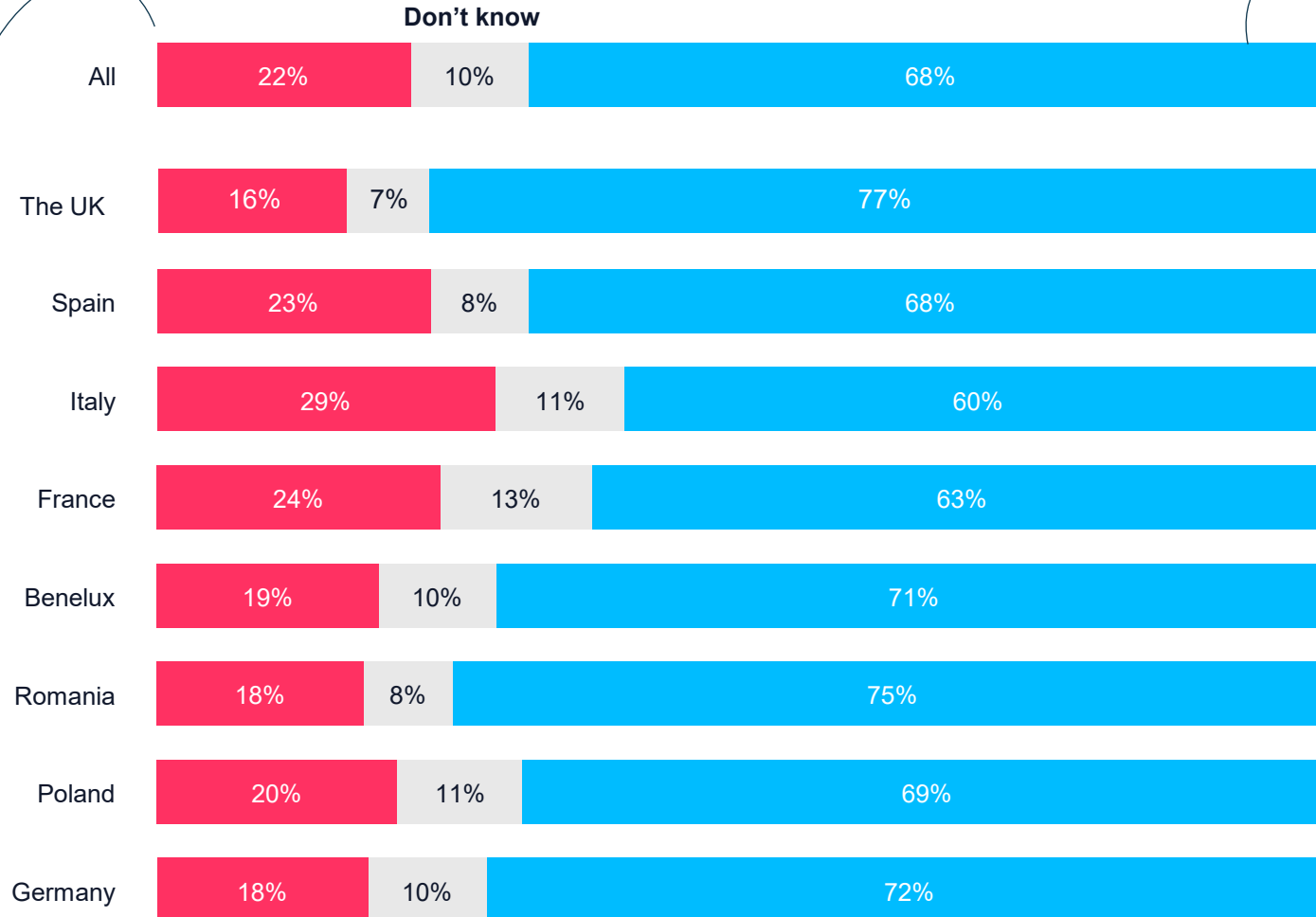
All Europeans want a pro-innovation approach to farming technology, though Southern Europeans are more split

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Q What statement do you agree with more?

The EU/UK Government should block farming technologies whenever there is any doubt about safety, even if that means farmers and shoppers wait longer for the benefits

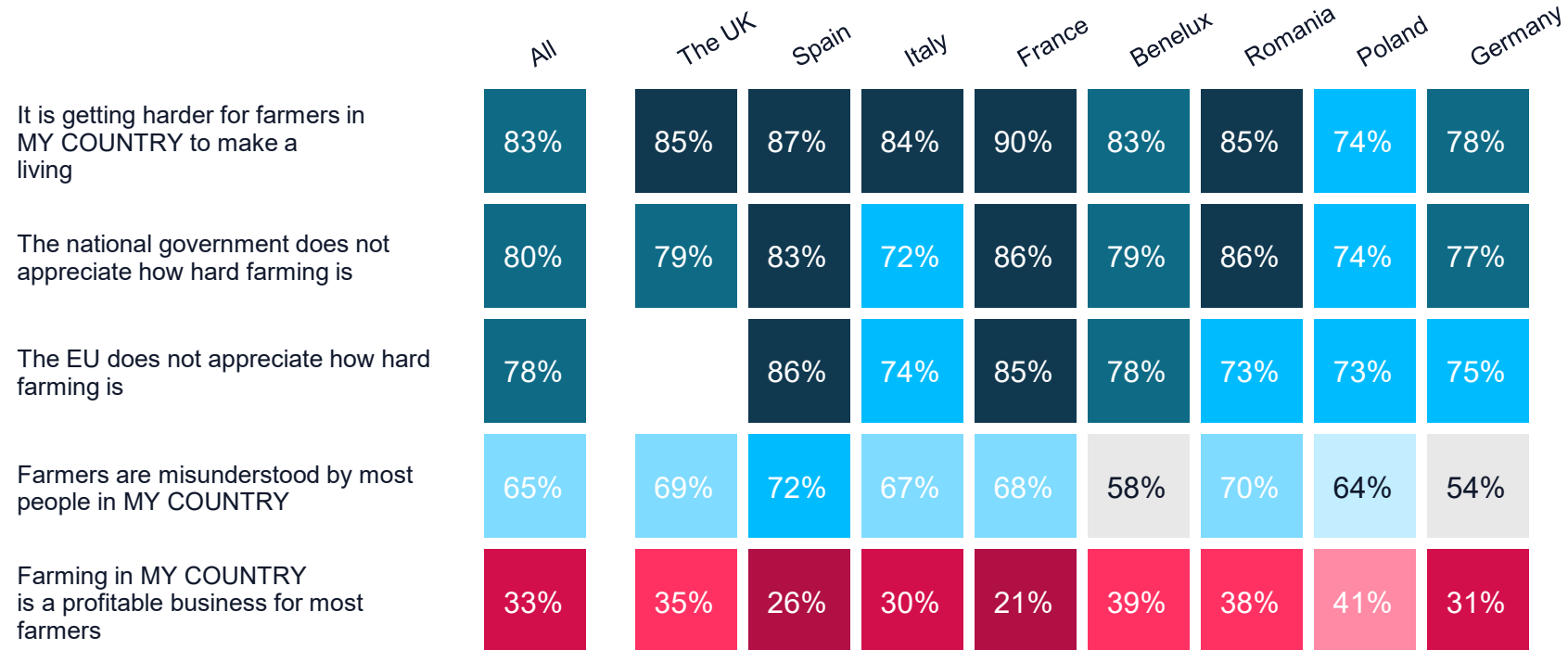


The EU/UK Government should allow farming technologies unless there is clear scientific evidence of harm, so that innovation moves faster, farmers get better harvests and food prices come down



Western Europeans don't believe farming is profitable and there is consensus across Europe that the sector is misunderstood

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



Freq: "Strongly agree" or "Somewhat agree"



02

Food security and the cost of food



Most Europeans have some degree of uncertainty around their country's level of food security

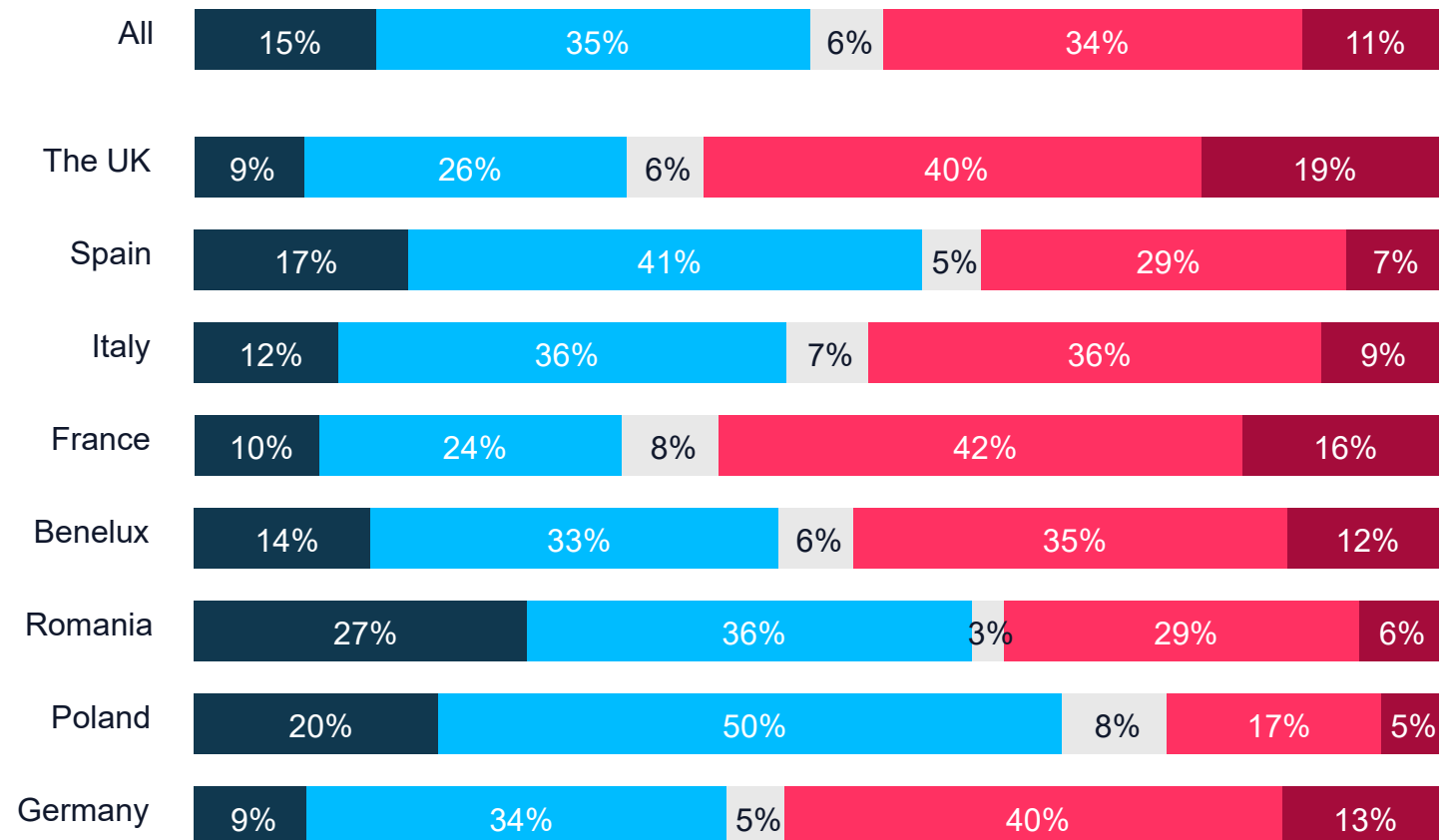
Q. If a major crisis disrupted global trade for a year, do you think YOUR COUNTRY would be able to produce enough food to feed itself?

● Yes, definitely ● Yes, probably ● Don't know ● No, probably not ● No, definitely not

Overall Europe is split down the middle on whether they could be self sufficient.

Those in the UK, Germany and France are particularly pessimistic about their country's self sufficiency in the event of a global crisis.

Eastern European respondents were much more optimistic. 63% of Romania and 70% of Poland believe their country would definitely or probably be able to produce enough to feed itself.

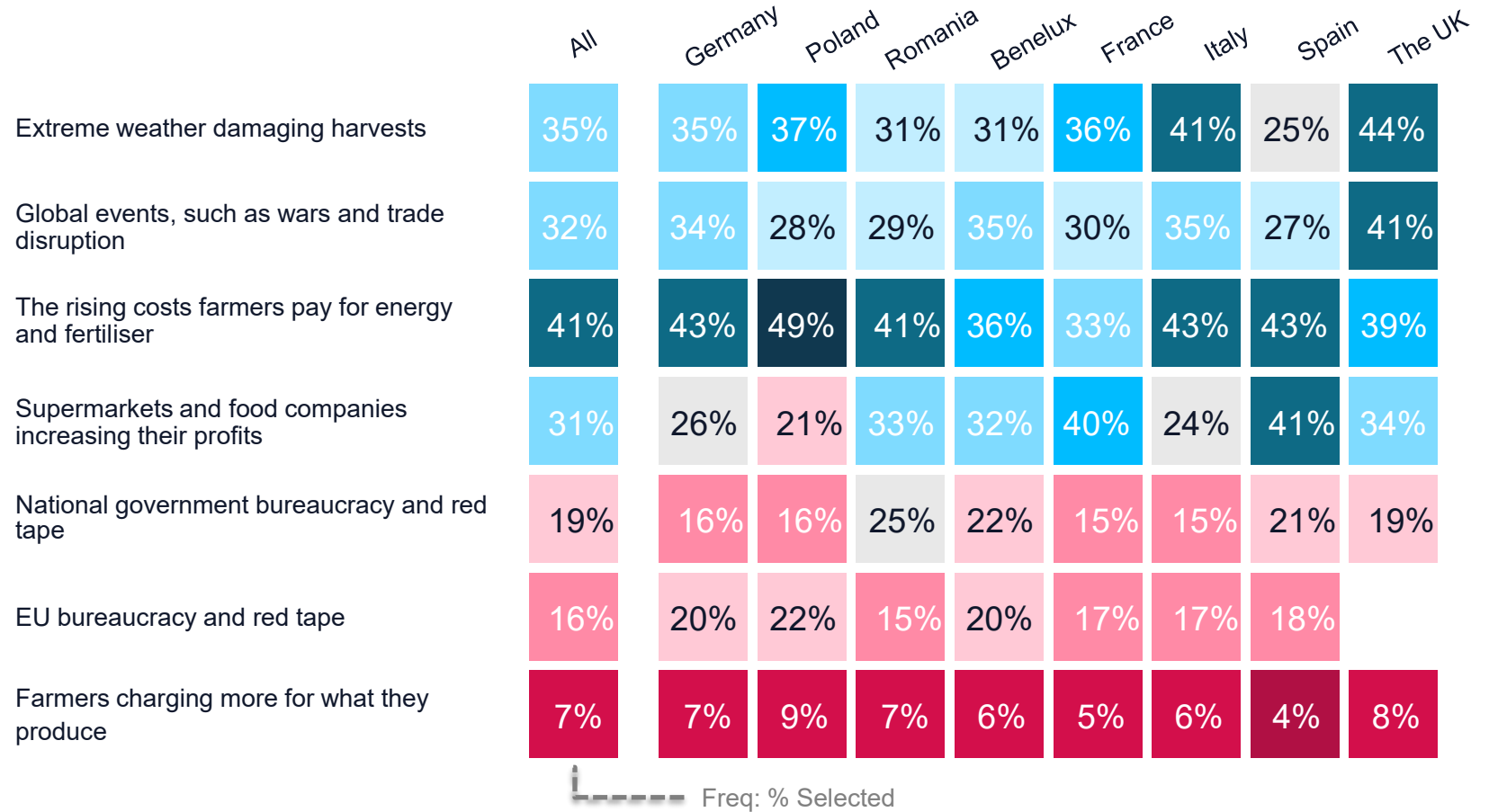


Europeans place the blame for rising food prices squarely outside of the agricultural sector

Q. Which of the following do you think are most responsible for rising food prices? Please choose up to two.

It's worth noting that paired together, EU and national government bureaucracy and red tape make up 45% of blame, higher even than rising energy and fertiliser costs.

Extreme weather and global events tend to move in lockstep with each other in each market, with countries assigning blame to both in tandem.





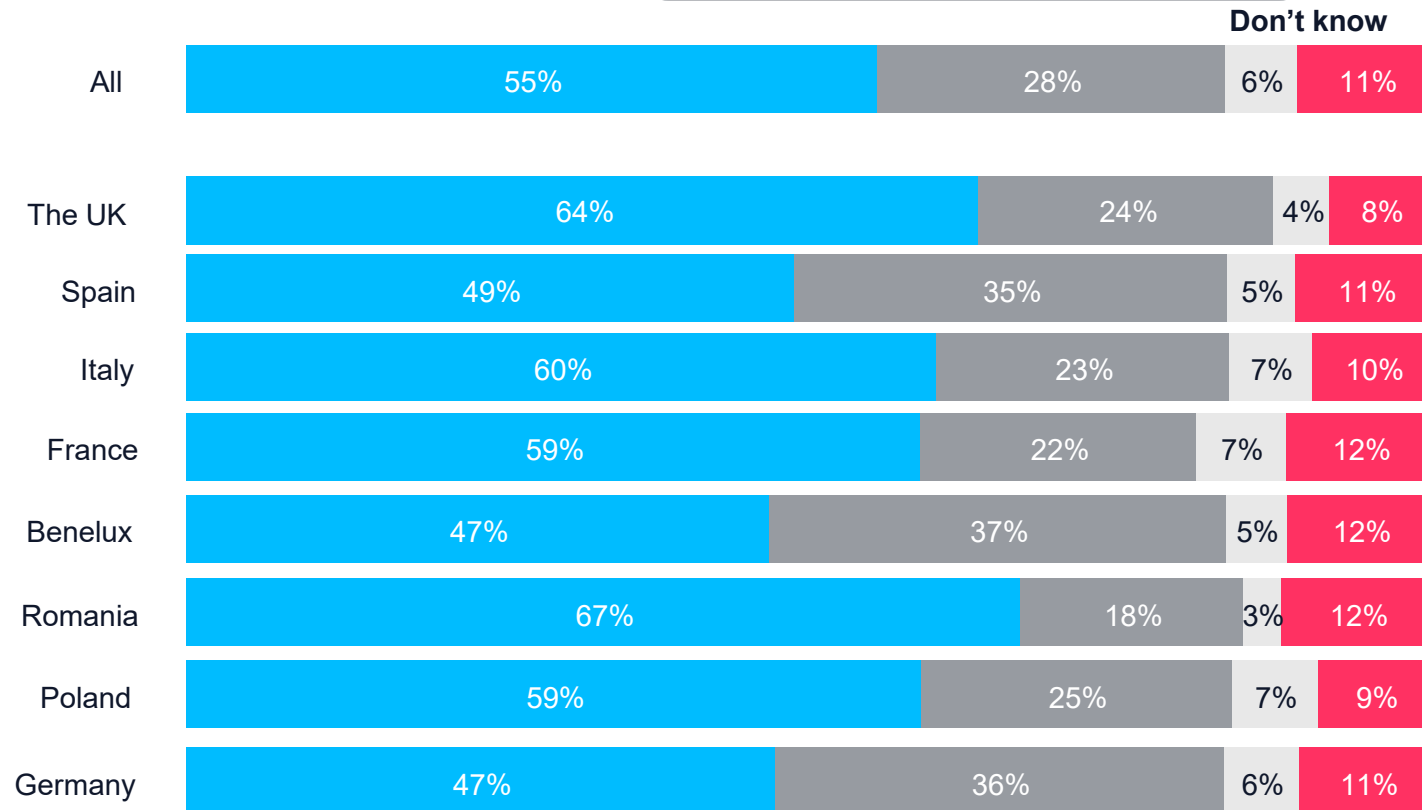
Most Europeans would rather see an emphasis on domestic or European produce than whatever is cheapest

Q. Which of the following comes closest to your view?

YOUR COUNTRY should produce more of its own food, even if it costs a little more

The EU/Europe should produce more of its own food collectively, even if it costs a little more, but it doesn't need to come from **YOUR COUNTRY** specifically

YOUR COUNTRY and the EU/Europe should buy the cheapest food available, wherever in the world it comes from





Europeans see food security as national security

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

	All	The UK	Spain	Italy	France	Benelux	Romania	Poland	Germany
Producing more of our own food in My COUNTRY should be a national priority	86%	90%	88%	88%	86%	80%	92%	83%	78%
Food security is a matter of national security	84%	85%	89%	89%	86%	79%	86%	86%	74%
Cutting bureaucracy and red tape for farmers would help make sure we can produce enough food in the future	77%	78%	81%	75%	75%	76%	85%	75%	76%
Innovation in farming is one of the most important drivers of food security	75%	77%	81%	78%	66%	71%	82%	77%	71%
Innovation in farming today is what will make sure we can still produce enough food in the future	75%	81%	77%	78%	68%	75%	83%	66%	69%
If farmers were allowed to use the latest science and technology, our food supply would be more secure	70%	72%	75%	70%	59%	66%	82%	73%	65%
If farmers were allowed to use the latest science and technology, food would be more affordable	65%	69%	69%	63%	57%	59%	75%	71%	59%
National politicians are holding back innovation in farming	62%	61%	68%	54%	62%	59%	74%	57%	66%
The EU is holding back innovation in farming	56%		63%	51%	58%	55%	53%	50%	60%

!----- Freq: "Strongly agree" or "Somewhat agree"

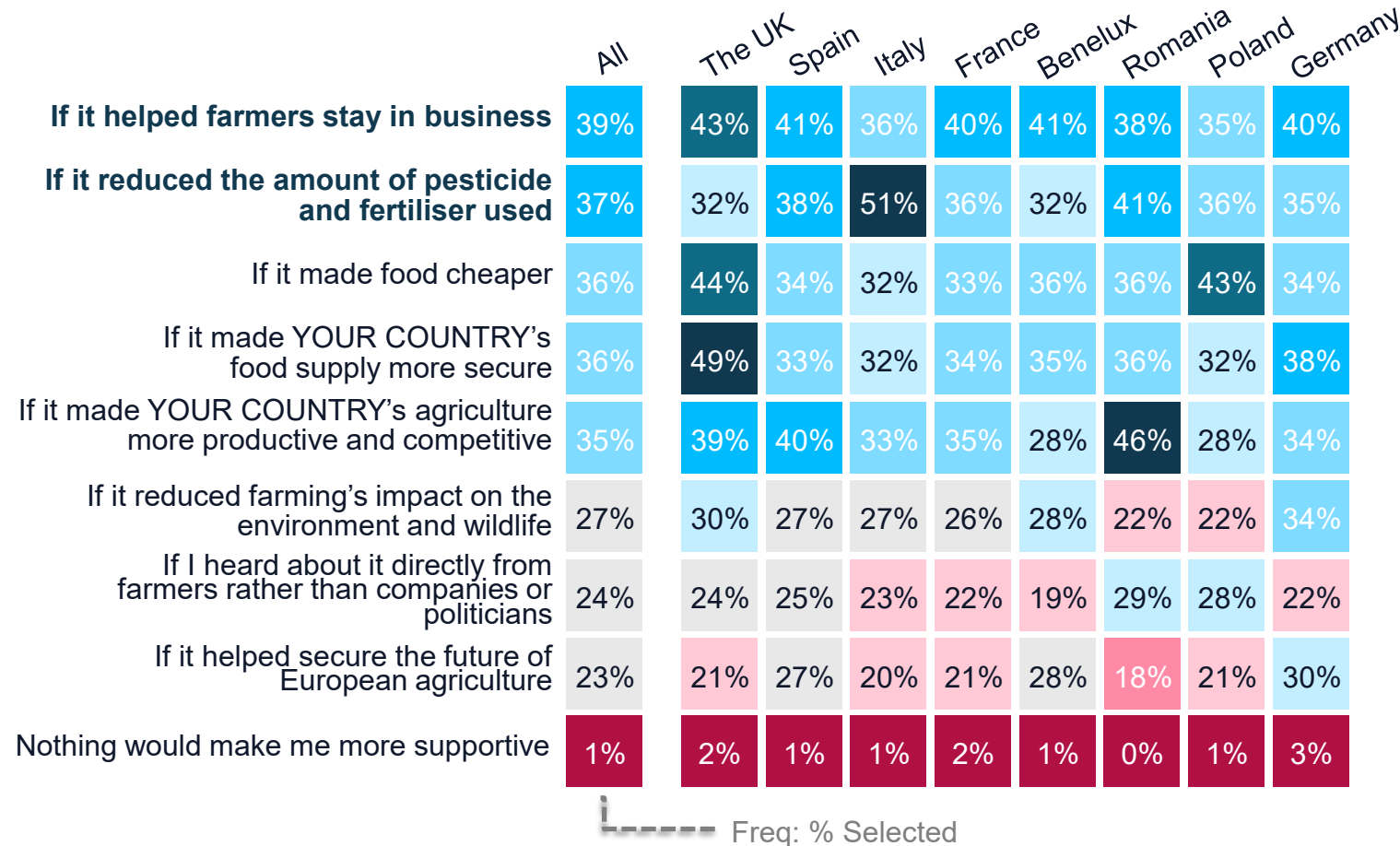


Helping farmers stay in business is the strongest driver of support for innovation in farming

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Q. Which of the following, if any, would make you more supportive of farmers using new science and technology to grow food? Please select all that apply.



Almost no one in the public is closed to arguments about technology, with only 1% say nothing would make them more supportive.

Helping farmers and **reduction of pesticide and fertiliser use** are the most powerful rationales to adopt new science and technologies.

Secondary arguments vary more by country. In the UK, food supply security is particularly powerful, alongside cheaper prices in Poland and a more productive and competitive agriculture sector in Romania, which would make consumers more supportive.



03

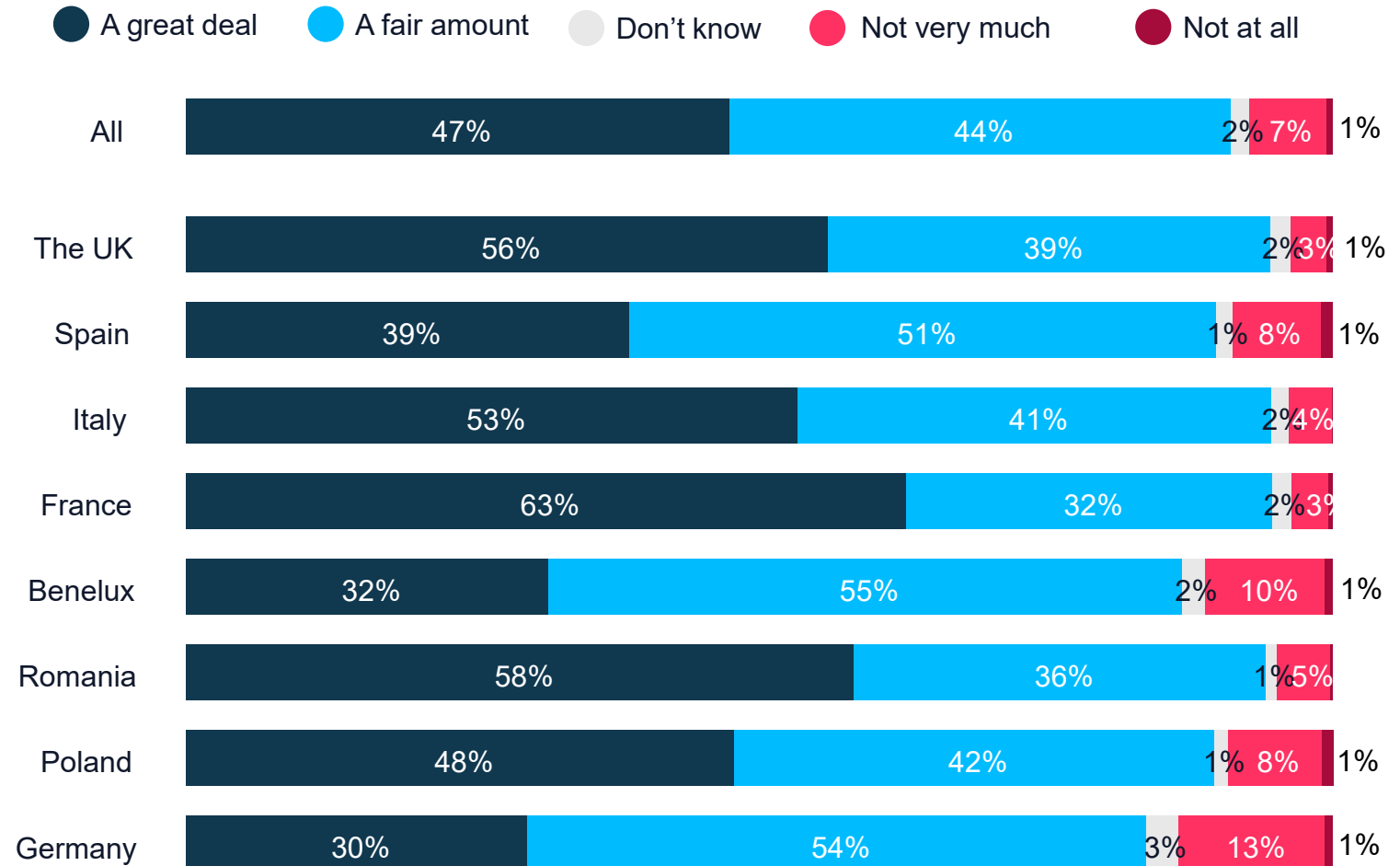
Extreme weather and food



Almost half of Europeans believe extreme weather is affecting farmers in their country a great deal

Q. How much, if at all, do you think extreme weather is affecting farmers in YOUR COUNTRY today?

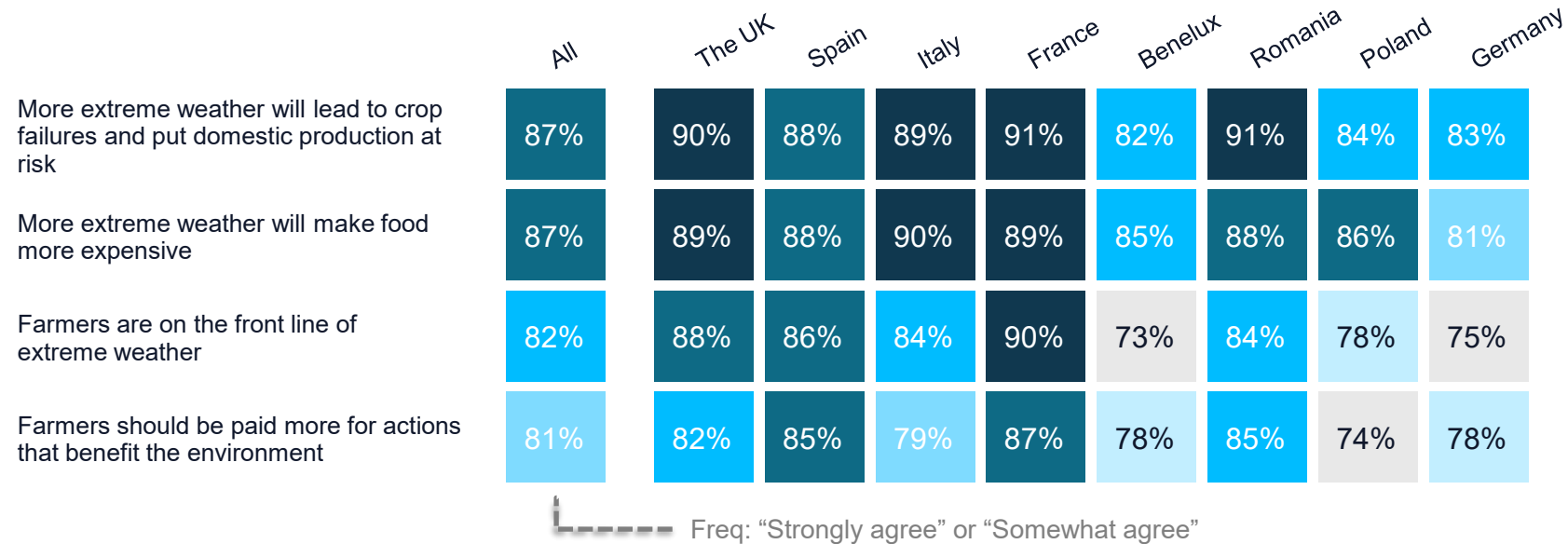
Benelux and Germany are notably less likely to think extreme weather is affecting their country a great deal, though a majority in these markets still believe extreme weather is affecting farming to some degree.





The impact of extreme weather on farming and food affordability is widely recognised

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





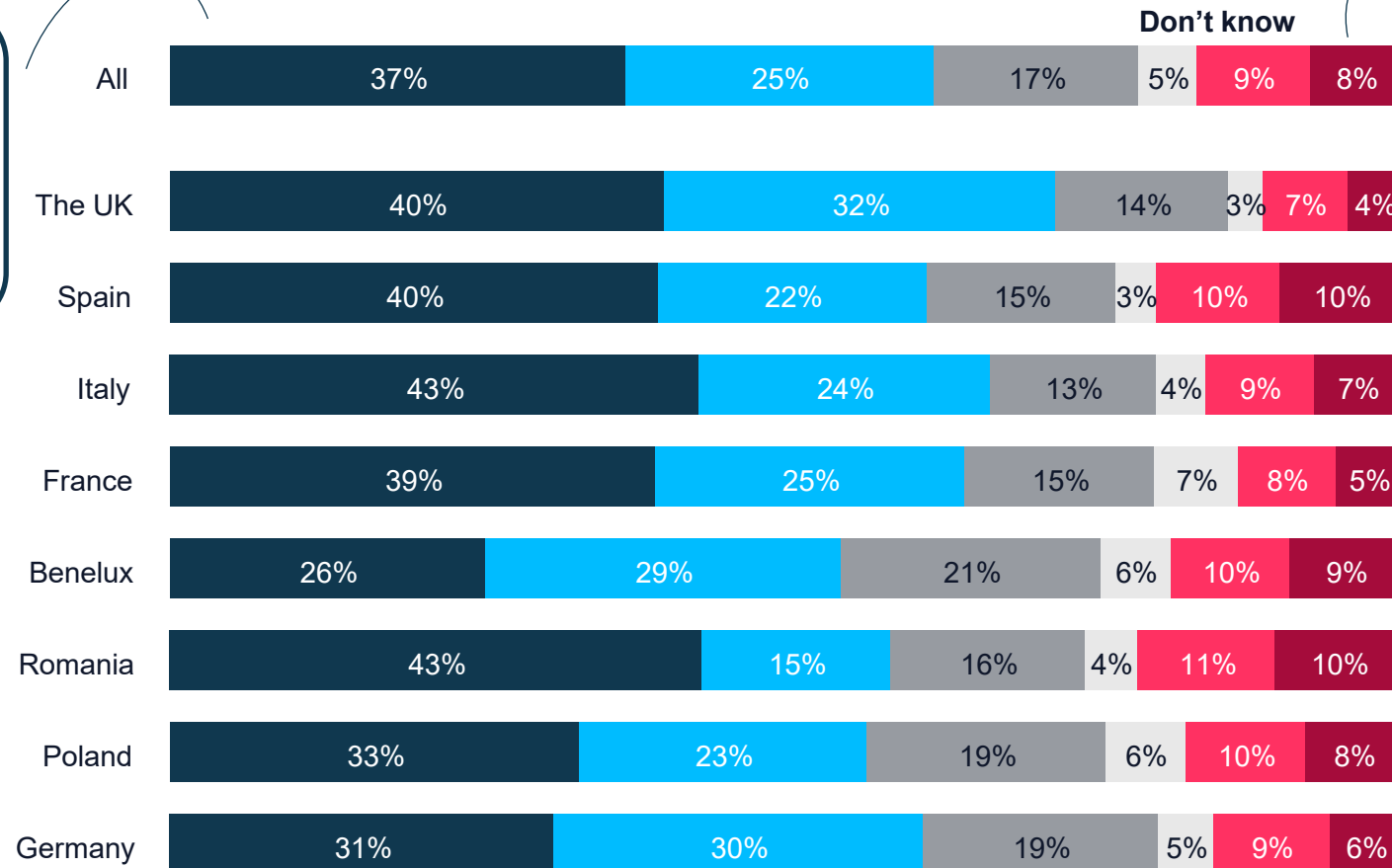
Across Europe, people are worried about the effects of extreme weather on food supply

Q. Below are two different views people have about extreme weather and food sovereignty. Using the scale, please indicate which is closer to your own view.

Extreme weather is a serious threat to YOUR COUNTRY's ability to produce and control its own food supply, and I worry about this

Benelux and Germany have a notably lower strength of concern than other markets surveyed.

Extreme weather is not a serious threat to YOUR COUNTRY's ability to produce and control its own food supply, and I don't worry about this





04

Science and innovation

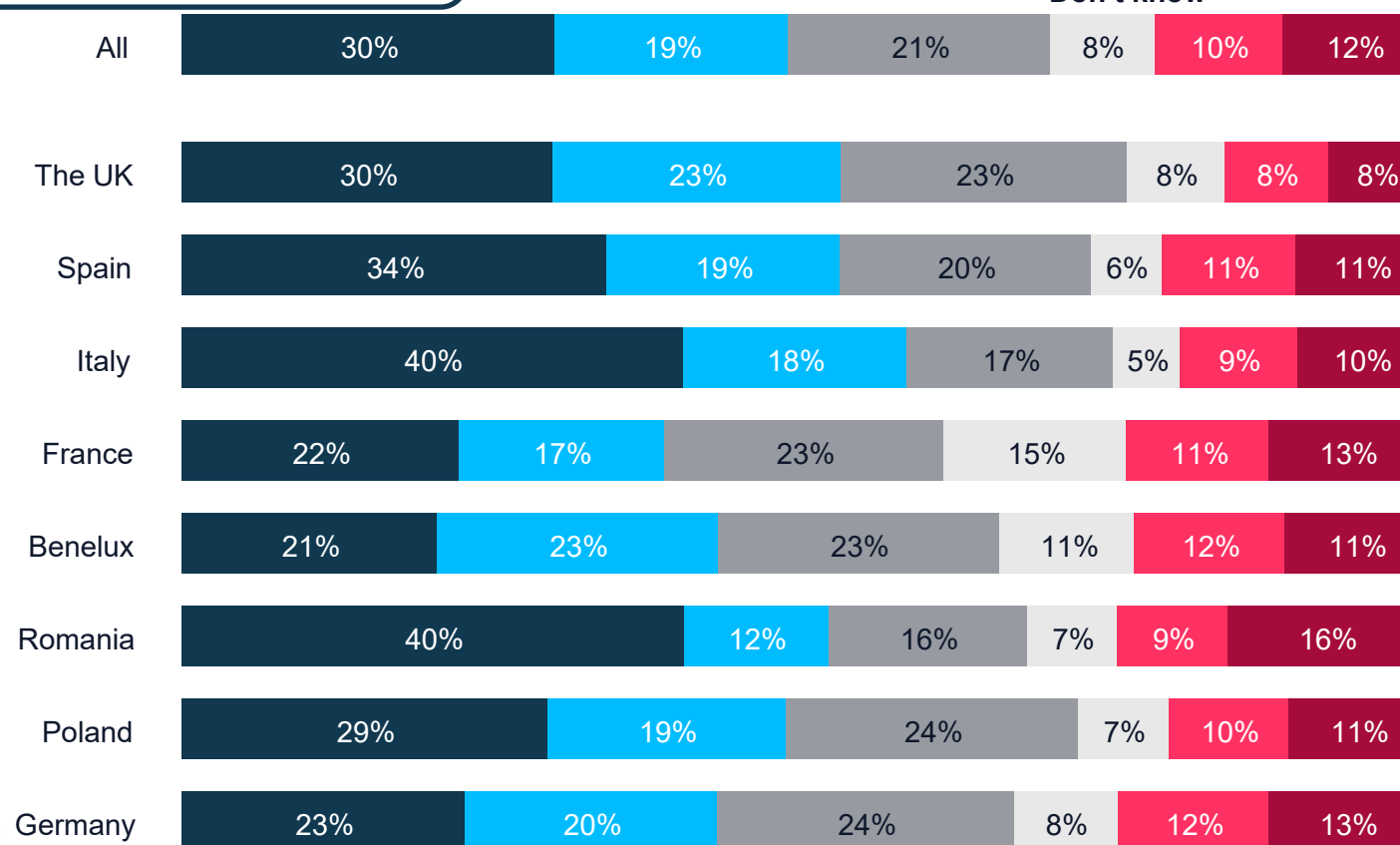
Innovation in farming should be guided by scientific evidence and expert judgement

Q. Below are two different views on what should shape policy on technological innovation in farming. Using the scale, please indicate which is closer to your view.

Policy on technological innovation in farming should be guided mainly by scientific evidence and expert judgement

Policy on technological innovation in farming should be guided mainly by public opinion and ethics

Don't know



France, Benelux and Germany favour a slightly more balanced approach but science and experts still win out over public opinion and ethics.

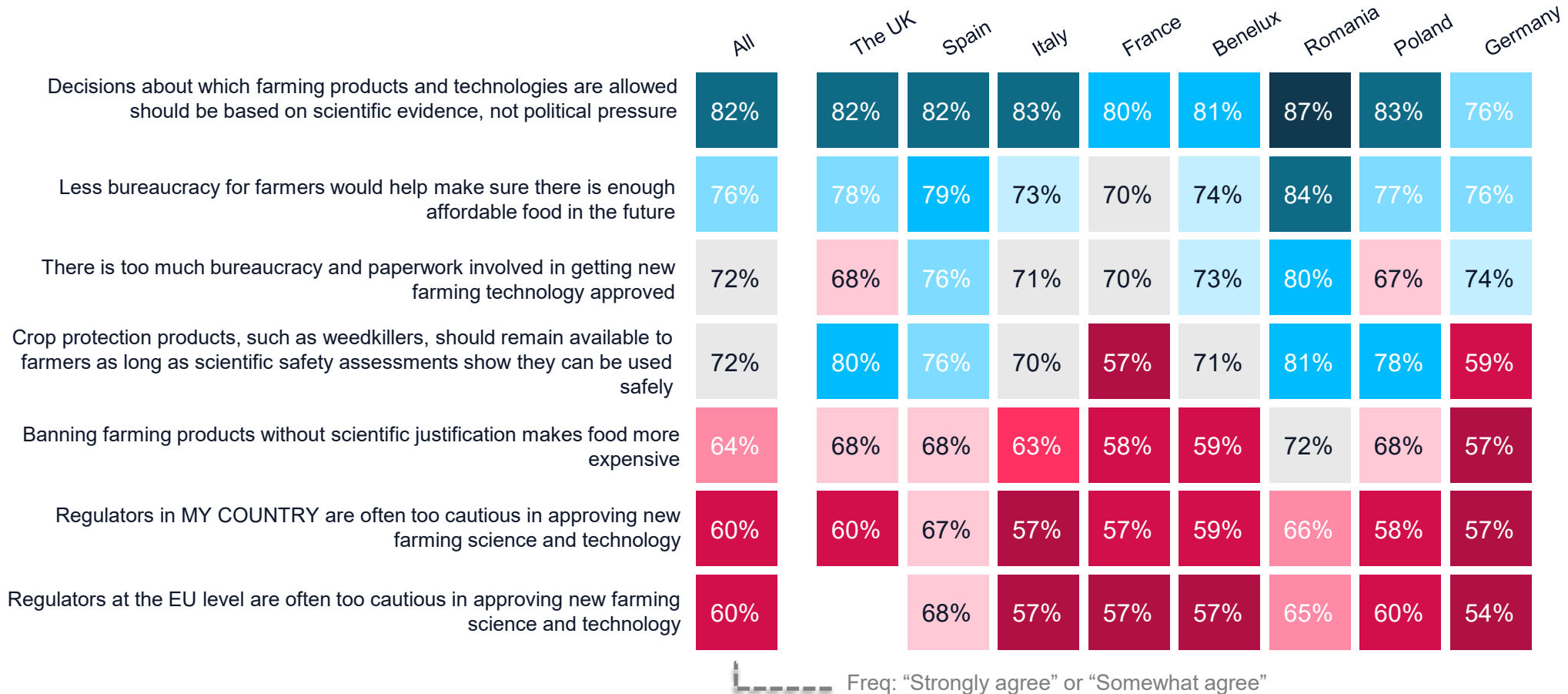


Europeans favour science over political pressure in regulations; bureaucracy is a loaded term

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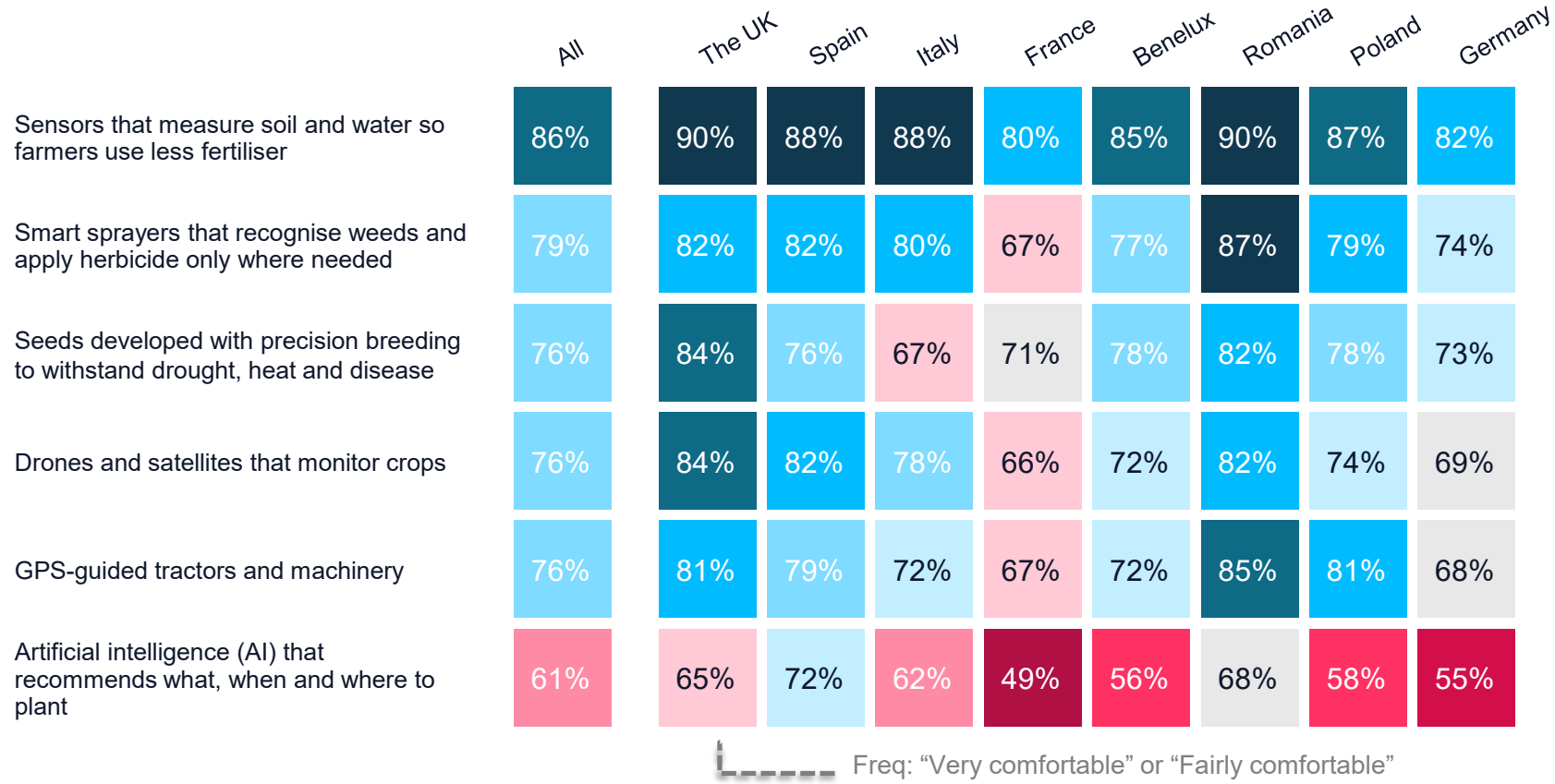
Q. To what extent do you agree or disagree with the following statements?





Consumers are broadly comfortable with farming technologies, but more cautious about AI

Q. Modern farms increasingly use new technologies. How comfortable or uncomfortable are you with each of the following being used to grow food?





05

Recognition and the future



Europeans want farmers recognised and given access to innovation

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

	All	The UK	Spain	Italy	France	Benelux	Romania	Poland	Germany
Farmers are critical to ensuring food security	87%	89%	90%	88%	86%	84%	91%	86%	79%
Farmers deserve more credit for their role in feeding the country	86%	90%	90%	87%	87%	81%	91%	79%	81%
Farmers should have access to the latest technology and innovations to do their job	84%	88%	86%	84%	78%	81%	90%	84%	77%
People should listen to the voice of farmers more	83%	88%	89%	85%	82%	75%	86%	75%	80%
Unless farmers are free to innovate, we will struggle to produce enough food in the future	77%	82%	81%	78%	75%	70%	85%	74%	74%
Farming is a valuable career	77%	85%	90%	79%	60%	71%	84%	66%	82%

└─── Freq: "Strongly agree" or "Somewhat agree"

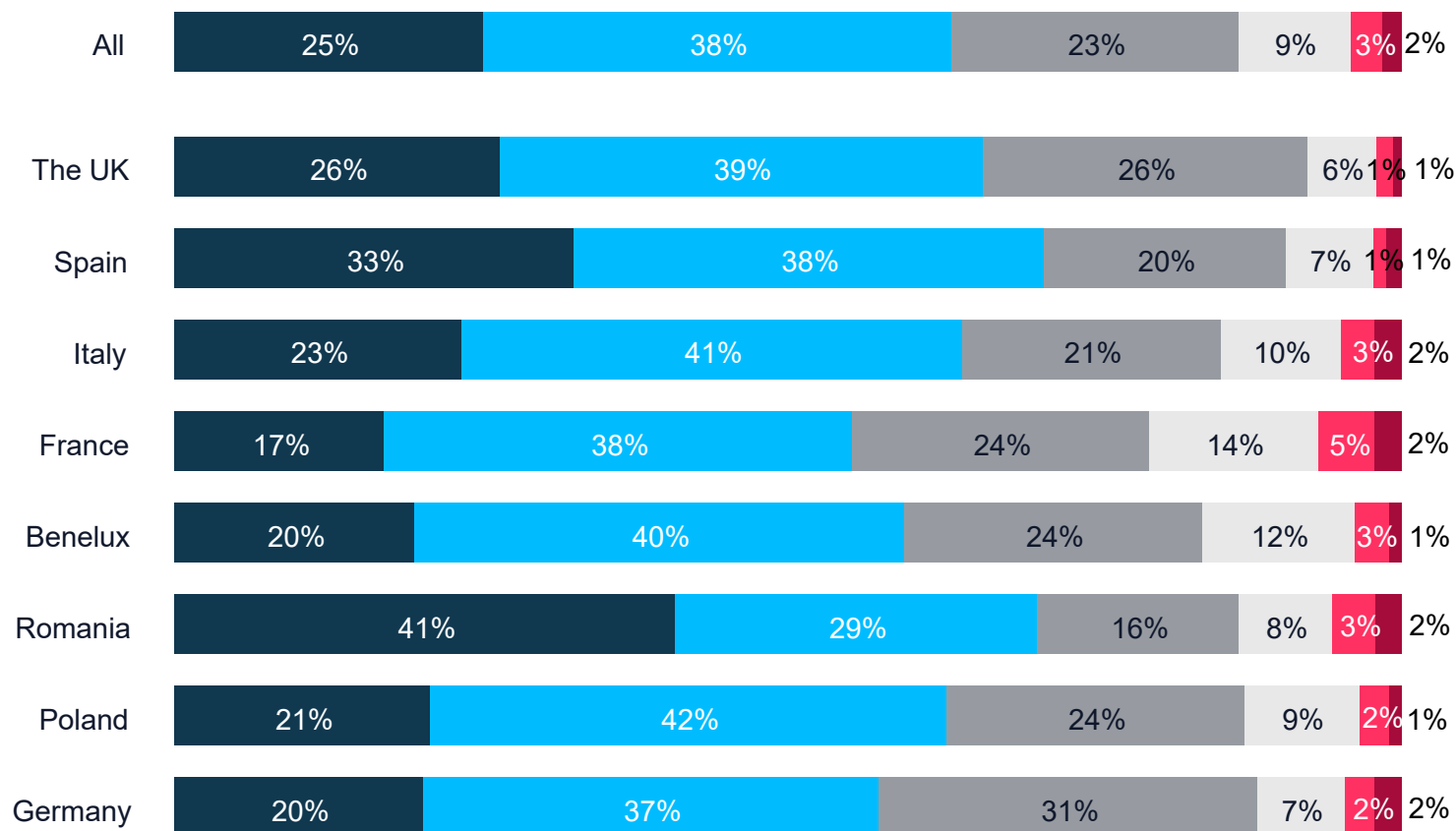
There is a political incentive for parties to support agri-tech

Q. Would you be more or less likely to vote for a political party that backed farmers using new science and technology?

Much more likely
 Somewhat more likely
 It would make no difference
 Don't know
 Somewhat less likely
 Much less likely

There is virtually no downside to taking a pro-innovation stance with only one in twenty being put off by such a position from a political party.

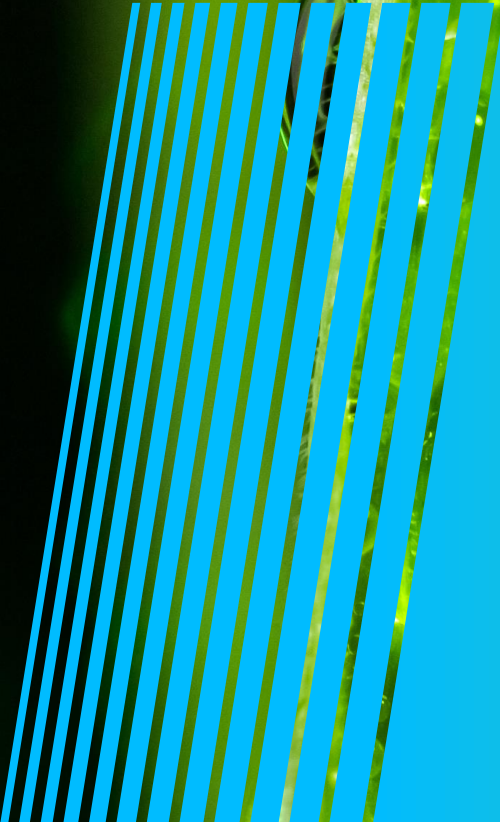
That holds in every market, from 55% in France at the low end to 71% in Spain at the high end, and across every age group.





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Thank You!

Let's Talk