



Consumers as geopolitical actors: What Europeans expect from the EU in a disruptive world



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group

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Introduction

The start of 2026 brought little respite for Europe. The war in Ukraine ground into its fifth year. The Trump administration threatened to annex Greenland, wielded tariffs as political weapons, and signalled openly that a strong, unified EU was a problem to be managed rather than an ally to be supported. The old assumptions no longer held.

And somewhere in the middle of it all, 450 million European citizens were watching — and forming views.

So, we asked citizens directly. Nearly 10,000 people across ten countries — Belgium, Denmark, France, Germany, Hungary, Ireland, Italy, Poland, Portugal and Spain — surveyed at a moment of maximum uncertainty, just weeks before the war in the Middle East added yet another fault line. Tracking sentiment simultaneously across all ten countries: **where Europeans converge, where they diverge, and why both matter for anyone navigating this continent.**



What they told us was clear, urgent and at times surprising:

- **70%** want the EU to hit back at US tariffs with counter-measures
- **44%** have already reduced or stopped buying American goods
- **51%** believe strengthening trade ties with Japan and South Korean should be a high priority for the EU. **37%** think it should be China.
- **80%** want the EU to invest in its own technology to reduce strategic dependencies
- **72%** back Denmark and Greenland — even at an economic cost to themselves

What emerges from the data is something broader than consumer sentiment.

Europeans are not passive observers of geopolitical shifts: through their choices, their trust and their everyday behaviour, they are shaping markets and sending signals that businesses and policymakers increasingly cannot afford to miss. Understanding how citizens' expectations translate into economic direction has become, quietly, a strategic necessity.

That is the lens Euroconsumers brings, and what this report sets out to explore.

1. Europe, time to step up!

Respected, not feared

Europeans respect the EU. They just don't think it punches its weight:

- Six in ten respondents see it a **major political force (60%)**.
- Nearly two thirds **(63%)** recognise it as a **global economic powerhouse**.
- And **68% believe it offers a higher quality of life** compared with other regions of the world.



That economic and political standing is real – but it hasn't always translated into influence.

Ask consumers about the EU's military power, and confidence collapses. Only 36% see the EU as a serious hard power — a minority view, and a damning one.

Europeans have built one of the world's great economies and a significant political bloc — but without the foreign policy muscle to back it up, that weight goes unfelt on the world stage. Without strategic reach, it is a ceiling, not a foundation.



Good in theory, tested by reality

The crises of the last few years have made that lack of strategic reach and power ceiling visible.

- On Ukraine, **42% credit the EU with strong leadership** — respectable, but not really a standing ovation.
- On Gaza, the verdict is damning: **41% say the EU has failed to show strong leadership**.
- On Trump, more Europeans disapprove of the EU's response than support it — **38% disagree with how Brussels has handled his policies, against just 34% who back it**.

And internally, **two thirds (67%) think political divisions between member states are actively undermining the EU's global influence**. That's not outside criticism. That's Europeans diagnosing their own bloc — and finding it wanting.

The gap between what the EU is and what it could be isn't lost on its own citizens. They're waiting for the institution to close it.

% agreeing with the following statements about the EU



2. Stand up to Trump: the honeymoon is over

From alliance to friction

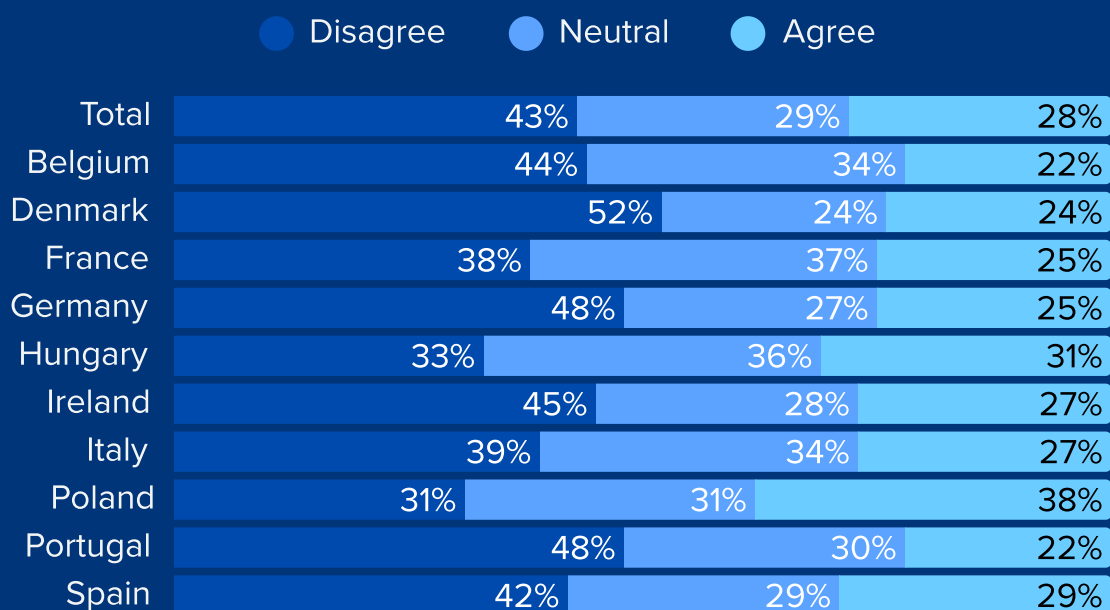
The post-war “honeymoon phase” between the EU and the United States has long faded. After several shocks during the presidencies of Donald Trump, the transatlantic relationship appears increasingly strained – and European consumers are well aware of it.

The transatlantic relationship isn't fraying — it's already frayed. According to the survey, only 28% of respondents believe the US will always be a reliable partner. Instead, half of respondents believe the EU should focus on finding new partners. That's not a fringe view. That's nearly half of consumers surveyed recalibrating its most important alliance.

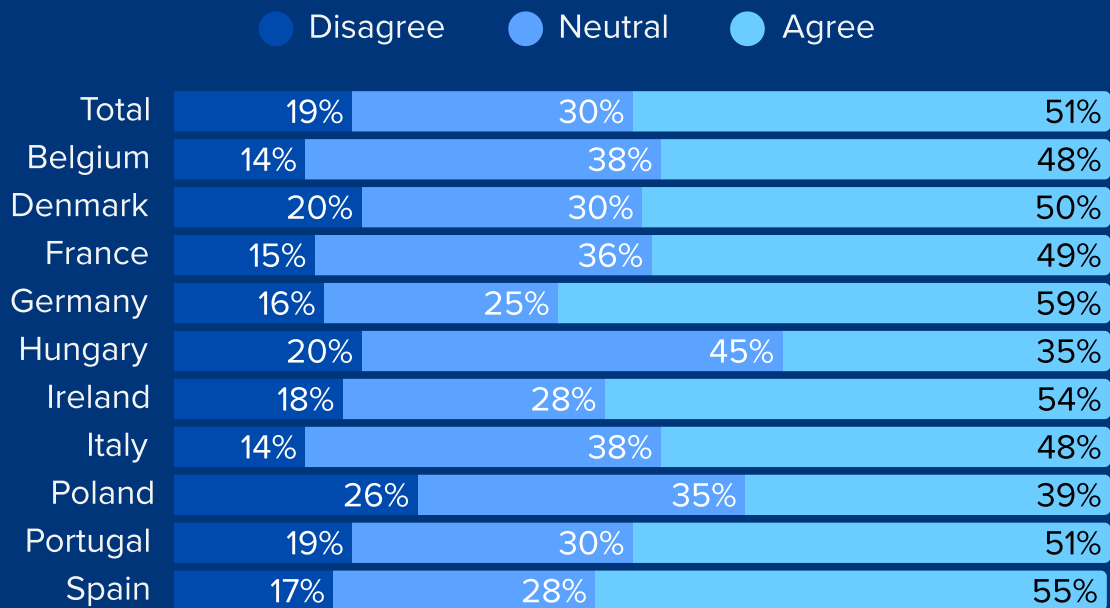
The shift isn't uniform. Poland still leans toward Washington. But Belgium, France, Ireland, Italy, Portugal and Spain have already moved on — and the data shows it.

To what extent do you agree with the following statements regarding long-term EU-U.S. relations?

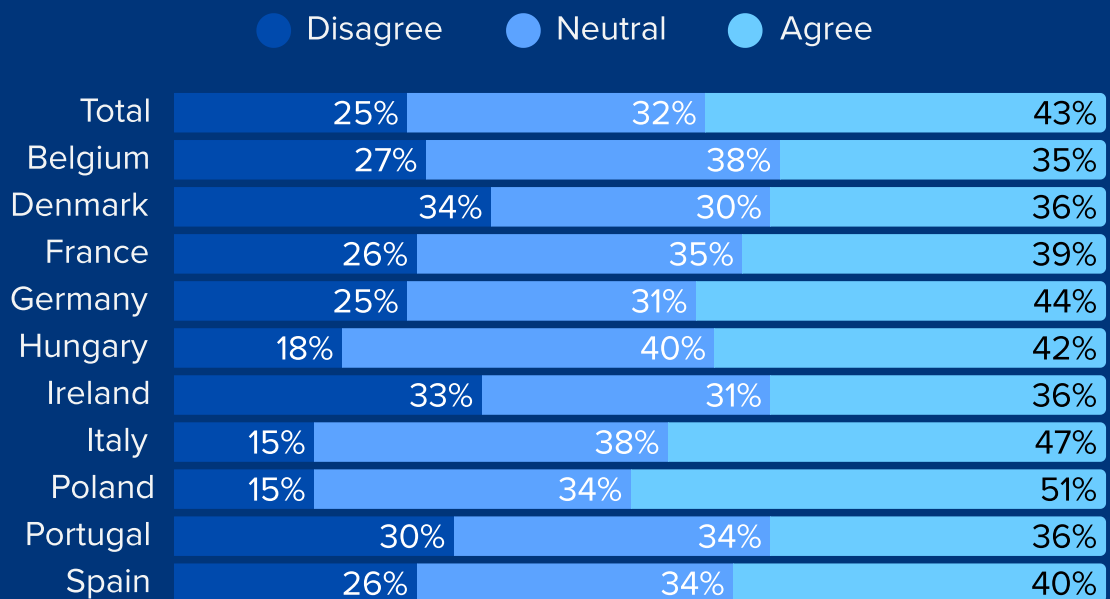
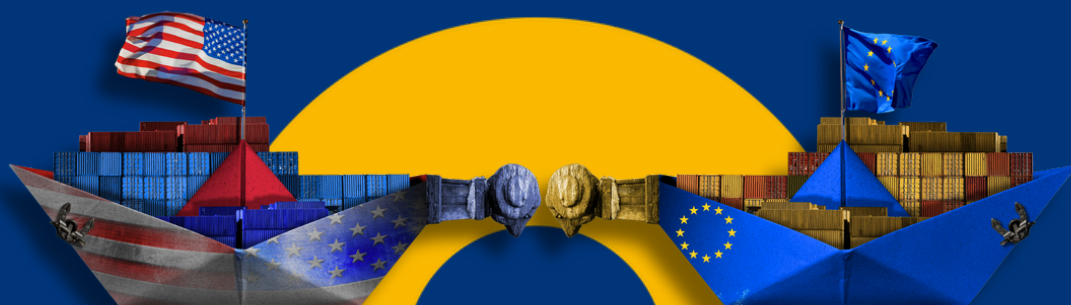
The US will always be a reliable partner



The transatlantic alliance is fundamentally broken, and the EU should focus on finding new partners



The relationship is still strong despite disagreements



Tariffs: the gloves are off

One of the clearest flashpoints in the relationship is the threat of tariffs from the US administration on the European Union. **Most respondents (74%) believe that the US uses tariffs primarily as a tool of political pressure on the EU** rather than for purely economic purposes.

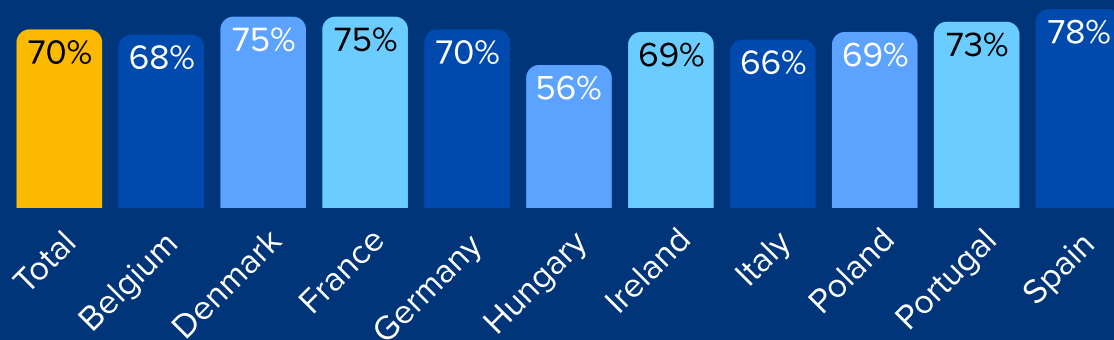
While some European countries – Poland in particular – believe that tariff negotiations should be handled at the national level, most want Brussels, not national capitals, leading the fight.

And they have their answer ready: **70% say the EU should respond to US tariffs with counter-tariffs.**

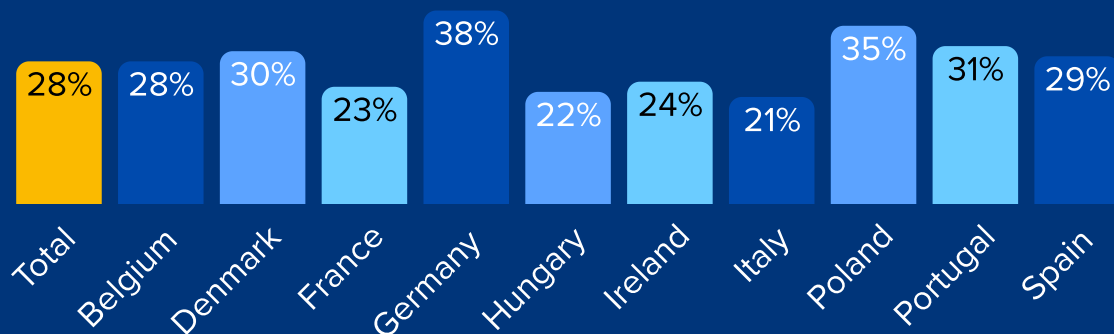


To what extent do you agree with the following statements about tariffs on products and services?

% agreeing that the EU should respond to the U.S. with similar tariffs on products and services



% agreeing that the EU's response to Trump administration tariffs has been adequate



Consumers expect tariffs to bite, but won't swallow weaker EU standards

When it comes to tariffs, consumers consider that they would have a **negative impact on the cost of living** as well as on national and EU economies. This comes at a time when most households are just recovering from the covid and Ukraine crises and are already facing a new one due to the war in Iran.

Faced with these tensions, some consumers are already adjusting their behaviour. Around **44% say they have reduced or stopped buying American goods**, with the share rising to 55% in Denmark.



While some Europeans are willing to reconsider to some extent certain environmental regulations — often claimed to be disadvantaging American companies operating in Europe — they are less inclined to do so when it comes to digital legislation or food safety. **Respondents believe that EU digital rules should be preserved.**

To what extent do you agree with the following statements about tariffs on products and services?

Due to the Trump administration's policies, I have reduced or stopped buying products or using services from U.S. companies

24%

32%

44%

The EU should loosen its regulations on food safety if, in exchange, the U.S. eliminates tariffs

56%

19%

25%

The EU should loosen its regulations on digital protection if, in exchange, the U.S. eliminates tariffs

52%

22%

26%

The EU should loosen its regulations on environmental sustainability if, in exchange, the U.S. eliminates tariffs

Disagree
32%

Neutral
27%

Agree
41%

A momentum for European autonomy?

Support for strengthening Europe's strategic autonomy is strong.



Around **80% of respondents believe the EU should invest more in technology** to develop its own alternatives and reduce dependencies.



The same level of support (**73%**) **applies to the defence sector.**



Above all, **Europeans favour diversifying partnerships.** Eight in ten respondents believe that, in response to US tariffs, the EU should now seek new trading partners and negotiate additional trade agreements.

Hands off Greenland

When Washington set its sights on Greenland, European consumers didn't blink. **Seven in ten respondents (72%) back Denmark and Greenland** — even if has a negative impact on the economy.



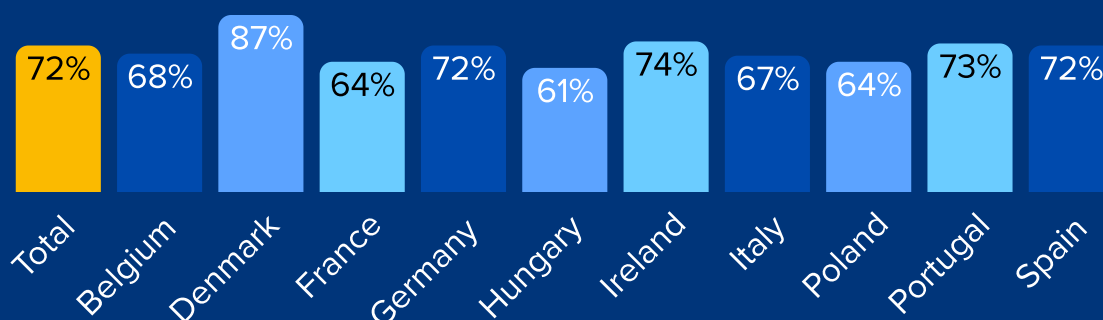
While European consumers seem to be willing to pay a price, the uncomfortable truth is: not any price.

A slim majority (51%) say member states should put their own economic stability ahead of political solidarity — rising to 55% in Germany. This isn't defeatism. It's a warning: **consumers across all financial situations will back the EU, but only if the EU backs them too.** The bloc cannot ask citizens to absorb economic pain without a credible plan.

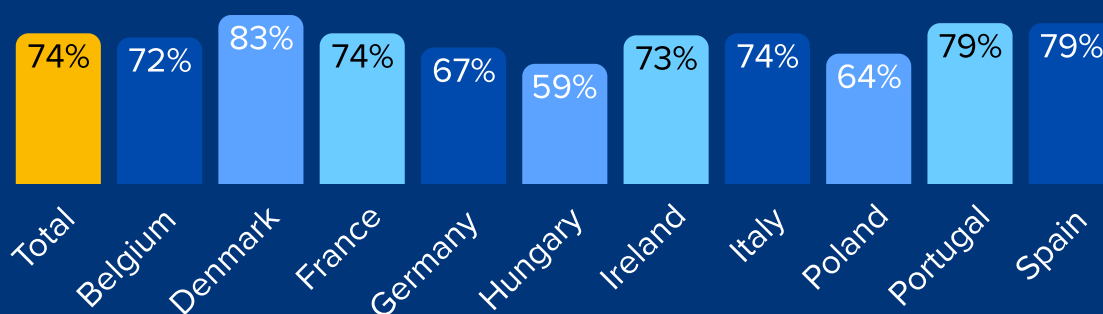


To what extent do you agree with the following statements regarding long-term EU-U.S. relations?

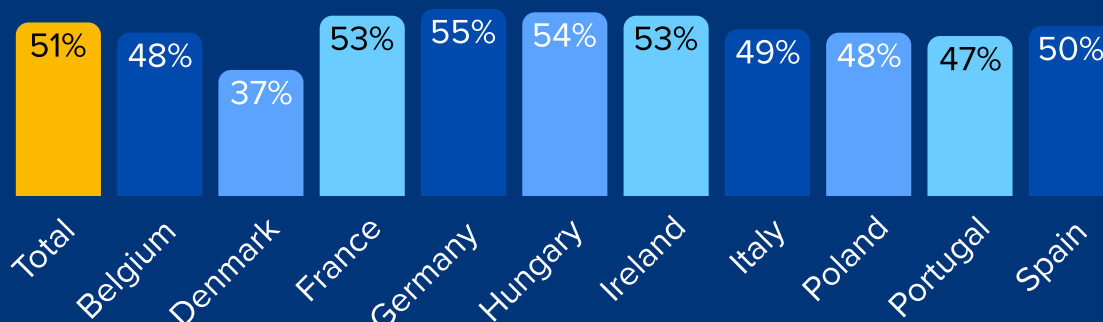
% agreeing that the EU should stand firmly with Denmark/Greenland despite the harmful impact on the economy (e.g. price increase of goods and services)



% agreeing that any U.S. sanction against an EU member state should be considered as a hostile act toward the EU as a whole



% agreeing that EU member states should prioritize their own economic stability over political solidarity



Consumers are clear on one thing: **US sanctions on any EU member state are an attack on all of them.** Almost three-quarters of those surveyed (74%) say sanctions against any EU member should be treated as a hostile act. That's not ambiguity — that's a mandate.

On Greenland: Act now or wait Trump out?

Nearly half (45%) say they want a European response now.

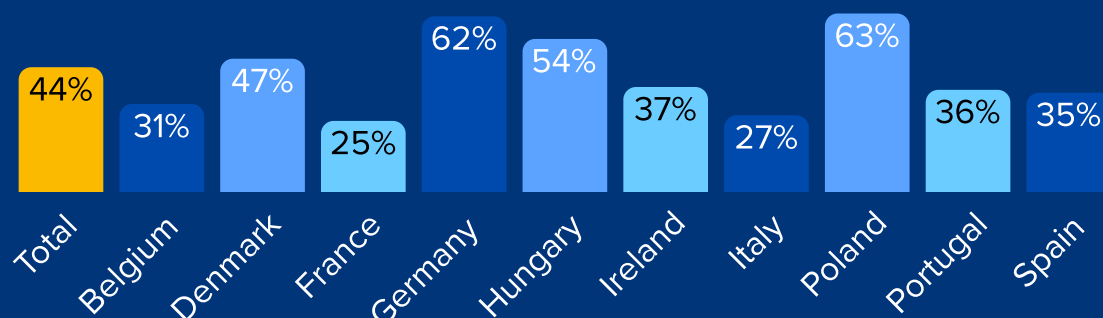
Only 28% would wait to see if the situation resolves when Trump is out of office. But with a more than a quarter still undecided, the window for leadership is open.

Respondents from countries like Italy (48%), Portugal (54%) and Spain (50%) are pushing for action. Also in Denmark, which was the most directly affected, consumers (35%) lean toward action over patience.

Despite this incident, **44% still back continued EU-US alignment, but that majority is fragile and conditional.** Germany and Poland anchors the pro-alliance camp at 62%, reflecting Berlin's deep economic and strategic ties with Washington. But respondents from Italy (40%) and France (38%) are already pulling away — and Spain and Portugal haven't made up their minds.

To what extent do you agree with the following statement regarding long-term EU-U.S. relations?

% agreeing the EU should remain aligned with the United States despite current tensions



Europeans aren't anti-American. **They're pro-European.** They want an EU confident enough to set terms, not just accept them.



3. Trade: Europeans want more of it — and they're not waiting for Washington

Europeans want to trade in and outside Europe — more of it, faster, and on their own terms. **Strong majorities back both new deals and completing the single market.**

Asia is the top priority, China is second, the US is middle of the pack

All respondents in this survey place **great importance on different trade partnerships across multiple regions** — from Asia over Africa and Latin America to the United States — to diversify dependence.

Which priority should the EU give the following policies?

% of respondents indicating it is a high priority



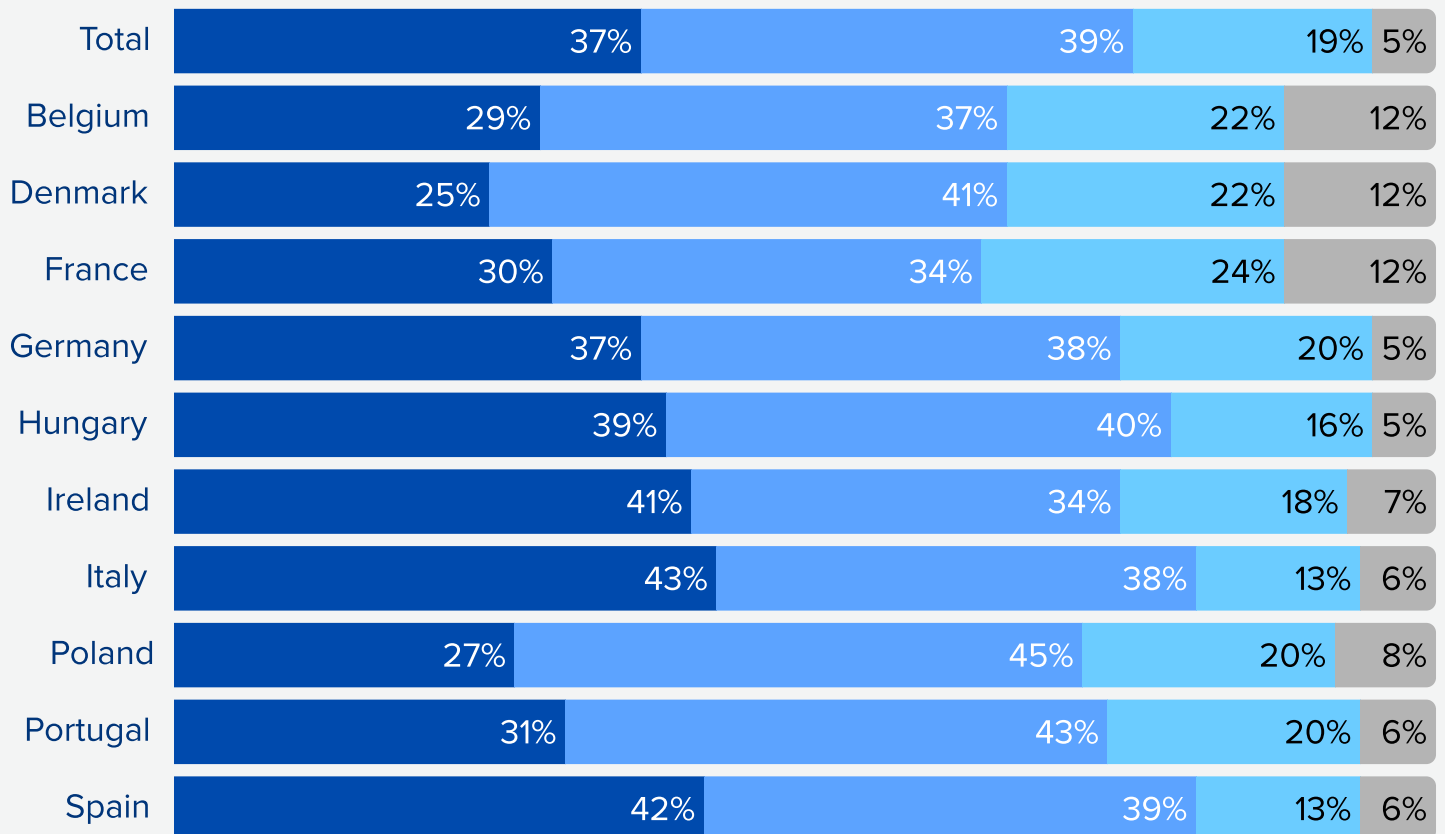
But they have some ideas on where to start first. 51% of consumers rank Asian countries like Japan and South Korea as a high priority to close the deal. **China comes in even ahead of repairing trade relations with the United States** — more European respondents list it as a high priority trading partner than America.



In the current geopolitical climate, that's a striking signal: **European consumers are pragmatists**. They see economic and strategic value where it exists, regardless of political friction.

Strengthen trade ties with China

● High priority ● Medium priority ● Low priority ● I don't know

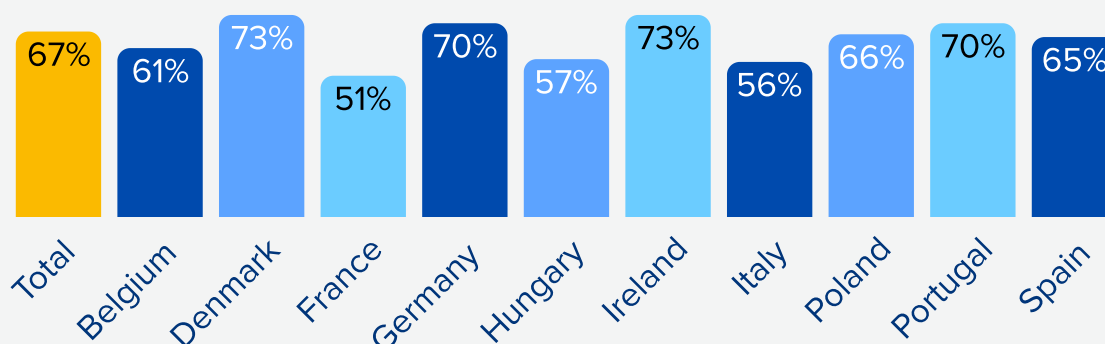


Trade deals aren't just policy — they're a lifeline to consumers' wallets

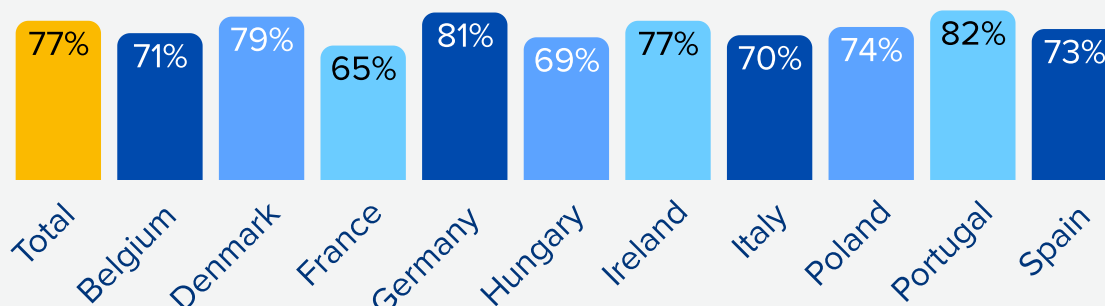
Two-thirds of those surveyed (67%) recognize that agreements unlock access to more products at better prices, directly responding to cost-of-living pressures and consumers' desire to have access to more products and services. But there's a clear geographical divide: Danish and Irish consumers are sold (73%), while French skepticism runs deeper at just 51%.

How much do you agree with the following statements regarding international (out of the EU) commercial relations?

% agreeing that commercial relationships between EU and non-EU countries give access to more products and better prices for consumers



% agreeing that commercial relationships between EU and non-EU countries offer opportunities for EU companies to export



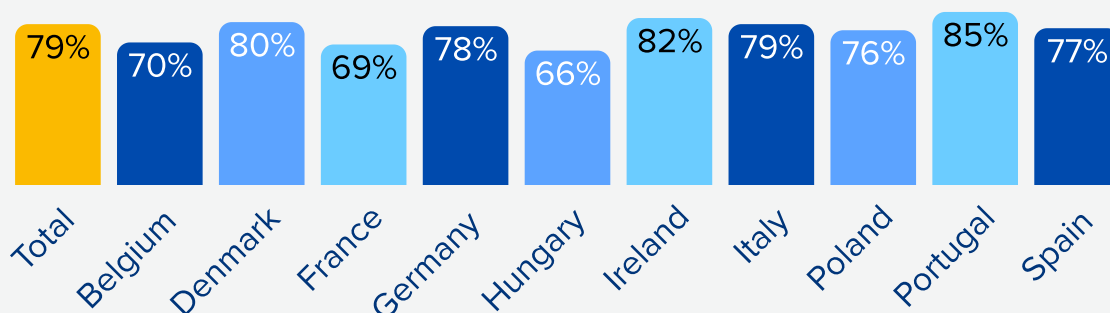
At the same time, consumers are not afraid to look beyond their own wallet - they do see the bigger economic picture. When it comes to potential export opportunities for EU businesses, confidence soars to 77%. **Consumers get it: trade is a two-way street.** France remains the outlier at 65%.

Geopolitics through the grocery aisle

Here's where it gets interesting: **79% see trade deals as diplomatic tools, not just economic ones.** Consumers understand that commerce builds alliances. Ireland (82%) and Portugal (85%)—smaller nations that have thrived through openness—lead the charge.

How much do you agree with the following statement regarding international (out of the EU) commercial relations?

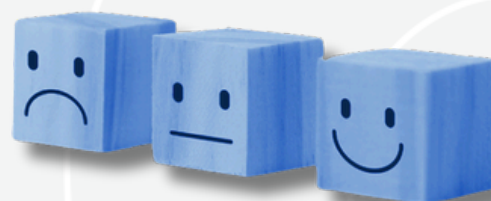
% agreeing that the trade deals are a good way to build new political/strategic partnerships with non-EU countries



The quality paradox

Ask consumers whether trade deals mean lower product and service quality and safety in the EU, and you'll see a fascinating split:

- **38%** worry,
- **37%** shrug,
- **25%** dismiss the concern entirely.



France leads in its concern with 43% of respondents agreeing with the statement, while Portugal pushes back hardest, with a third disagreeing.

Yet nearly half (**47%**) **believe trade deals will actually raise global quality standards** — the "Brussels effect" in action. Consumers trust the EU to export its muscle.

Mercosur: the Litmus test

Mercosur crystallises these tensions perfectly.

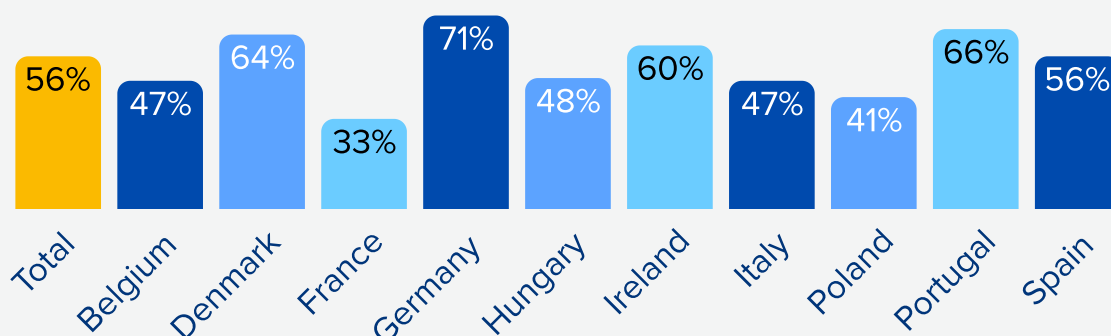
A majority (56%) back it as a partnership-builder, with German respondents enthusiastically leading at 71%. Portugal (66%), Denmark (64%), and Ireland (60%) are also in strong agreement.

Meanwhile, France has a perfect three-way split: a third opposed, a third uncommitted, a third supportive.



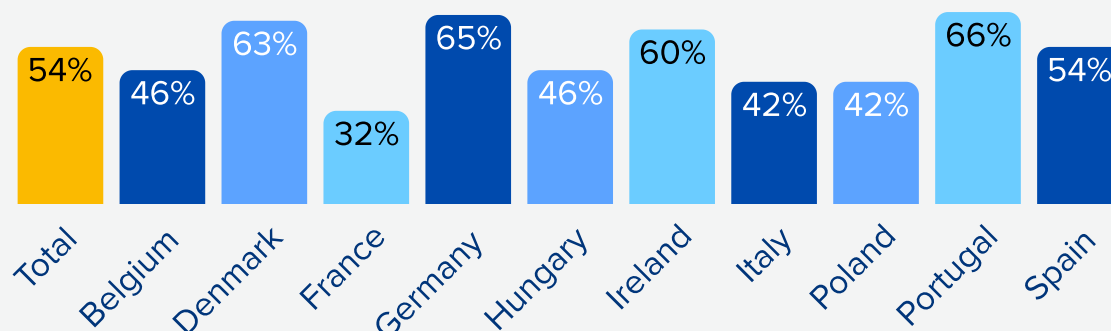
How much do you agree with the following statements regarding international (out of the EU) commercial relations?

% agreeing that the trade deal between the EU and Latin-America (Mercosur) is a good way to build new partnerships



On prices, the pattern repeats: **54% agree that Mercosur will secure access to more goods at better prices**, led by Portugal (66%), Germany (65%) and Denmark (63%). French consumers are again divided here.

% agreeing that the trade deal between the EU and Latin-America (Mercosur) is a good way to secure access to more products and better prices



But quality fears spike when Mercosur gets specific: **42% worry about inferior products flooding in**, jumping to 59% in France. Still, 30% of German respondents actively reject this concern, suggesting confidence in existing safeguards.

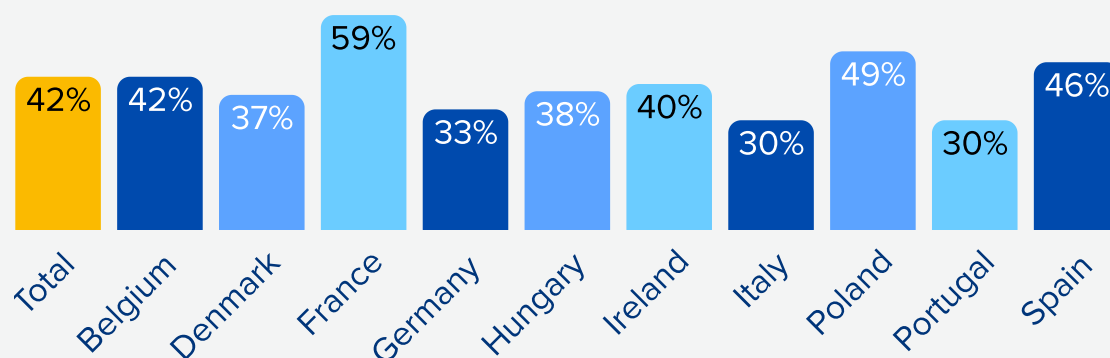
It is clear: **consumers want international trade — but they also want reassurance**. The appetite exists, especially for affordability and geopolitical partnerships.



The challenge? Demonstrating that opening markets doesn't mean opening the floodgates to substandard goods.

How much do you agree with the following statements regarding international (out of the EU) commercial relations?

% agreeing that the trade deal between the EU and Latin-America (Mercosur) will lead to products of lower quality and safety available in the EU



4. Europe first?

Completing the EU Single Market

Stepping up external trade is just one piece of the puzzle. Respondents equally believe **deepening trade within Europe's Single Market is a must have**.

In fact, if push came to shove and they had to choose sides, **52% give a high priority to the completion of the EU's internal market over focusing on agreements with countries outside the EU**.

Both instincts point to the same conclusion. **Europeans know their economic weight isn't being fully used** — whether through unfinished internal architecture or untapped external partnerships. They want that to change.



Made in Europe: the will is there, the wallet is complicated

It appears Europeans stand ready to buy European. **76% of respondents say EU consumers should prioritise products and services made at home**, with Italy, Portugal and Spain leading the charge.

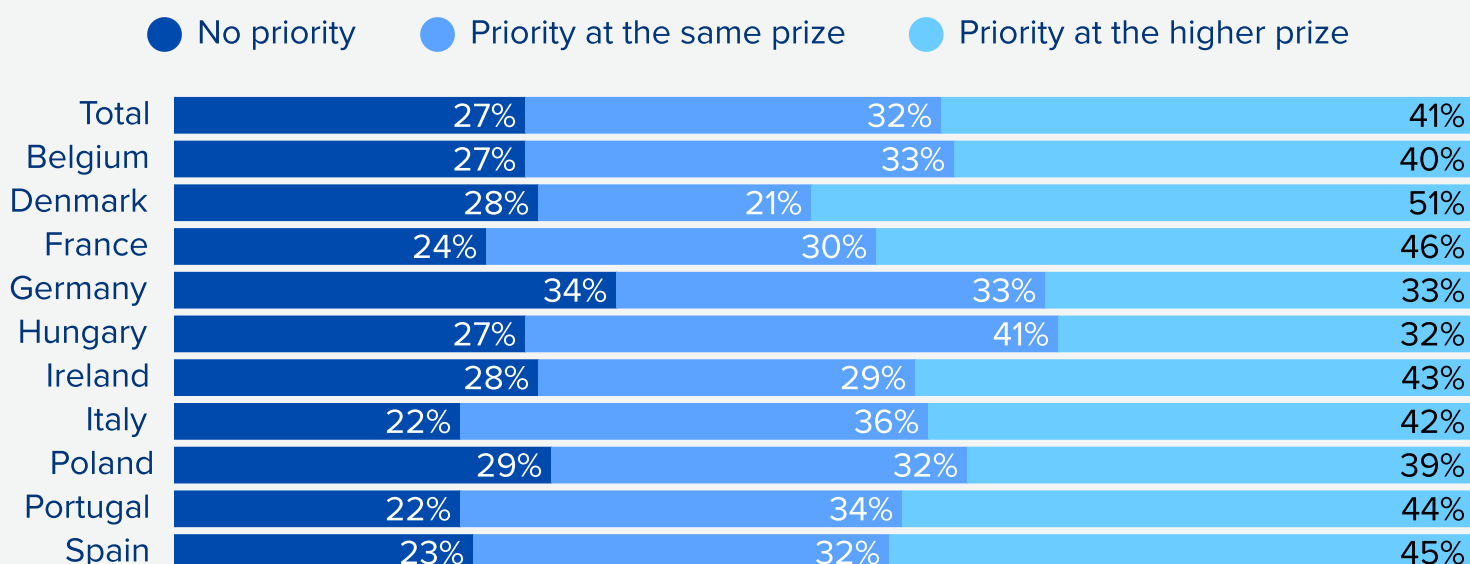
At the same time over 1 in 5 consumers in Belgium (21%), Denmark (23%), Germany, (23%), Hungary (21%), Ireland (23%) and Poland (22%) are neutral towards the idea.



But sentiment and spending are different things. Only half (49%) are actually willing to pay more for EU-made goods. The rest want European — at the right price. When you dig into the data, the picture sharpens: 32% would back EU products if the price is equal, and 41% would pay a premium.

But **27% won't prioritise EU goods at all** — and in Germany, that sceptical camp is the largest single group (34%). Hungary tells a different story: most Hungarians will back EU goods, but only if it doesn't cost them more.

The opinion on the need to prioritize buying EU products and the willingness to pay more for these products



This isn't hypocrisy. It's a cost-of-living signal the EU cannot afford to ignore.

Europeans are willing partners in the project of economic sovereignty — but they need it to be affordable.

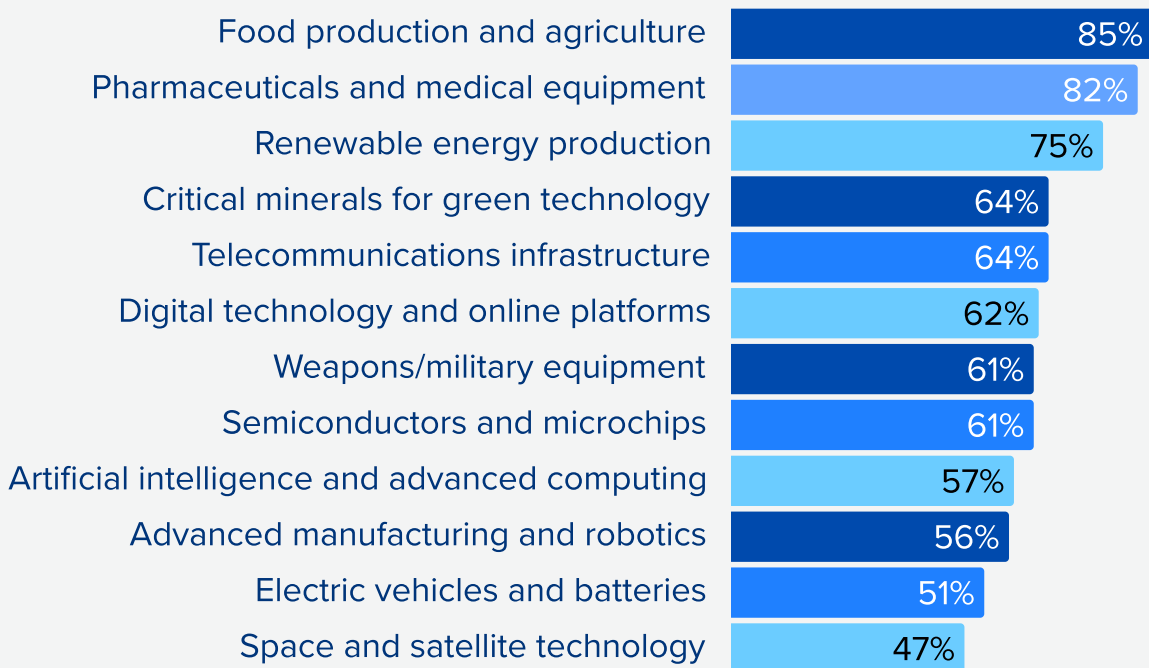


Less vulnerability, more strategic autonomy

On the big strategic picture, there's near-consensus. Europeans don't just want to buy European — **they want the EU to make European and secure a strategic autonomy.**

Respondents attach high importance to developing independent capabilities in key sectors: **food production (85%), pharmaceuticals (82%), and renewable energy (75%).** These aren't niche concerns; they're the foundations of a self-sufficient continent, and the public knows it.

% saying it is highly important for the EU to develop independent capabilities in the following areas



5. Navigating disruptive times and a fragmented world

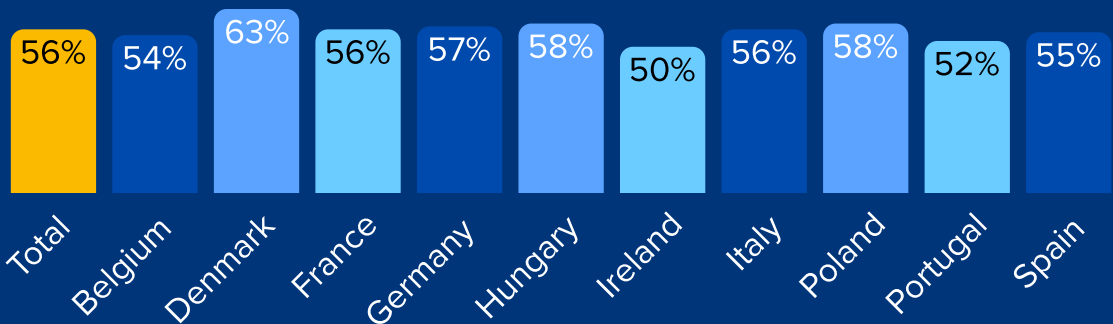
A distant storm for most Europeans

When the survey was carried out at the end of February 2026, most consumers reported **feeling insulated from global turbulence**.

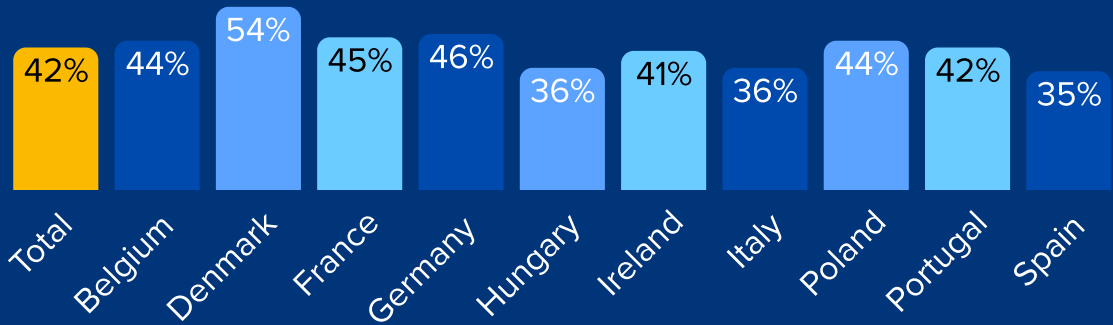
Two-thirds (66%) say international events have little impact on their social lives, while majorities report minimal effects on their mental health (56%) and overall quality of life (50%). Even financially, 42% see the global context as largely irrelevant to their household bottom line.

How much does the current international context impacts your daily life?

Low impact on mental health (stress, anxiety)



Low impact on household financial situation



Europeans fear a worsening world but believe EU values will endure



Even before the outbreak of war in the Middle East, consumers were not feeling optimistic about what 2026 has in store

- **72%** think the cost of living crisis will get worse
- **51%** think the security of the EU will get worse
- **69%** the overall state of the world will get worse



They do see staying power in the core EU values of equality, democracy and the defence of human Rights

- **49%** think equality in the EU will stay the same
- **54%** think human rights in the EU will stay the same
- **47%** Democratic values in the EU will stay the same

Given the current international context, how do you think the following aspects will evolve in 2026?

Cost of living	Will get worse	72%
	Will stay the same	22%
	Will get better	6%
Security in the EU	Will get worse	51%
	Will stay the same	37%
	Will get better	12%
Equality in the EU	Will get worse	40%
	Will stay the same	49%
	Will get better	11%
Human rights in the EU	Will get worse	33%
	Will stay the same	54%
	Will get better	13%
Democratic values in the EU	Will get worse	38%
	Will stay the same	47%
	Will get better	15%
Overall state of the world	Will get worse	69%
	Will stay the same	21%
	Will get better	10%

French and Portuguese consumers tend to be the least optimistic across all areas, while the Danes appear to be the most positive. Irish and Portuguese consumers are particularly concerned with the cost of living, with 81% and 83%, respectively, thinking it will get worse in 2026.

To top it all off, **about one out of three respondents believe it is likely the EU will enter a new World War in the next 3 years**. And this was even before the war in Iran broke loose.

How likely do you think that the EU will go to war in the next 3 years?

War with Russia	Unlikely/Impossible	54%
	Likely/Certain	33%
	I don't know	13%
War with the U.S.	Unlikely/Impossible	72%
	Likely/Certain	17%
	I don't know	11%
World war	Unlikely/Impossible	56%
	Likely/Certain	30%
	I don't know	14%

Bringing the consumer voice into Europe's global debate

This survey was conducted to answer a simple question: **how do consumers see themselves and the role of the European Union in an increasingly disruptive world?** Too often, geopolitical debates focus on governments, institutions or businesses, while overlooking one of Europe's greatest assets: its 450 million consumers.

Through this research, **Euroconsumers aims to bring their voice into these high-level discussions that are shaping the future of Europe.** As a global group of six national consumer organisations in Belgium, Spain, Italy, Portugal, Brazil and Poland, representing more than six million people, we have a direct line to consumers and a clear understanding of their expectations, informed by our surveys and daily engagement.

The findings show that consumers are pragmatic and forward-looking. They support open markets and international trade, recognising that agreements can bring better prices and more choice. At the same time, they are clear that openness should not come at the expense of strong standards, trustworthy products and strategic autonomy.

Consumers also want a Europe that is stronger and more innovative. Large majorities support investing in technology, reducing strategic dependencies and diversifying partnerships. Europeans are not asking the EU to retreat from the world, they want it to engage with confidence while protecting the values and standards that define it.

For Euroconsumers, this reflects a fundamental belief: **empowering consumers and improving markets go hand in hand.** Consumers do not only need protection, they also expect innovation. When empowered, they can push markets to deliver better products, stronger competition and solutions that match their everyday needs.

This is why bringing the consumer perspective into global economic debates is essential. Many people feel distant from discussions about trade, strategic autonomy or geopolitics. As a consumer organisation with a direct link to millions of citizens, we see it as its responsibility to **bridge that gap and ensure that their voice is heard.**

Methodology

The survey was conducted between February 19 and 23, 2026, across 10 European countries: Belgium, Denmark, France, Germany, Hungary, Ireland, Italy, Poland, Portugal, and Spain.

Approximately one thousand respondents aged 18–74 were involved in each country through an online self-administered questionnaire, for a total of 9 995 valid responses.

Samples were stratified a priori using interlocked quotas for age, gender, and geographical area. To ensure representativeness, a weighting procedure was then applied to align the samples with national population distributions by age, gender, educational attainment, and geographical area.

About Euroconsumers

Gathering six national consumer organisations and giving voice to a total of more than 7 million people in Italy, Belgium, Spain, Portugal, Poland and Brazil, Euroconsumers is the world's leading consumer group in innovative information, personalised services and the defence of consumer rights.



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