Nomad Foods

Frozen in Focus

2026

Contents

About this report

Frozen in Focus is Nomad Foods' flagship report into the role frozen food plays in the lives of European consumers and the broader food system that serves them. This second edition moves the conversation beyond consumer habits and perceptions to examine frozen food's contribution to three of the most pressing challenges in food today: better choices, reducing waste, and the move to more resilient food systems.

The report is structured around three chapters. The first explores the gap between how frozen food is perceived and the genuine role it plays in supporting better, more attainable food choices. The second examines access in practical terms, not just price, but flexibility, waste reduction and the ability to make good food go further. The third looks at frozen food through the lens of food security, exploring how frozen supply chains contribute to stability in an increasingly uncertain environment.

Each chapter is underpinned by original consumer polling conducted across the UK, France, Germany, Italy, Croatia and Sweden in spring 2026, alongside desk research and data analysis.

Nomad Foods is Europe's leading frozen food company. This report reflects our commitment to using our position and insight to contribute to the conversations that matter.

Foreword

Food is one of the most fundamental parts of everyday life. However, the conditions under which people access it are becoming more complex and more demanding.

For many households across Europe, decisions about what to eat are no longer simple. A parent finishing work late may be deciding in minutes whether they have time to cook from scratch, whether they can afford certain ingredients that week, or whether their children will actually eat what is being prepared. These decisions are shaped by a combination of time constraints, rising costs, access and availability, and concerns about nutrition. They also reflect a wider food system under strain. Climate volatility, nature degradation, geopolitical disruption, and increasingly complex supply chains are changing the way food is produced, distributed and consumed.

In this context, the conversation around food needs to reflect how people actually live. It must move beyond idealised assumptions and focus on what's practical, accessible and achievable for households.

Frozen food is already a central part of that reality.

A household managing a tight budget or unpredictable schedule can rely on frozen ingredients that are available when needed, reduce waste by using them over time, and still support balanced, home-cooked meals.

At the same time, frozen supply chains provide stability within a food system that is becoming more uncertain. The cold chain enables food to be stored, transported and accessed in ways that fresh, just-in-time models, cannot always replicate.

Yet this role is still not fully recognised. Frozen food remains under represented in many of the debates and policy discussions shaping the future of food – whether that is around nutrition, access, or food system resilience.

Frozen in Focus is intended to address that. This year's report sets out a clear picture of how frozen food provides access to high quality, tasty food; how it helps households navigate everyday pressures; and how it contributes to a more resilient and secure food system. The report draws on new consumer research across Europe, alongside wider data and analysis, to provide a stronger evidence base for a more informed conversation.

The conclusion is clear: frozen food is not a compromise. It is a practical, trusted and increasingly important part of how Europe feeds itself.

As an industry, we have a responsibility to ensure this role is more clearly understood and reflected, for the benefit of the people we serve. If we are serious about improving access to good food and building more resilient supply chains, then frozen food must be at the centre of that conversation.

This report is our contribution to driving that discussion forward.

Dominic Brisby,
Chief Executive Officer, Nomad Foods

Nomad Foods at a glance

Europe's leading frozen food company

Our portfolio

Vegetables and protein make up **two thirds** of our revenues

Consumer favourite brands include:

Our largest markets include the UK, Germany, Italy, France, Sweden, and Croatia

23 **markets across Europe**

15%

Share of Western Europe's

€26.3bn

savoury frozen food market

€3 billion

Annual net revenues

7,500+

employees

c.500

Farmers worked with directly across 6 countries

88.1%

of total net sales from products classified as Healthier Meal Choices

96%

of fish and seafood certified to leading third-party standards (MSC/ASC)

97%

of vegetables, potatoes, fruit and herbs sourced from sustainable farming practices

Chapter 1: Better Food, Better Choices

Frozen food is already helping people eat better. The problem is people don't always realise it. Frozen food isn't a compromise on taste, quality or nutritional value. In many cases, it can be the better choice. But across Europe, consumers still default to fresh, often out of habit rather than evidence. Frozen food is a core part of how households now manage modern life. It offers flexibility, reliability and access to good food that fits around busy routines. New consumer research commissioned by Nomad Foods and conducted by Focaldata shows that this reputation challenge remains significant. The research surveyed nationally representative samples of consumers across six European markets, with 2,000 respondents in each of the UK, France, Germany, Italy and Sweden, and 750 respondents in Croatia.

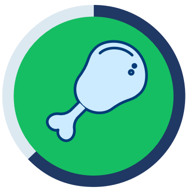
The findings point to a clear perception gap around nutrition. Across Europe, many consumers still assume fresh food is inherently more nutritious than frozen, with 65% believing fresh potatoes are more nutritious than frozen, and similar assumptions seen for chicken and fish.[1]

Fresh still assumed to be more nutritious than frozen

65%

say fresh cooked potatoes are more nutritious than frozen

63%



say fresh chicken is more nutritious than frozen

63%

say fresh fish is more nutritious than frozen

Frozen is trusted in familiar categories

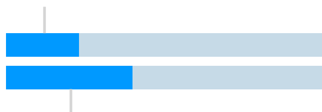
51%

say frozen sweetcorn is at least as nutritious as fresh

63%

say frozen peas are at least as nutritious as fresh

23% say frozen is more nutritious



around 40% say it is equally nutritious

Yet freezing is a natural preservation process that helps lock in nutrients, particularly where produce is frozen shortly after harvest, because they avoid the nutrient losses that can occur during transport, storage and time spent. Comparing markets shows how closely perceptions are linked to habit and category familiarity. **Germany records some of the most favourable views of frozen food, particularly around categories such as spinach and white fish, while the UK shows stronger confidence in frozen staples like peas and sweetcorn.[1] France remains the most positive market overall on the nutritional value of frozen food, while Croatia is more sceptical across several savoury categories.[1]** This suggests that perceptions of frozen food are not fixed. They vary by market, by product and, crucially, by how normalised frozen food already is within everyday cooking habits.[1]

The gap is not simply about awareness; it shapes the choices people feel confident making. When fresh is assumed to be 'better' by default, consumers may overlook frozen options that offer better nutrition, greater flexibility and less waste. This matters most when households are under pressure. With time and budgets stretched, outdated perceptions of frozen food risk narrowing the choices available, rather than helping people make the most of them.

Helping families eat their greens

Healthy eating doesn't happen in ideal conditions. It happens in the middle of busy, time-pressured family life and that's where frozen fits. **Among consumers cooking for children aged 16 or under, 82% of consumers polled said they regularly add vegetables into meals in less noticeable ways, including through sauces, soups and smoothies.** Mixed vegetables were the most used option, selected by 73% of respondents.[1]

This behaviour points to a broader truth about healthier eating: families are not seeking perfection, but practical ways to build better habits consistently.

Frozen vegetables are well suited to these routines. When flash-frozen shortly after harvest, they lock in nutrients at their peak, preserving essential vitamins and minerals that would otherwise degrade. They are also easy to portion, quick to prepare and available when needed, helping households add vegetables with high levels of vitamins and minerals into everyday meals with less waste and greater flexibility. In this context, frozen food is not simply a convenient option; it is a practical enabler of better family eating habits.

82%

said they regularly add vegetables into meals in less noticeable ways, including through sauces, soups and smoothies.

73%

Used mixed vegetables, making them the most used option.[1]

Labels that must make sense

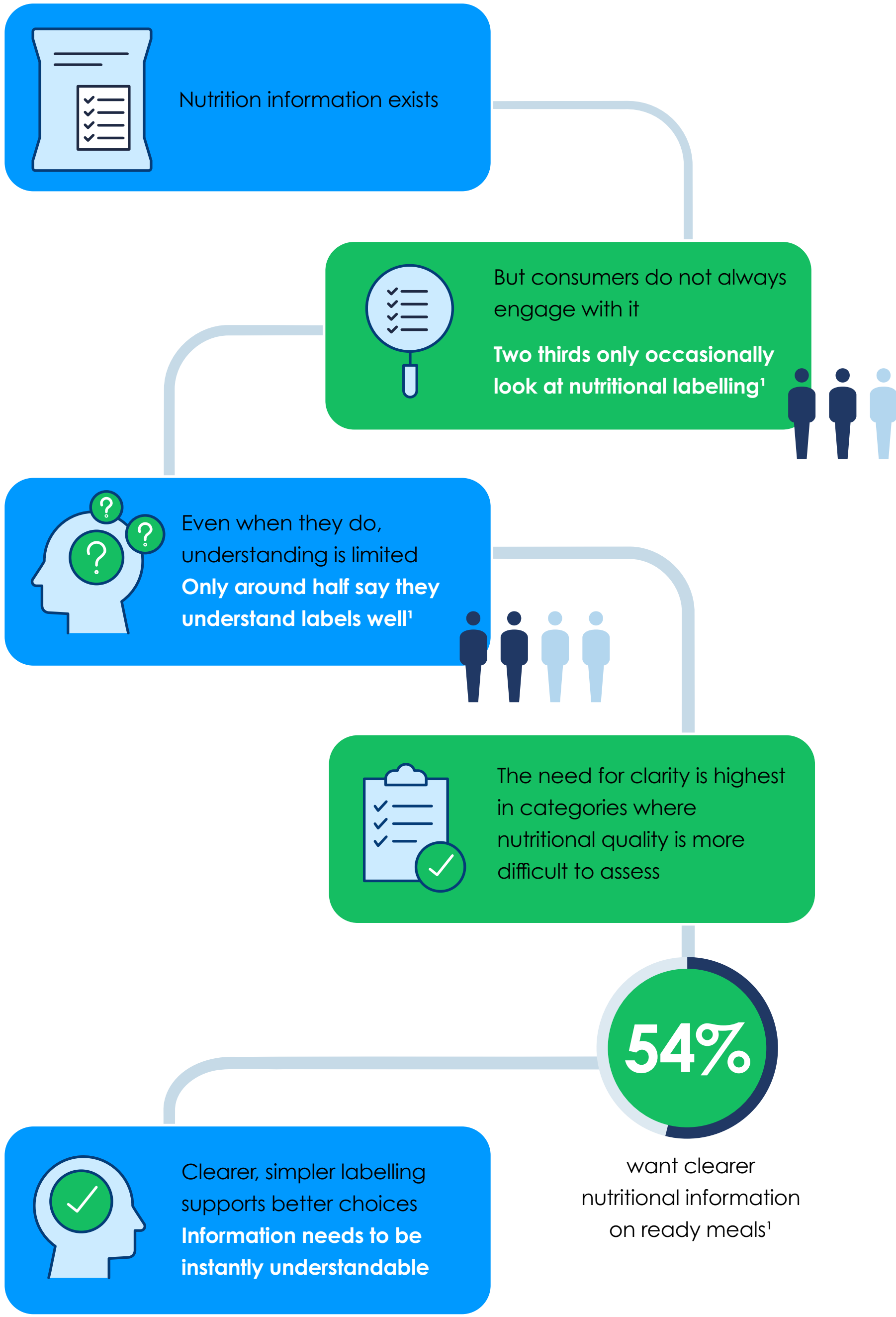
Across Europe, many consumers are not fully engaging with nutritional labelling. Two-thirds of consumers only occasionally look at nutritional labels, while only around half say they understand them well.[1] At the same time, consumers identify clear gaps in the information currently available, particularly for categories such as ready meals.[1]

This isn't a lack of interest; it's a failure of clarity. This is what creates a clear barrier to better food choices. Labels are intended to support informed choices, but when they are too complex, inconsistent or difficult to interpret, they primarily benefit those who already know how to navigate them.

Ready meals stand out as the category where consumers most want clearer nutritional information, selected by 54% of respondents across Europe.[1] This suggests that consumers are particularly looking for clarity in categories where food is more pre-prepared, or harder to analyse at a glance based on their numerous components, so their nutritional value is less immediately clear.

There are significant differences between markets too. **Attention to nutritional labels is highest in France, where almost half of consumers check labels regularly, and in Italy, where the figure is over 40%. By contrast, only 20% of consumers in Croatia report checking labels frequently.**[1] Understanding also varies, with Croatia notably lower than other markets: only 30% of consumers say they understand nutritional labelling well, compared with around half or more in most other markets.[1]

However, better food choices don't come from more information. They come from clearer, more accessible information that works in real life. It is widely considered that clearer, more consistent labelling across Europe would help consumers engage with nutrition and make better choices quickly and confidently.



Chapter 2: Good Food Made Accessible

Fresh food is often treated as the default choice for households across Europe, with supermarket layouts designed so shoppers encounter fresh produce first. But the real cost of fresh food is not only what consumers pay at the checkout; it is also what they lose when food is thrown away before it can be used. Across every market surveyed, consumers were more likely to say they waste fresh fruit and vegetables than frozen equivalents. **On average, half of consumers across the UK, France, Germany, Italy, Sweden and Croatia say they throw away fresh vegetables at least monthly**, compared with fewer than three in ten for frozen vegetables. A similar pattern is seen for fruit, where fresh is discarded more frequently than frozen across markets.

The UK provides one of the clearest examples of this waste gap. Just 16% of UK consumers say they never throw away fresh vegetables, compared with 36% who say they never discard frozen vegetables. For fruit, the pattern is similar: 16% say they never throw away fresh fruit, compared with 31% for frozen fruit. The direction is consistent: fresh food is harder to manage over time, particularly for households juggling busy routines, unpredictable schedules and rising costs. The cheapest food is the food people actually eat. Frozen changes the equation by lasting longer and allowing households to use what they need, when they need it. For consumers trying to make budgets go further, frozen is not just a convenient option; it is a practical way to keep more value in the food they buy.

That difference in food waste translates directly into savings. **Consumers estimate that making better use of frozen food can save between €364 and €624 per year, simply by reducing waste and avoiding unnecessary purchases.**[2] What is often framed as a question of price is in reality a question of usage. The freezer allows households to stretch budgets, extend value, spread cost over time and make food go further. This is where frozen food plays a distinctive role. It reduces pressure to use food immediately, extending the time between shopping trips and giving households greater control over how they plan and prepare meals. In a cost-of-living context, the freezer is not just a storage option, but a practical financial tool that helps households manage everyday pressures more effectively. And when it comes to everyday decisions, not just budgets, people are already acting on this.

Frozen food helps households stretch budgets

36%

of European consumers say frozen food helps them **save money**

Up to

€624

or **£539**

saved per household each year through better use of food in their freezer

Convenience not compromise

Convenience is often discussed as a compromise. In reality, it is how people access good food in everyday life. **Across Europe, when time is short and households need dinner quickly, 51% of consumers rank finding something in the freezer among their top two choices, compared with just 30% who turn to takeaway.**[1]

This behaviour is consistent across markets, particularly in countries such as Sweden and the UK, where rather than defaulting to external food options, households are increasingly relying on what they already have at home. **In Sweden and the UK, around six in ten consumers place the freezer among their top two choices when short on time. Italy, France and Germany followed closely at around half of respondents, while Croatia was lower at 36%.**[1]

The freezer has therefore quietly become Europe's most reliable food option. Meals and ingredients that are ready when needed, flexible to use and available on demand allow households to cook quickly without sacrificing quality. This is not about cutting corners, but about making everyday food work within the realities of modern life.

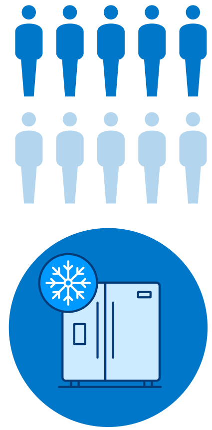
This shift is reinforced by changing cooking habits. The rise of faster cooking methods, including widespread adoption of air fryers in markets such as the UK, is making frozen food even more integrated into daily routines. Consumers estimate they can save significant sums, up to €1,200 / £1,000 annually, by replacing takeaway meals with frozen alternatives.[1]

There is also growing evidence that frozen food provides options that people feel proud to serve. **Across Europe, 28% of consumers admit to serving frozen food while claiming it was homemade.**[1] Far from being trivial, this behaviour reflects trust. Frozen food is now being widely embedded and used confidently, rather than being used solely as a fallback option.

In this context, convenience is not separate from access. It is central to it. Frozen food provides a reliable, flexible way for households to access good food on their own terms, whether that is saving time, reducing effort or making meals more predictable.

Frozen beats takeaway when time is tight

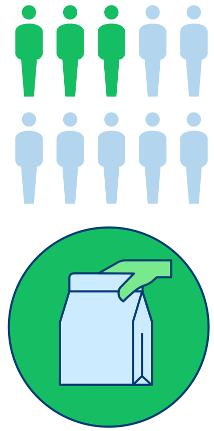
When consumers are short of time and need dinner quickly



51%

rank finding something from the freezer in their top two choices

while only



30%

rank takeaway delivery or collection in their top two choices.[1]

The fish gap

Fish is one of the most nutritionally unique foods in the European diet. Today, fish is often included in government dietary guidelines as a key source of lean protein, omega 3 fatty acids, and essential nutrients that support heart and brain health. Public health recommendations typically also encourage eating fish regularly to help reduce the risk of chronic diseases.

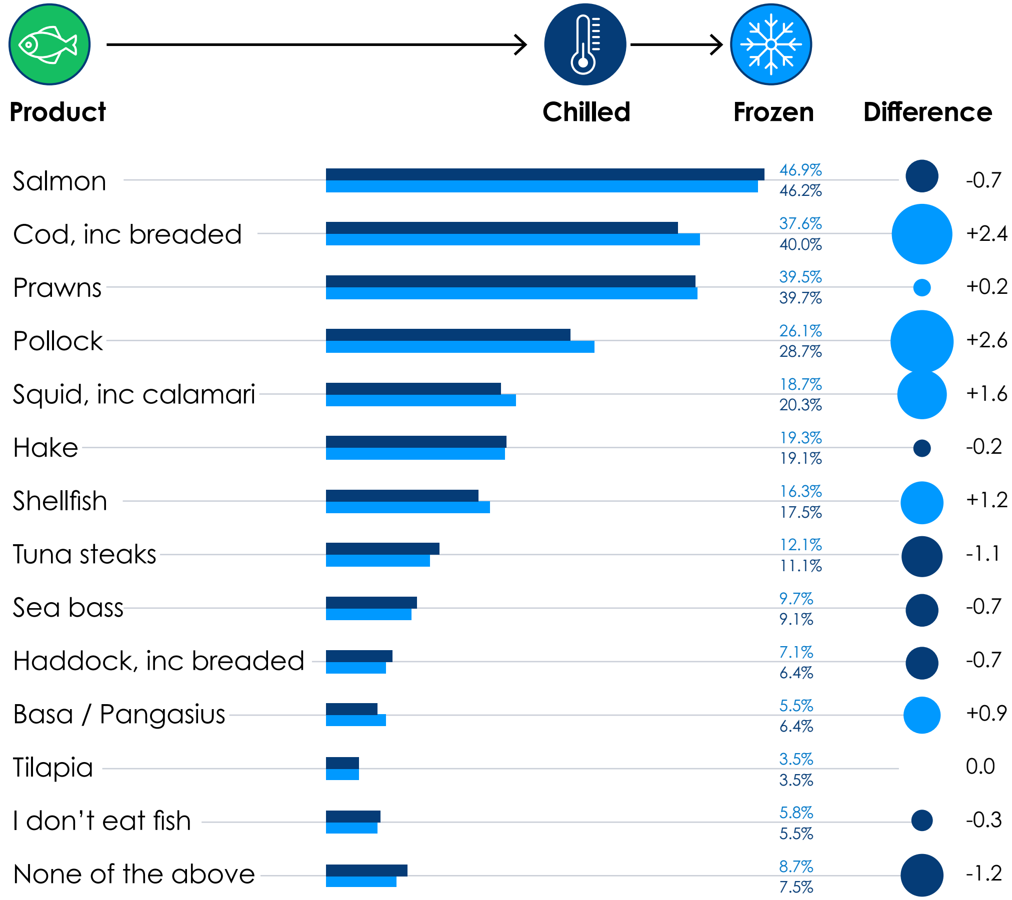
It is also one of the clearest examples of the role frozen food can play in improving access to this important everyday protein. Looking at whitefish consumption across cod and pollock combined, including both chilled and frozen formats, patterns vary significantly between markets. Germany and France report the highest consumption levels at 41% of responders, followed by Sweden at 23% and Italy at 16%, while the UK and Croatia record lower levels at 8% and 2.5% respectively.[1]

These differences matter because they show that access to fish is shaped by affordability, local food cultures, and access to a variety of options. Frozen fish does not play a single role across Europe. In some markets it supports stronger white fish consumption, while in others it acts as an important, accessible route to affordable seafood products.[1]

Salmon shows a different pattern. Sweden stands out as the only market where reported consumption of salmon was higher in frozen form than fresh, with 68% of Swedish respondents having prepared frozen salmon, compared with 61% who had prepared it fresh. France was the next highest market for frozen salmon consumption, at 48%. This suggests that in some markets, frozen is not simply an alternative to fresh fish, but a normalised and trusted route to eating high-value proteins.

The UK remains a particularly distinctive case. Nearly twice as many respondents reported eating none of the listed fish varieties in chilled form compared with frozen, suggesting frozen fish is the primary route to consumption for many households. For a significant share of UK households, the freezer is therefore a primary route to fish consumption. The largest uplifts between chilled and frozen consumption were seen in breaded cod, haddock and prawns - everyday products that anchor fish consumption for many families. The UK's long-standing frozen fish culture, shaped by products such as Birds Eye fish fingers and breaded fillets, means frozen food plays a particularly important role in maintaining affordable and accessible fish consumption.

At a European level overall, there was little difference between the proportion of consumers eating fish in chilled versus frozen form. But the market-level differences matter. They show that frozen fish plays different roles in different food cultures: supporting cod consumption in several markets, enabling particularly strong salmon consumption in Sweden, and acting as a key access route to fish in the UK.



This matters because maintaining access to fish in the freezer is becoming just as important as maintaining it in the chilled aisle. Where consumers access fish differs between markets, but the goal is the same: ensuring nutritious proteins remain affordable, accessible and part of everyday diets.[1]

Chapter 3:
Securing Tomorrow's Plate

Food security isn't just about how food is grown, it's about whether it lasts. Frozen food is what makes that possible. Climate volatility, nature degradation, geopolitical disruption and sustained price pressure have put supply chains under scrutiny in ways not seen for a generation, and more visible to the public eye. Put simply, the conversation has moved from narrow questions of self-sufficiency to broader concerns about resilience.

When shocks hit the food system, whether through climate disruption, conflict, inflation or poor harvests, consumers experience it in very practical ways: higher prices, reduced choice and less reliable access to nutritious food. Frozen food already plays a central role in that resilience, even if it is rarely recognised as such.

The backbone nobody talks about

The cold chain, the unbroken refrigerated sequence that carries food from harvest or catch to the consumer's freezer, is rarely mentioned in debates on food systems and yet is integral infrastructure to global food security.

It quietly prevents disruption from turning into shortages. Longer shelf life, stable storage and the ability to hold stock for months, rather than days, helps smooth volatility before it reaches consumers through empty shelves or sudden price spikes.

The global data on what happens without adequate refrigeration makes the stakes clear. **According to the FAO, 526 million tonnes of food, around 12% of the global total, are lost or wasted each year due to insufficient refrigeration.**[4]

Cold chain infrastructure is therefore, one of the single most effective interventions available to reduce food waste. Furthermore, it can also reduce the emissions associated with it. A Nomad Foods lifecycle analysis found that most frozen products have an equal or lower carbon footprint than fresh or chilled equivalents, despite the higher levels of energy required for freezing and storage. The key factor here is waste: where frozen products reduce food loss and waste at retail and in the home, those avoided emissions can outweigh the additional energy use of the frozen supply chain.[5]

The cold chain is also becoming more efficient. Nomad Foods is part of an industry initiative, The Move to Minus 15, looking to raise frozen storage temperatures from -18°C to -15°C. Testing shows no significant product change at the higher temperature, while every 3°C increase reduces energy consumption by approximately 10 to 11%.[6]

Frozen supply chain resilience

Europe's food system is deeply exposed to international supply chains, and that dependency is particularly visible in categories where volatility is already a serious concern. In seafood, the EU remains structurally import-dependent: in 2024, extra-EU imports of fishery and aquaculture products totalled 5.95 million tonnes, worth €29.87 billion, with imports accounting for the majority of supply in key species including salmon, tuna, shrimp, Alaska pollock and cod.[7]

That exposure is not limited to protein. EU agri-food imports reached €213.5 billion in 2025, up 9.3% year-on-year, while bakery and farinaceous products have been identified among the food and drink sectors with the highest growth in EU imports.[8] Together, these trends point to a food system under pressure across both protein and carbohydrate supply chains.

Frozen supply chains are structurally better equipped for managing that exposure. The ability to hold stock and plan across months rather than days provides a buffer that fresh, just-in-time supply cannot replicate. When disruption arrives upstream, frozen stocks absorb some of the impact while the system adjusts, supporting continuity of supply for consumers.

That buffering capacity is practical, proven and still too often peripheral to food security strategies built primarily around fresh domestic production. Fresh supply chains move quickly. Frozen supply chains hold steady. That difference is what creates resilience.

Turning seasonal food into the everyday

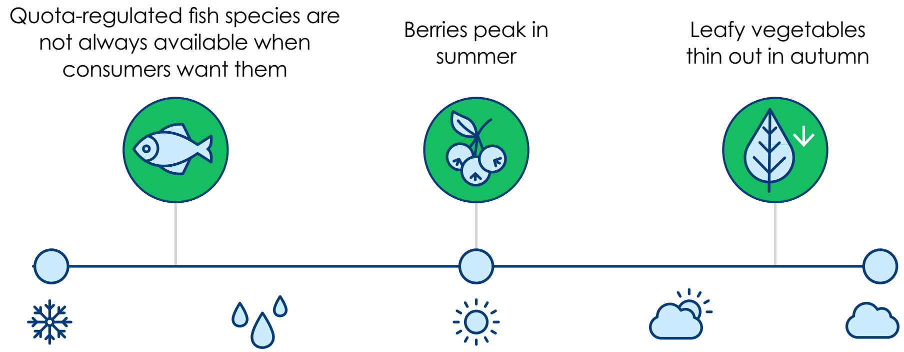
Fresh food follows the seasons. Frozen removes that limit. One of frozen food's most practical contributions to resilience is that it decouples availability from season. Fresh markets across Europe are governed by harvest windows.

This is not always visible to consumers. As the European Food Information Council's seasonality tool makes clear, the availability of fruit and vegetables varies significantly by country, month and climate region across Europe. Yet consumers have become used to a wide year-round choice, often without seeing the supply systems that make it possible.

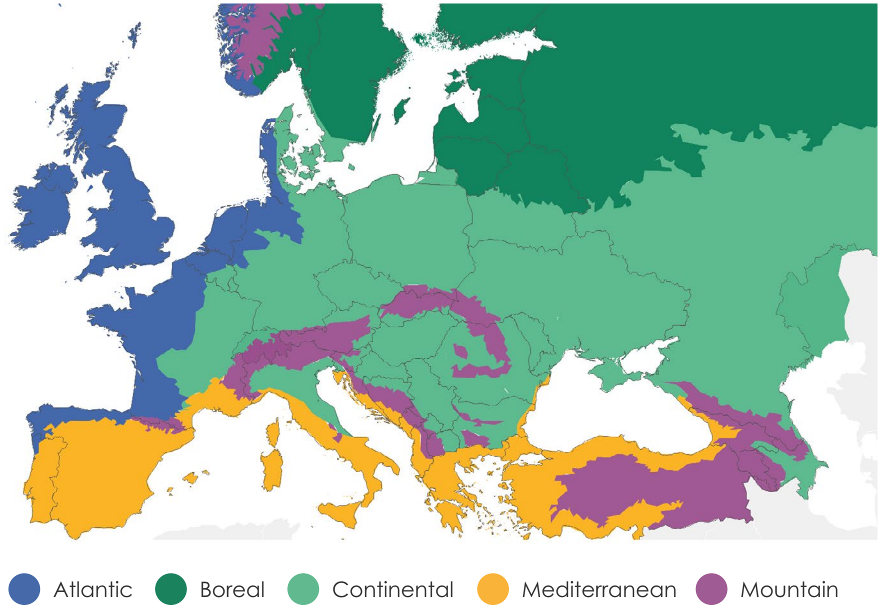
Over time, consumer expectations have also changed. European diets have become more diverse, with households increasingly incorporating a wider range of ingredients, cuisines and proteins into everyday meals. Frozen supply chains have played a quiet enabling role in this shift, making a broader set of foods reliably available beyond their natural season or geographic origin.

Freezing helps bridge that gap. By preserving food at its peak until needed, it allows products harvested or caught in season to remain available well beyond the point at which fresh supply would normally narrow. In effect, frozen food creates a form of year-round seasonality. Peas harvested in July can still be eaten in February. Frozen cod can be consumed year-round, independent of seasonal fluctuations in availability. Spinach and berries, which can be highly seasonal in fresh form, become more dependable staples.

This matters to consumers. **Over a third of European consumers (39%) already cite year-round access to seasonal ingredients as a reason for choosing frozen food.**[9] The scale of the frozen market reflects how embedded this function already is: frozen supply chains are not simply a supplement to seasonal fresh food, but a significant part of how year-round access to nutritious food is maintained across Europe.



EUFIC's seasonality map shows how fruit and vegetable availability varies across Europe by country, climate region and time of year - a reminder that year-round access to fresh produce is not guaranteed and depends on complex seasonal supply systems.



When the catch gets expensive

Fish is one of the foods most exposed to supply pressure and rising prices, making frozen access increasingly important.

Across Europe, seafood consumption depends heavily on international supply chains. In 2023, the EU's self-sufficiency rate for fishery and aquaculture products was just 38.1%. For some of the most widely consumed species - including salmon, Alaska pollock, shrimp and cod - the average EU self-sufficiency rate was only 4%.[9] This means European consumers are heavily exposed to changes in global supply, quotas, fuel costs, trade routes and demand from other markets.

That exposure is already visible in prices and consumption. EU consumer spending on fishery and aquaculture products reached €62.8 billion in 2024, a 4% increase year-on-year, while consumption volumes continued to fall. At-home consumption of fresh fish fell by 5% in 2024, continuing a downward trend across several of Europe's largest consuming markets.

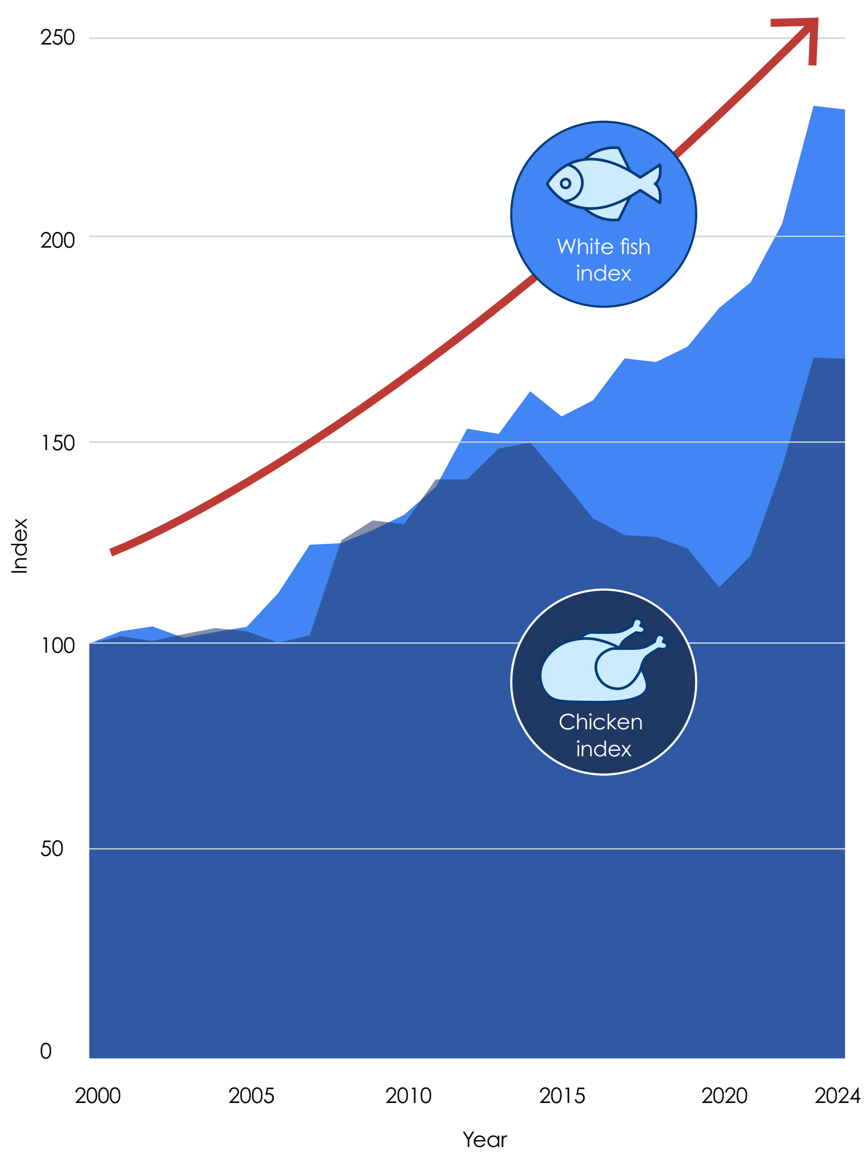
White fish shows the pressure particularly clearly. Cod remains one of Europe's most critical imported species, but supply has been constrained by quota reductions and lower availability, contributing to sustained high prices. UK retail price data provides a useful comparator for how this pressure can reach households. Over the past decade, white fish fillets rose at an annualised rate of 3.7%, more than double the rate for chicken at 1.6%. **Over twenty years, white fish prices rose by 138%, compared with 66% for chicken.[10]**

This is not simply another example of food inflation. It points to a deeper access challenge. Fish is one of Europe's most nutritionally important proteins, but if prices continue to rise faster and more unpredictably than other common proteins, lower and middle-income households may find it harder to keep fish in their diets.

The underlying reasons are structural. Wild-caught fish is governed by fixed quotas, finite ecosystems and limited sourcing regions. Unlike some other proteins, supply cannot simply be scaled up in response to demand. Globally, more than a third of marine fishery stocks are already outside biologically sustainable levels.[11] Regulation, certification and traceability requirements are also rightly becoming more stringent, but they add further complexity to an already constrained supply base.

In this context, frozen fish is not just a convenient format, but a fundamentally different way of preserving quality. Much of the global fish supply chain already relies on freezing at sea, with catch processed and frozen within hours. This rapid preservation helps maintain both freshness and nutritional value, providing a level of consistency that fresh supply chains cannot always guarantee. By extending shelf life, reducing waste and allowing supply to be managed over longer periods, frozen keeps nutritious seafood available in a market where fresh supply is increasingly exposed to volatility.

Chicken and Fish consumer price inflation



Call to action: Unlocking the full value of frozen food

Frozen food is already helping European households eat better, waste less and access food more reliably yet, it is still overlooked and undervalued by consumers and policymakers. To play its full role, frozen needs to be better understood, better signposted and better integrated into food policy.

What consumers need	How frozen helps	What is holding it back	What needs to change
Better nutrition	Makes vegetables, fish and balanced meals easier to access, portion and prepare within real family routines.	Frozen is still held back by the assumption that fresh is automatically healthier, while labelling does not always help consumers judge nutritional quality clearly.	Nutrition information should be consistent, clearer and focused on the quality of the produce.
Convenient access to good food	Gives households quick, reliable meal options when time is short, without defaulting to takeaway or lower-quality choices.	Convenience is too often treated as a compromise, rather than a legitimate part of how people access good food.	Food policy and public health debates should recognise convenience as part of access, especially for time-poor households.
Less waste, better value	Helps households keep food for longer, use more of what they buy, reduce waste and make budgets go further.	Food waste is still treated mainly as an environmental issue, when for households it is also a direct cost-of-living issue.	Frozen food should be recognised as a practical way to reduce wasted food and wasted money.
More varied diets, year-round	Extends access beyond harvest windows, making seasonal ingredients such as vegetables, berries and fish available throughout the year.	Food policy often prioritises fresh, local and seasonal supply without fully recognising how frozen supports year-round access.	Frozen food supply chains should be treated as part of reliable food access, not as secondary to fresh food systems.
Secure access to important proteins	Helps maintain access to fish and other proteins through longer storage, frozen-at-sea supply chains and family-friendly formats.	Fish supply is constrained by quotas, finite ecosystems, concentrated sourcing and tighter regulation, increasing pressure on price and availability.	Frozen fish should be built into food security planning as a critical route to nutritious, accessible protein.

Conclusion

Food is a fundamental human need, yet the conditions under which millions of European households access it are becoming more complex and more demanding. Sustained cost pressures, time-poor lifestyles, supply chain fragility and a growing volume of often contradictory nutritional guidance have made the pursuit of a nutritious, affordable and reliable diet increasingly difficult. These are not peripheral concerns. They are central to how Europe feeds itself today.

Frozen food is already helping to meet many of these challenges. But its role is not yet fully recognised. Consumer perception continues to lag behind the reality, with many households still defaulting to fresh as the benchmark for nutrition across most categories. In practice, this can lead to choices that are more costly, more wasteful and no more nutritious than available frozen alternatives. At a system level, the contribution of frozen food extends well beyond the individual household. Cold chain infrastructure provides a structural resilience that just-in-time fresh supply chains cannot always match. The ability to hold stock over longer periods, maintain year-round access to seasonal produce and absorb disruption before it reaches consumers is not a marginal benefit, it is a core part of how food systems remain reliable under pressure. As Europe's reliance on global supply chains increases, and as climate and environmental pressures continue to shape production, this stabilising role becomes even more important.

Frozen food is not a compromise. It is a practical, trusted and structurally important part of how Europe feeds itself. It supports better food choices, reduces waste, improves access and strengthens resilience across the system as a whole.

The opportunity now is not to reposition frozen food, but to better recognise it and reflect the role it already plays. Ensuring that this is understood by households, industry and policymakers alike, is both an economic and social priority.

Methodology:

Data collection conducted by Focaldata (accredited member of the British Polling Council). Samples of n=2,000 were collected in UK, France, Germany, Italy, and Sweden; and a sample of n=750 in Croatia. Samples were made nationally representative by Gender, Region, and Age. Fieldwork was conducted between 15 April 2026-27 April 2026

References:

1. Data collection was conducted by Focaldata, an accredited member of the British Polling Council. Nationally representative samples of n=2,000 were collected in the UK, France, Germany, Italy and Sweden, with a sample of n=750 collected in Croatia. Samples were made nationally representative by gender, region and age. Fieldwork was conducted between 15 and 27 April 2026.
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