

Building FOOD 2040

Stakeholder Input for the
new EU R&I Strategic Agenda
for Food Systems



Building Food 2040: Stakeholder Input for the new EU R&I Strategic Agenda for Food Systems

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Building FOOD 2040

Stakeholder Input for the new EU R&I Strategic Agenda for Food Systems

Analysis and synthesis of the results from
the open consultation survey

edited by
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1. Executive Summary

The Commission is developing a new strategic research & innovation agenda on food systems, Food 2040, to foster the development of competitive, sustainable and resilient food systems solutions benefiting citizens, the environment and climate. **An EU-wide survey was conducted, to which 631 stakeholders responded.** This report summarises the findings of the survey and presents a qualitative analysis of **63 supplementary written submissions** (position papers, policy briefs, roadmaps, and vision statements) provided by various stakeholders, industry associations, NGOs, and academic networks. It also provides an overview of the respondent profile, summarises stakeholder views on future cross-cutting R&I priorities, analyses suggestions for updating the current pathways, and **identifies broader considerations for the conceptualisation of Food 2040.**

The quantitative survey and qualitative submissions confirm that **stakeholders highly value the systems-thinking approach introduced through Food 2030.** Food 2030 helped consolidate a more integrated understanding of food systems Research & Innovation (R&I) and supported collaboration across disciplines, sectors and policy areas. Building on this foundation, stakeholders emphasised that Food 2040 should further strengthen the links between R&I priorities, implementation pathways, measurable impacts, and the uptake of results in policy, practice, and the market.

The results underline the **need to bridge the "valley of death" between basic and conceptual research**, covering activities up to Technology Readiness Levels (TRL) 6, helping promising solutions progress towards deployment, commercialisation and wider uptake.

Respondents highlighted several key priorities, including:

- Greater integration of primary producers in post-farm-gate valorisation (processing, manufacturing, scale-up)
- Significant capital investments in technology and infrastructure deployment
- Faster EU regulatory procedures
- Prioritisation of EU strategic autonomy

The results also point to a **need to update and streamline the existing Food 2030 pathways.** Respondents called for better alignment with current food-system realities, clearer objectives and expected impacts, and stronger monitoring of progress. Open-ended responses and written submissions further emphasised:

- Circularity, environmental impacts
- Decentralised and short supply chains
- Protein diversification
- Resilience
- Strategic autonomy as areas deserving stronger visibility in the future agenda

2. Methodology and Dataset Overview

The findings in this report are drawn from a mixed-methods data collection effort conducted in March 2026. The analysis draws on three main sources:

- **Quantitative survey responses:** A structured survey yielding 631 valid responses from a wide array of European food system stakeholders, including an evaluation of past funding beneficiaries including SMEs.
- **Qualitative written submissions:** 63 supplementary documents, including position papers, policy briefs, roadmaps and vision statements, providing more detailed sector-specific perspectives. Out of these 63 submissions, 59 identified areas that could complement, expand or further specify the current Food 2030 pathways. This suggests that stakeholders broadly support building on the existing framework while updating it to reflect new priorities, emerging evidence and an evolved policy context.
- **Open-ended survey responses:** Algorithmic analysis combined with qualitative interpretation of textual survey answers to extract dominant operational suggestions.

3. Results

3.1. Respondent Demographics and Stakeholder Coverage

The distribution of the 631 survey respondents provides useful context for interpreting the findings. The responses show **strong mobilisation from the scientific and academic communities**, confirming the continued engagement of the R&I community around the Food 2030 systems approach. At the same time, some downstream food-system actors were less represented, which points to an opportunity to complement the evidence base through continued engagement with manufacturers, processors, retailers, logistics operators and consumer-facing organisations.

3.1.1. Demographic Insights

Respondents were grouped according to the type of organisation or stakeholder category they represented (**Figure 1**):

- **Research institutes and academia represent over half of all respondents (51.5%).** This demonstrates strong engagement from the scientific community and confirms the capacity of the current R&I framework to mobilise research and academic actors around a food-systems agenda. As Food 2040 moves towards implementation and uptake, this strong research base could be complemented by deeper engagement with industry practitioners and other actors involved in deployment, scale-up and consumer-facing activities.
- **Individual citizens are the second-largest respondent group (9.4%),** highlighting strong public interest in future food systems. This points to a growing consumer awareness of climate change and health. However, there is a contrast between unorganised citizen engagement and formal representation, as consumer or advocacy groups make up only 1.7% of respondents.

- **Agriculture and farming represent 8.4% of respondents**, which ensures the voice of primary producers is present. This group is followed closely by government and policy actors (7.8%) and NGOs (7.6%).
- **Food manufacturing and processing (food industrials) account for 6.7% of respondents**, while retailers, distributors and logistics operators represent 0.3% of respondents. This suggests that future consultation and implementation activities could further strengthen engagement with actors involved in processing, manufacturing, logistics, retail and other post-farm-gate activities. Their involvement will be important to support the practical relevance, scalability and uptake of future R&I actions.

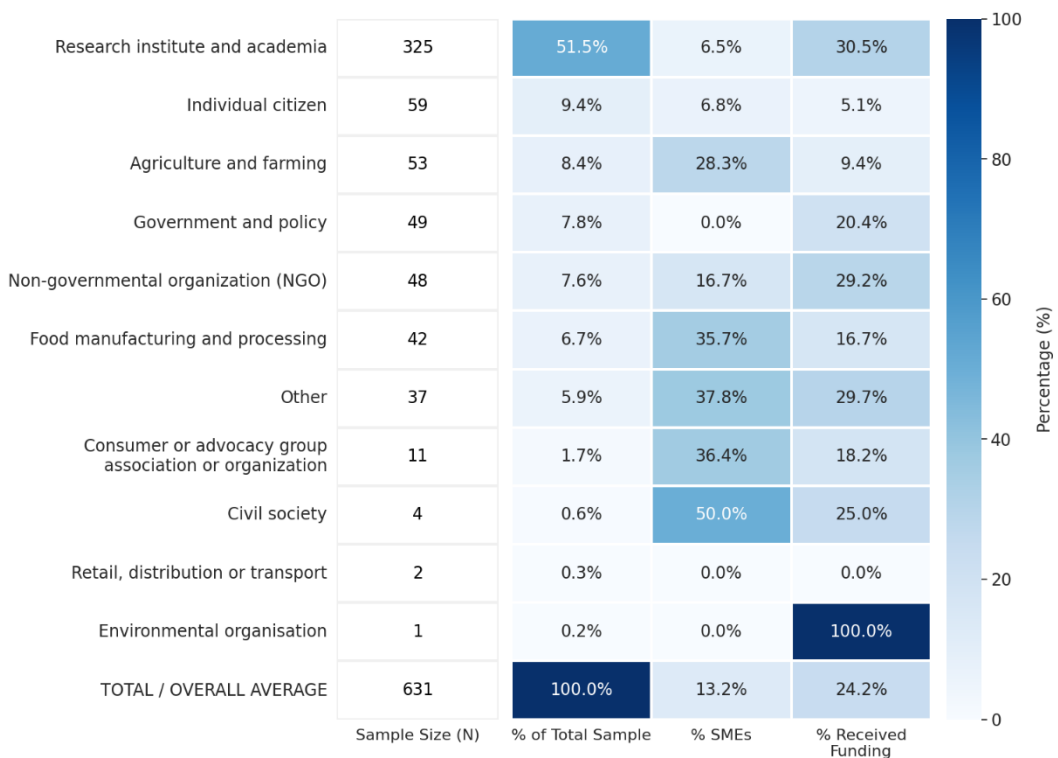


Figure 1. Statistics of the survey respondents.

3.1.2. Geographic coverage

Most answers were received from Spain and Germany, while when adjusted for countries' population size, Belgium, Ireland, Finland and Denmark showed the highest levels of engagement (**Figure 2**).

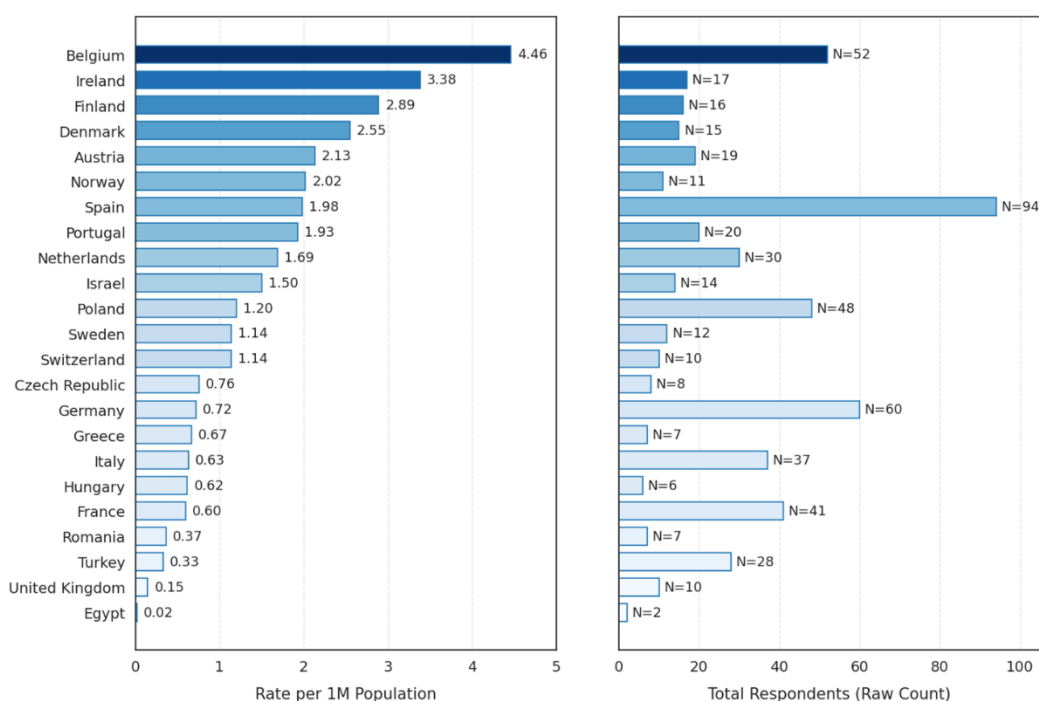


Figure 2. Geographic spread of the survey respondents.

Insight for policy integration

The survey results reflect strong mobilisation from the scientific and academic communities, which is an important asset for the future agenda. Building on this research base, future consultation and implementation processes could further broaden engagement with downstream food-system actors, including food manufacturers, processors, retailers, logistics operators and consumer-facing organisations. This would help ensure that Food 2040 combines scientific excellence with practical relevance, scalability and market uptake.

3.2. Building on Food 2030: Stakeholder Input for the Next Generation of Pathways

Respondents across most categories recognised the added value of the Food 2030 framework, particularly its systems approach and its contribution to **more integrated and multi-actor ways of conceptualising research and innovation**. This confirms the continued relevance of the Food 2030 logic as a foundation for the future agenda (**Figure 3**). At the same time, more than a third of respondents reported not being familiar enough with Food 2030 to evaluate its impact, suggesting that **Food 2040 should incorporate stronger communication, visibility and stakeholder engagement activities**, to ensure broader awareness and participation (**Figure 4**).

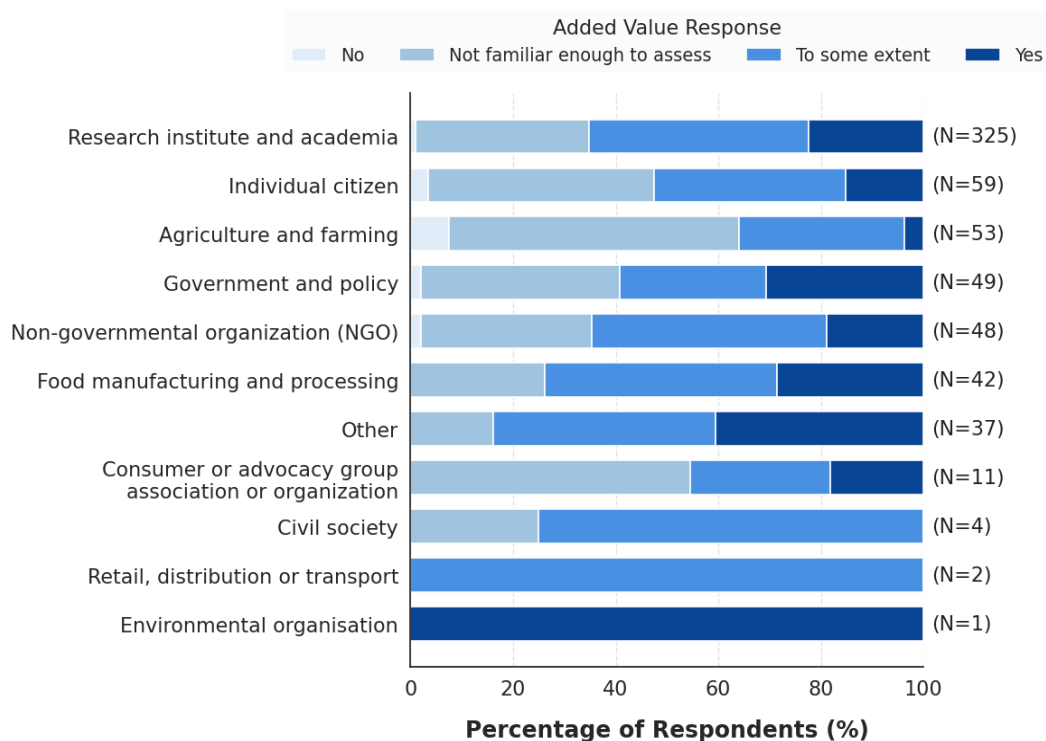


Figure 3. “Did Food 2030 provide added value?”

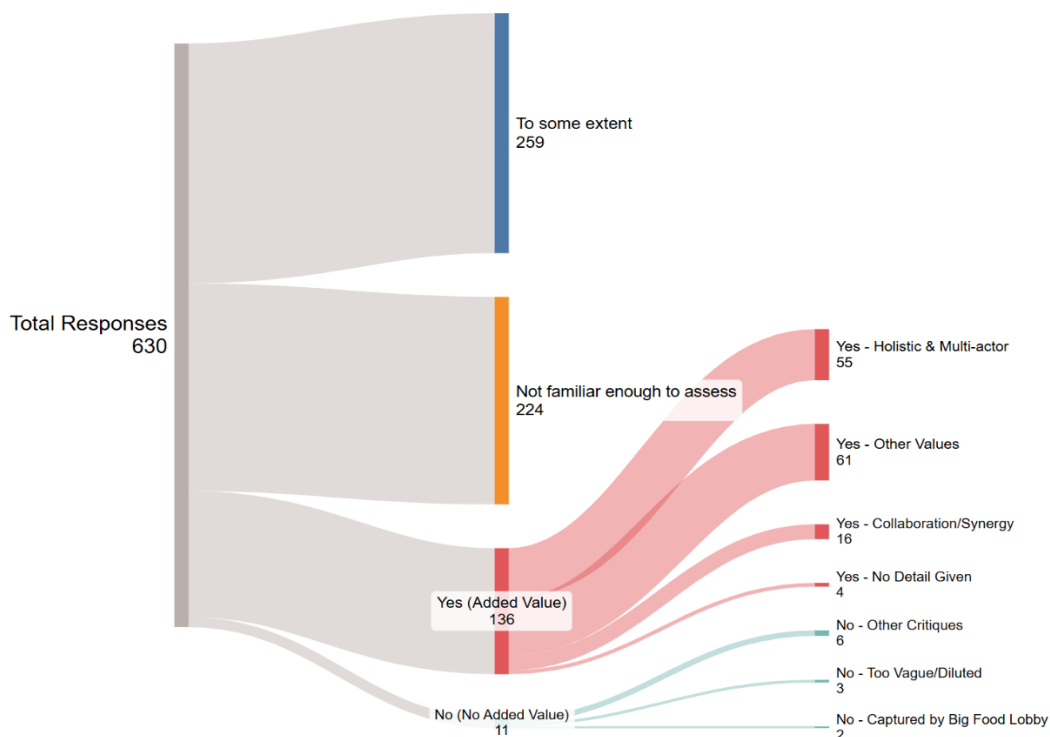


Figure 4. “Did Food 2030 provide added value?” - breakdown of the respondents’ answers.

When asked **how the current 11 Food 2030 pathways could be further developed**, respondents highlighted three main orientations: stronger alignment with today's food-system context, more explicit links between objectives and expected impacts, and simplification or consolidation of the pathways (**Figure 5**).

- **Stronger alignment with sector realities (59.4%)**: The most frequently selected area for improvement was better alignment with real-world food systems. This suggests that respondents see value in updating the pathways to reflect evolving geopolitical, economic, market, environmental contexts, and supply-chain developments. Food 2040 could therefore build on the Food 2030 systems approach while making its relevance to today's policy and innovation landscape more explicit.
- **Clearer objectives and impacts (38.7%)**: Respondents also supported making objectives, expected impacts and implementation links more explicit in the next phase. This points to the value of further strengthening the connection between R&I funding, implementation, uptake, technology transfer, and measurable progress.
- **Consolidation (30.9%)**: Nearly one-third of respondents supported simplifying, streamlining, and potentially merging some of the 11 pathways. This suggests that some stakeholders would welcome a more streamlined structure that preserves the breadth of the Food 2030 systems approach while making the future pathways easier to communicate, implement and monitor.
- **Enhanced monitoring and tracking**: A recurring theme in the open responses was the need for stronger monitoring and progress tracking. Respondents suggested that future priorities could be accompanied by indicators or milestones that help capture not only scientific outputs, but also progress towards implementation, scaling, policy uptake, and practical use.

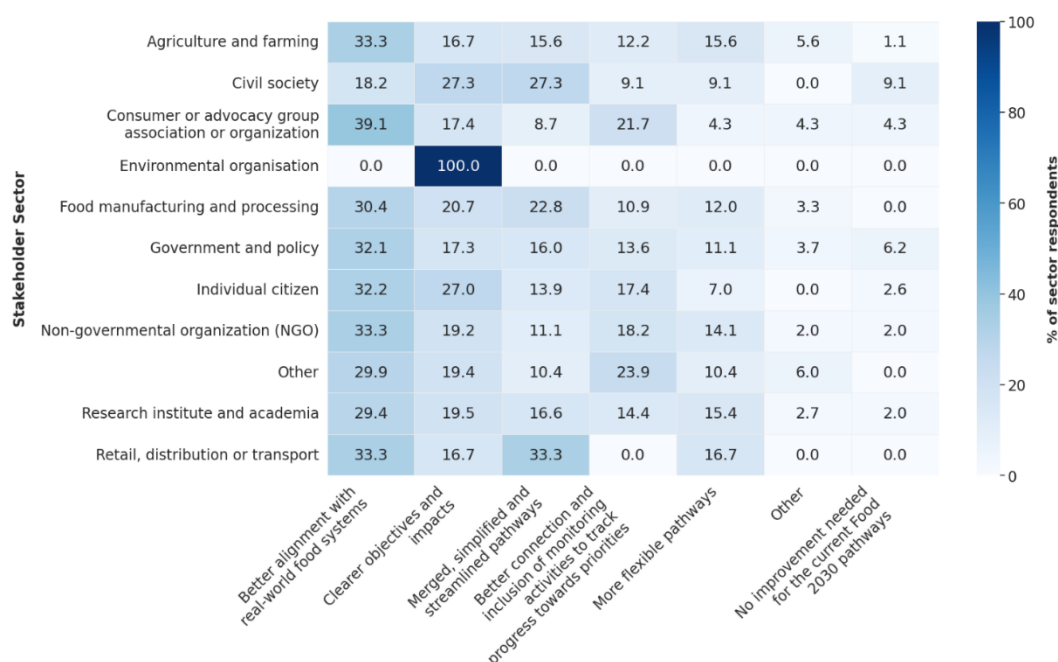


Figure 5. "How could the current 11 pathways be further improved?" - the responses are organised from left to right by decreasing importance and consensus.

Insight for policy integration

The findings suggest that Food 2040 could build on the objectives and systems logic of Food 2030 by presenting a renewed and more operational set of strategic pathways. Where appropriate, these pathways could be supported by more explicit expected impacts, indicators and monitoring mechanisms, helping to strengthen coherence, learning and the uptake of R&I results in policy, practice, and the market.

3.3. Top R&I Priorities for Food 2040

The quantitative data highlights a set of **priorities that are highly relevant for the next phase of the strategic framework**, covering the broader supply chain, public health, environmental sustainability, and geopolitical resilience (**Figure 6**).

- **Environmental impact (46.4%)**: The highest-ranked priority is "*Reduced environmental and climate impacts of food systems actors beyond farm gate*." This shows that environmental and climate impacts across the food system remain a central concern for stakeholders, including in relation to processing, packaging, transport, retail, consumption, and food waste reduction.
- **Health and dietary habits (44.7%)**: "*Improved human health through healthier dietary habits*" ranks second. This is reflected in the qualitative submissions calling for greater strategic attention to protein diversification, including plant-based proteins and other alternatives to animal-based sources. This suggests a need for R&I to support healthier, more sustainable, and more accessible dietary patterns.
- **Resilience and strategic autonomy (44.1%)**: "*Increased resilience and preparedness of food systems, including strategic autonomy and crisis situations*" is the third highest ranked priority. In the context of recent geopolitical crises and supply-chain disruptions, respondents highlighted the importance of strengthening resilience in critical areas. Qualitative evidence points, for example, to the importance of scaling up domestic aquaculture and plant-based protein production, while reducing critical import dependencies for feed and food inputs, including additives, ingredients and micronutrients.
- **Increased uptake of nature-based solutions and agroecological practices (32.2%)**: This priority reflects recognition that technological innovation should be complemented by nature-based and agroecological approaches to restore soil health, protect biodiversity and strengthen ecosystem resilience.
- **Behavioural change and citizen empowerment towards accessible and affordable, healthy and sustainable diets (29.6%)**: Respondents also highlighted the importance of enabling citizens to adopt healthier and more sustainable diets. This includes ensuring that food-system transitions remain socially fair and do not place disproportionate burdens on vulnerable groups or farming communities.

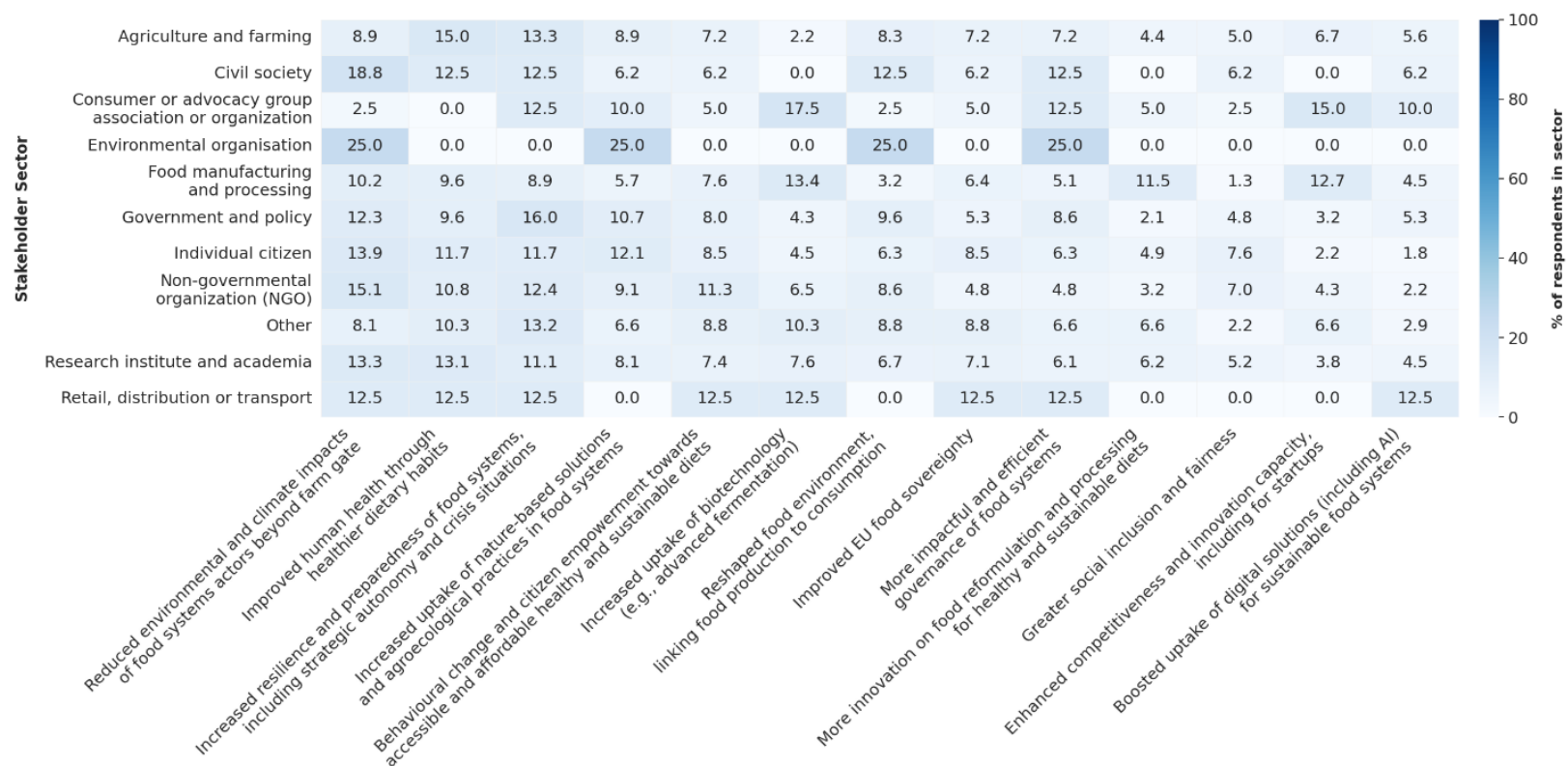


Figure 6. “What are the top priorities for Food 2040?” - the answers are organised from left to right in decreasing importance and consensus

3.3.1. Emerging Priorities from Open-ended Responses

To understand the broader landscape of future needs, the survey first asked stakeholders to identify the **biggest potential or areas of improvement for R&I in food systems** (Figure 7).

Across stakeholder sectors, **the most prominent thematic focuses were Market & Scaling, Climate & Sustainability, and Tech & Biotech, with Social & Communities also emerging strongly**. This suggests that respondents see significant potential for R&I not only in generating new knowledge, but also in supporting the practical deployment and scaling of food-system innovation, addressing environmental and climate challenges, and advancing technological and biotechnological solutions. At the same time, the strong presence of social and community-related themes indicates that stakeholders also recognise the importance of behavioural, social, and place-based dimensions in food systems transformation.

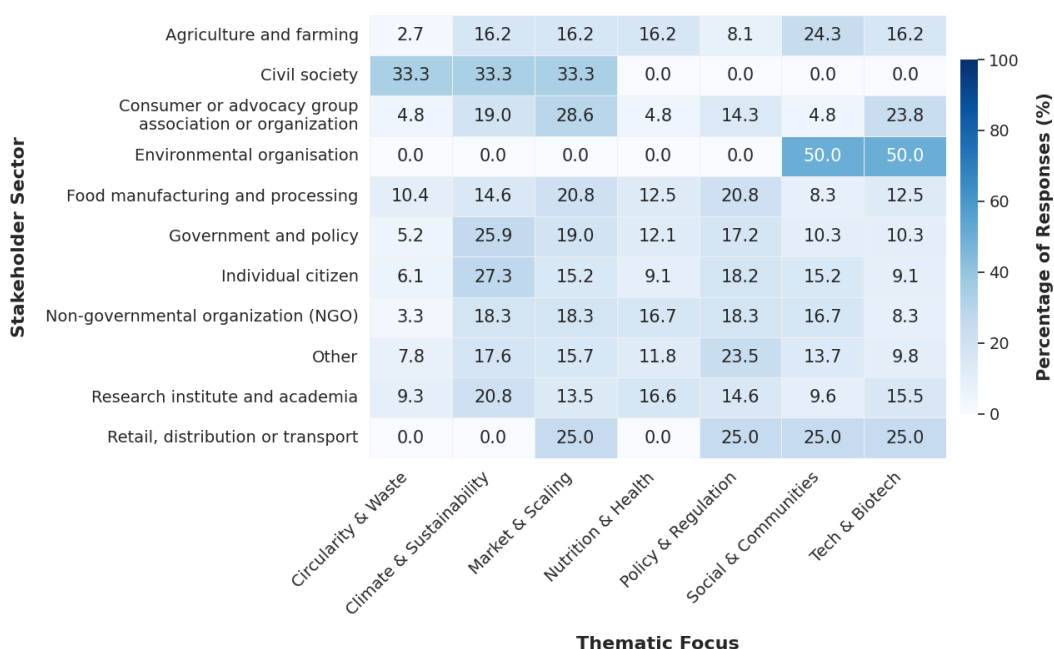


Figure 7. “Where do you see the biggest potential or area of improvement for R&I in food systems?” - the answers are organised from left to right in decreasing importance and consensus

Building on these broad areas of potential, a deeper analysis explored the **open-ended responses on additional priorities that could guide Food 2040** (Figure 8). This analysis highlighted three recurring themes:

- **Protein diversification and plant-based transitions:** Respondents called for clearer and more updated R&I terminology around nutrition and sustainable diets, with greater attention to protein diversification and the scale-up of plant-based protein production.

- Circular economy and value-chain circularity:** Respondents highlighted the importance of food waste valorisation, resource efficiency, and circularity across the value chain. These themes were not only seen as cross-cutting issues, but also as areas that may require more visible and dedicated attention within the future R&I framework.
- Strategic autonomy and local food-system resilience:** Respondents emphasised that EU strategic autonomy should be reinforced through support for regional short supply chains, decentralised infrastructure, and local food systems.

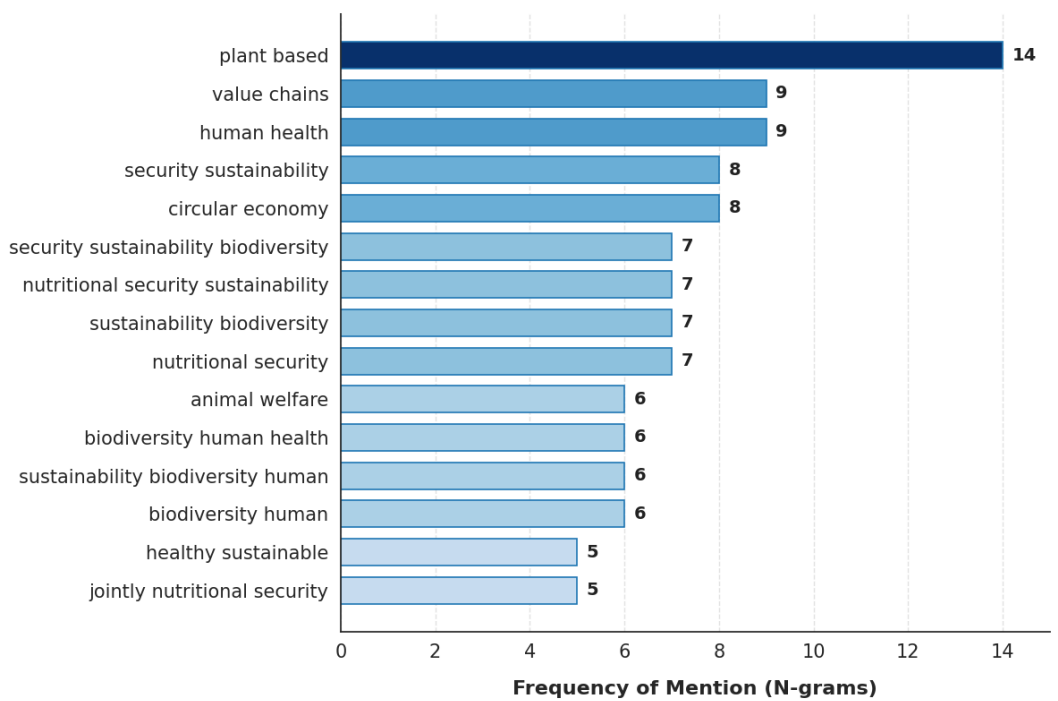


Figure 8. “Which top priorities, not mentioned previously [cf. Figure 6], should guide Food 2040?” N-gram analysis of the open-ended answers.

3.3.2. Strategic Autonomy, Competitiveness, and the Scale-up of Food System Innovation

The qualitative submissions highlight the importance of supporting the full innovation pathway, from early-stage and systems-based research to demonstration, deployment and uptake. Food 2030 has helped strengthen integrated and conceptual approaches to food-systems R&I. Building on this basis, respondents emphasised that **Food 2040 could give greater visibility to demonstration, scale-up, deployment and market uptake**, helping to bridge the well-known “valley of death” between promising research results and their practical application at scale.

Several submissions echoed broader concerns, also highlighted in the Draghi report¹, about Europe's difficulties in **translating research excellence into scalable innovation and market deployment**. In the food-system context, this was raised in relation to innovative food ingredients, novel production methods, sustainable proteins and other technologies, where predictable regulatory pathways, access to capital and adequate industrial infrastructure were identified as important enabling conditions for uptake.

A recurring theme was the importance of strengthening **financing and infrastructure for downstream processing and manufacturing**. Several respondents suggested that Food 2040 could better connect R&I funding with pilot plants, demonstration facilities, bio-manufacturing capacity, circular waste valorisation infrastructure, and public-private shared facilities.

Respondents also suggested that Food 2040 should provide **targeted R&I support to sectors where Europe faces critical dependencies or resilience challenges**. Examples include domestic aquaculture and enhanced processing capacities for plant-based proteins, both of which were identified as relevant for food security, strategic autonomy, and economic competitiveness.

4. Conclusion

The evidence gathered through the 631 survey responses and 63 supporting documents confirms strong stakeholder interest in the future of EU food-systems R&I. Respondents **value the systems approach introduced under Food 2030 and recognise its contribution to more integrated, multi-actor and cross-sectoral thinking**. At the same time, the findings point to an opportunity for Food 2040 to build on this foundation and further adapt it to an evolved policy, market, environmental and geopolitical context.

Three messages stand out. First, Food 2040 could further strengthen the full food system by **deepening engagement with post-farm-gate actors**, including food manufacturers and processors, logistics, retail, and waste-management actors. Second, the future framework could present a **renewed and more operational set of pathways, preserving the breadth of the Food 2030 systems approach** while making priorities, expected impacts, and monitoring arrangements more explicit. Third, **Food 2040 could support the translation of research excellence into deployment and uptake** by strengthening links with pilot and demonstration infrastructure, access to finance, strategic investment, and predictable regulatory pathways.

Overall, the findings suggest that **Food 2040 should build on the achievements of Food 2030 while reinforcing the connections between food science, innovation, industry, public policy, and citizens**. This would strengthen Europe's capacity to deploy food-systems innovation at scale and support competitive, resilient, healthy and sustainable food systems.

¹Draghi, M. (2024). *The Future of European Competitiveness: A Competitiveness Strategy for Europe*. European Commission. Retrieved from https://commission.europa.eu/topics/competitiveness/draghi-report_en#paragraph_47059

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The report summarises input from 631 survey respondents and 63 written submissions to inform Food 2040, the new EU Strategic R&I Agenda for Food Systems. Stakeholders value the systems-thinking approach introduced by Food 2030 and see Food 2040 as an opportunity to build on it by strengthening implementation, impact, deployment and uptake. Key priorities include environmental impact, healthier diets, resilience, strategic autonomy, circularity, protein diversification, short supply chains and the scale-up of food-system innovation.

Studies and reports

