Prepared for USMEF

Gene-Edited Pork Perceptions Study

Final Report

FTI CONSULTING™

November 2025

Executive Summary

FTI CONSULTING

Table of Contents

4	Methodology
8	Awareness & Understanding
14	Attitudes & Perceptions
24	Purchase Intent
32	Appendix

Methodology

Fielding Approach

Recruitment and fieldwork was conducted online.

The survey was fielded from October 28th to November 11th, 2025.

Extensive quality checks were completed during fielding (e.g., inconsistencies, bot response screening, etc.).

Sample Details

N=4,065 adult respondents were surveyed: N=1,017 in Mexico; N=1,000 in Colombia; N=1,030 in Canada; and N=1,018 in Japan.

The sample approach controlled for gender, age, household income, and region to ensure representative sample in all four countries, based on national census data and other authoritative sources.

Screening Criteria

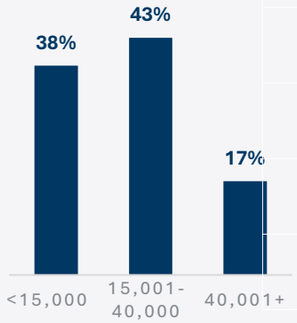
Respondents are responsible (fully or shared) for their household's grocery shopping and had purchased pork within the past 12 months.

Majorities of respondents consume pork on a regular basis (weekly or more frequently).

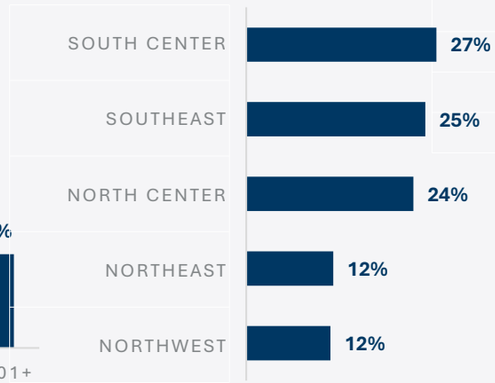
Demographics

MEXICO

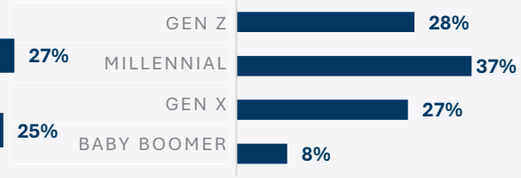
INCOME



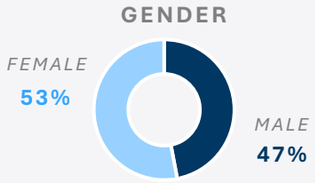
REGION



GENERATION

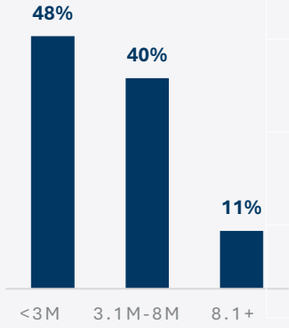


GENDER

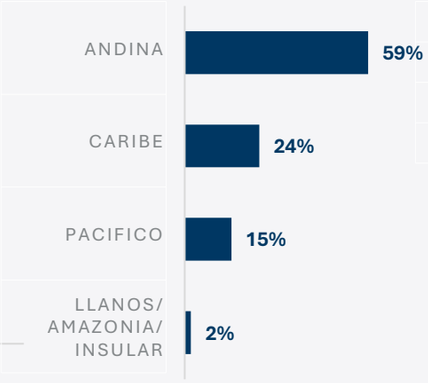


COLOMBIA

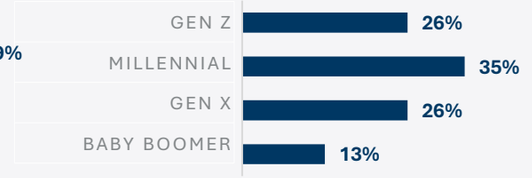
INCOME



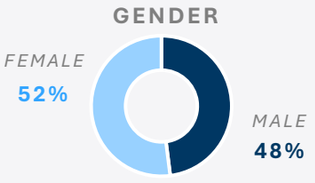
REGION



GENERATION

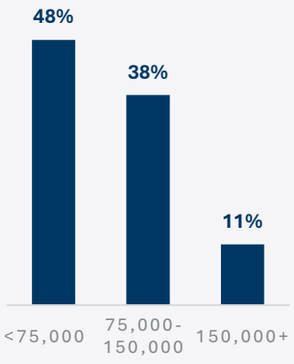


GENDER

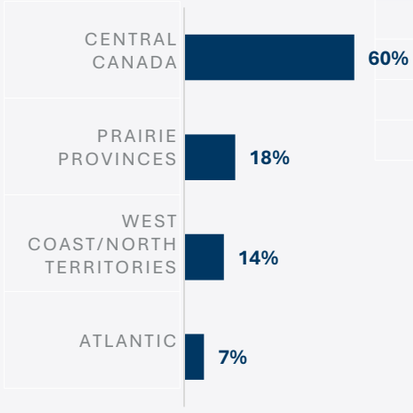


CANADA

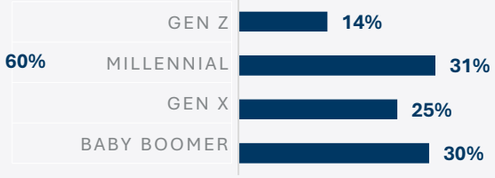
INCOME



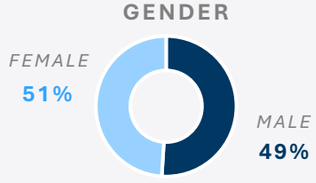
REGION



GENERATION

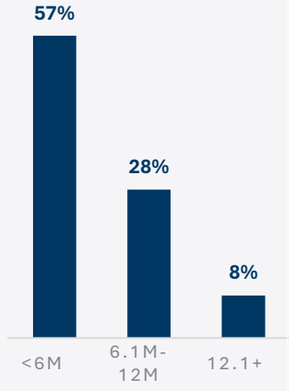


GENDER

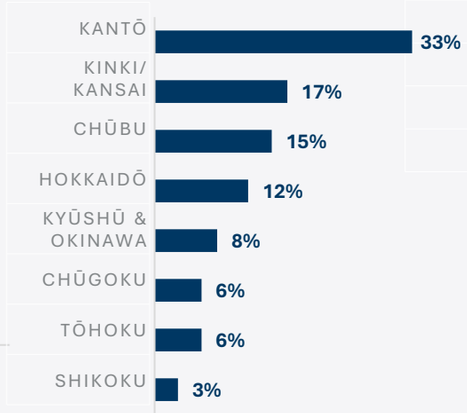


JAPAN

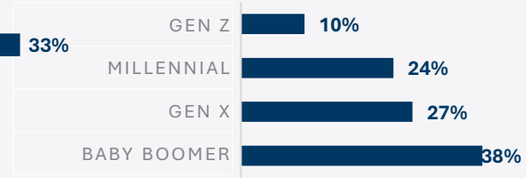
INCOME



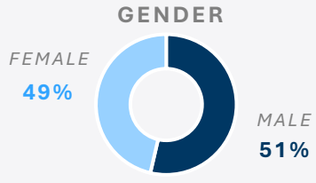
REGION



GENERATION



GENDER



Executive Summary

Consumers are curious about new food technologies, but not yet convinced

- Openness to food innovation is highest in Mexico and Colombia, but in Canada and Japan skepticism is more dominant.
- However, across countries, there is a sizeable “ambivalent middle”, whether measured in openness, support, or intent.
- This ambivalence suggests that consumers are willing to assess on a case-by-case basis, guided primarily by perceived health, nutritional safety, and trust that the product is produced responsibly and backed by rigorous testing.

Low awareness and limited understanding are current barriers to support

- Familiarity with gene editing in food is minimal across countries; many haven’t heard of it at all.
- Support modestly exceeds awareness, suggesting that some are open in principle, even if they don’t yet know much about what gene editing involves.
- Once definitions are provided, Latin American consumers respond more positively, while Canadian and Japanese reactions are more subdued, indicating knowledge alone won’t overcome skepticism in more cautious markets.

Concerns are clearer and more personal than perceived benefits

- No single benefit clearly defines gene-edited pork, with views relatively diffuse and uncertain.
- When it comes to concerns, health and long-term safety stand out, cited by nearly half of consumers. These worries feel immediate and personal, tied to day-to-day health and well-being.
- Even with lower prices or trial opportunities, purchase intent remains low, pointing to the fact that the obstacle for many consumers is not cost but trust in how the product is made.

Transparency and labeling are essential to building trust

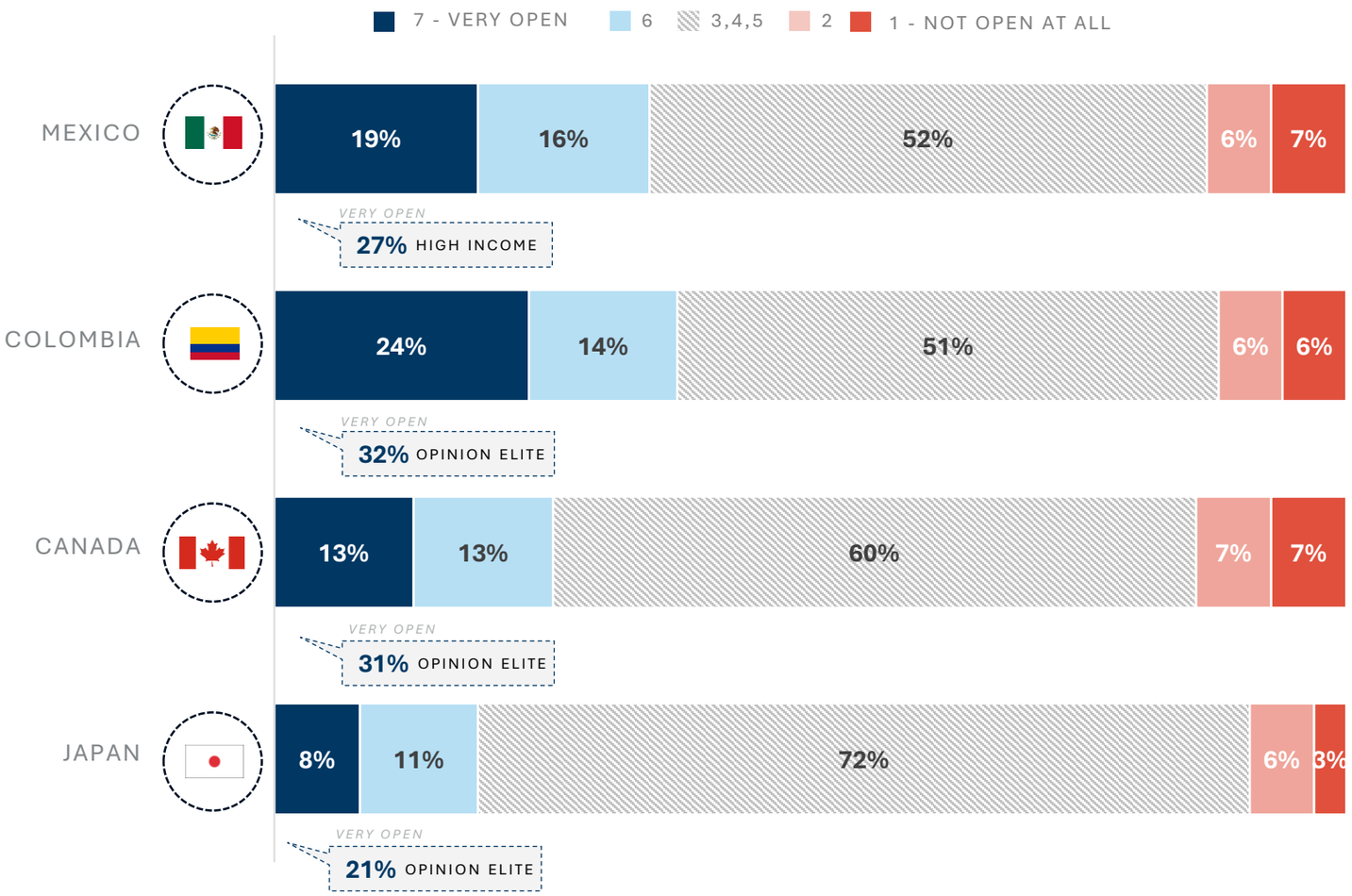
- Majorities across countries see clear labeling of gene-edited pork as very important.
- In Canada and Japan, consumers mainly want the fact of gene editing clearly stated.
- In Mexico and Colombia, there’s stronger demand for more detail on labeling (e.g., government approval seals, nutritional details).
- Labeling serves to signal honesty and trustworthiness on a topic unfamiliar to many consumers and will be foundational for any future communication strategy.

Awareness & Understanding

Consumers show mixed openness to foods made with new technologies

Interest varies by country – higher in Mexico and Colombia, lower in Canada and Japan – while most remain ambivalent and focused on health and safety. Unprompted, virtually no consumers think of gene editing as a food-relevant technology.

OPENNESS TO BUYING FOODS PRODUCED WITH NEW TECHNOLOGIES



TOP ASSOCIATIONS WITH FOOD TECHNOLOGY

LESS THAN 1% OF RESPONSES MENTIONED GENE-EDITING

FOOD PRESERVATION AND PROCESSING TECHNOLOGIES

"Pain-free animal-slaughter procedures and highly certified processing facilities."*

"Optimizing processes – perhaps by implementing artificial intelligence or by shortening turnaround times."*

~25%

CONCERNS ABOUT HEALTH, SAFETY, AND NATURALNESS

"Too much processing and genetic manipulation is unsafe."

"I don't think it is healthy and might even make us sick."*

"I'm concerned about drugs or additives that promote unnatural growth."*

~15%

ALTERNATIVE MEATS AND LAB-GROWN FOOD

"Either lean, toxin-free meat or protein-rich synthetic (lab-grown/plant-based) meat."*

"Alternative proteins, lab-grown (cultivated) meat, precision agriculture."*

~14%

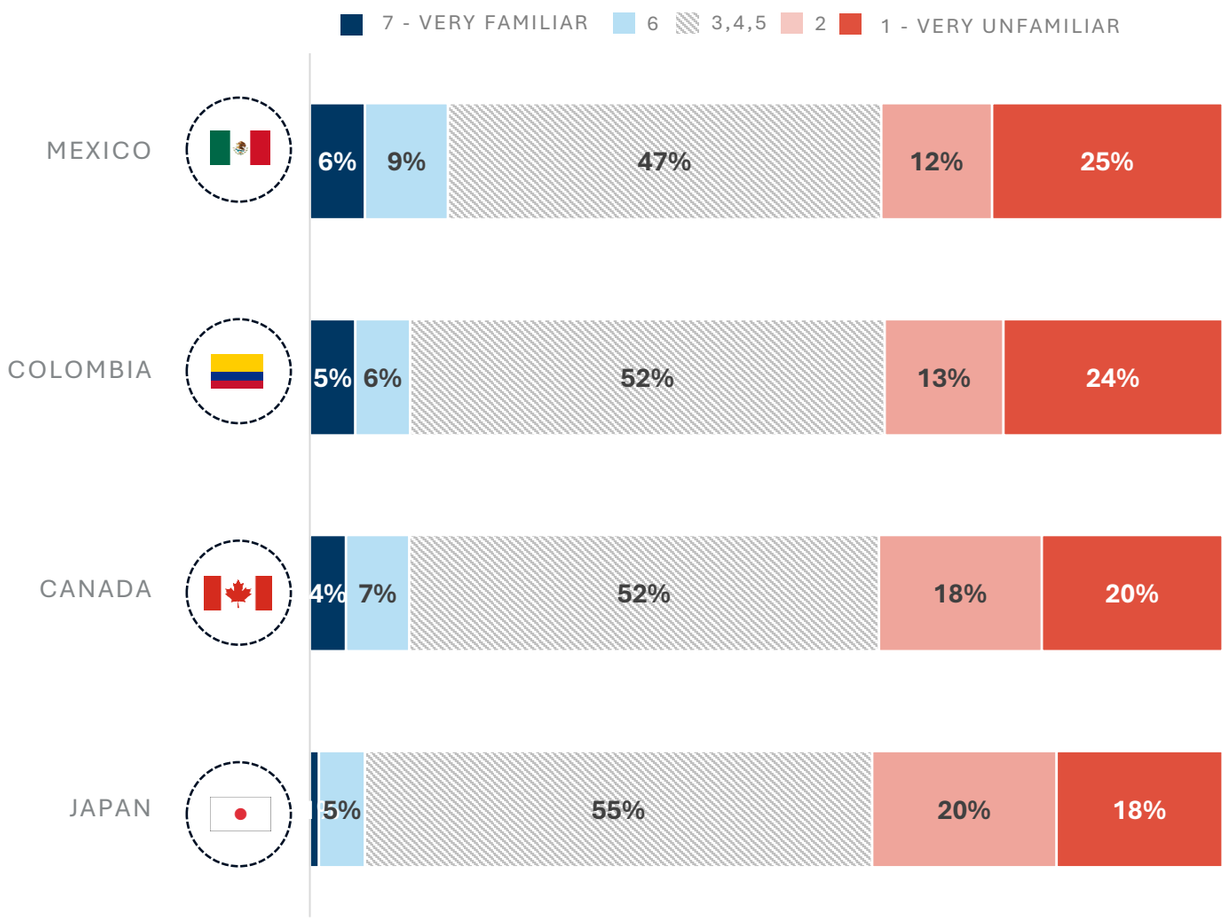
**TRANSLATED FROM A LANGUAGE OTHER THAN ENGLISH*

Q: When you think about new technologies in food or meat production, what comes to mind? N=4,065
Q: In general, how open are you to purchasing foods produced with new technologies? N=4,065

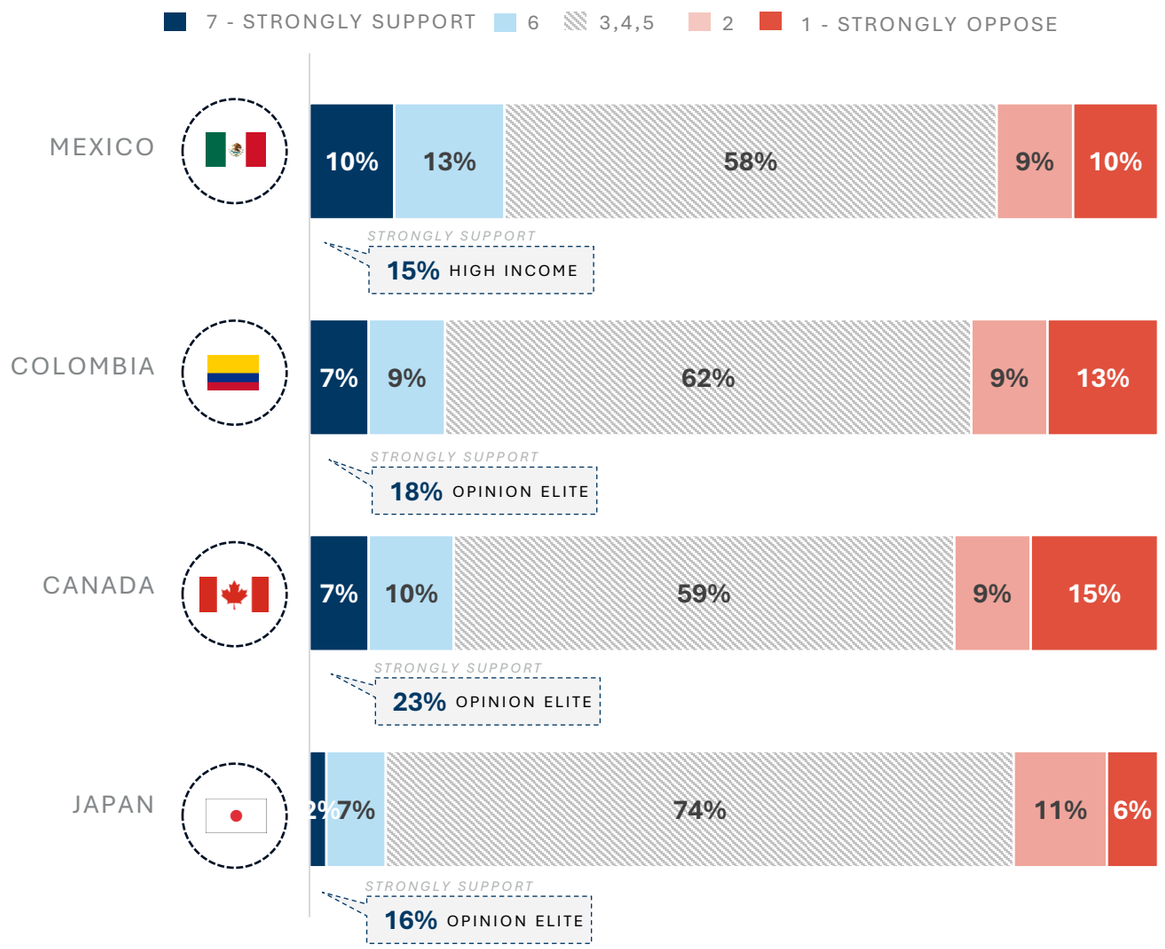
Low familiarity and uncertain views define early perceptions of gene editing

True familiarity is mostly in the single digits, indicating significant room for education. In terms of support, the majority across all markets fall into a neutral middle ground, potentially open to the technology but unconvinced.

FAMILIARITY WITH GENE EDITING TECHNOLOGY



SUPPORT OF GENE EDITING

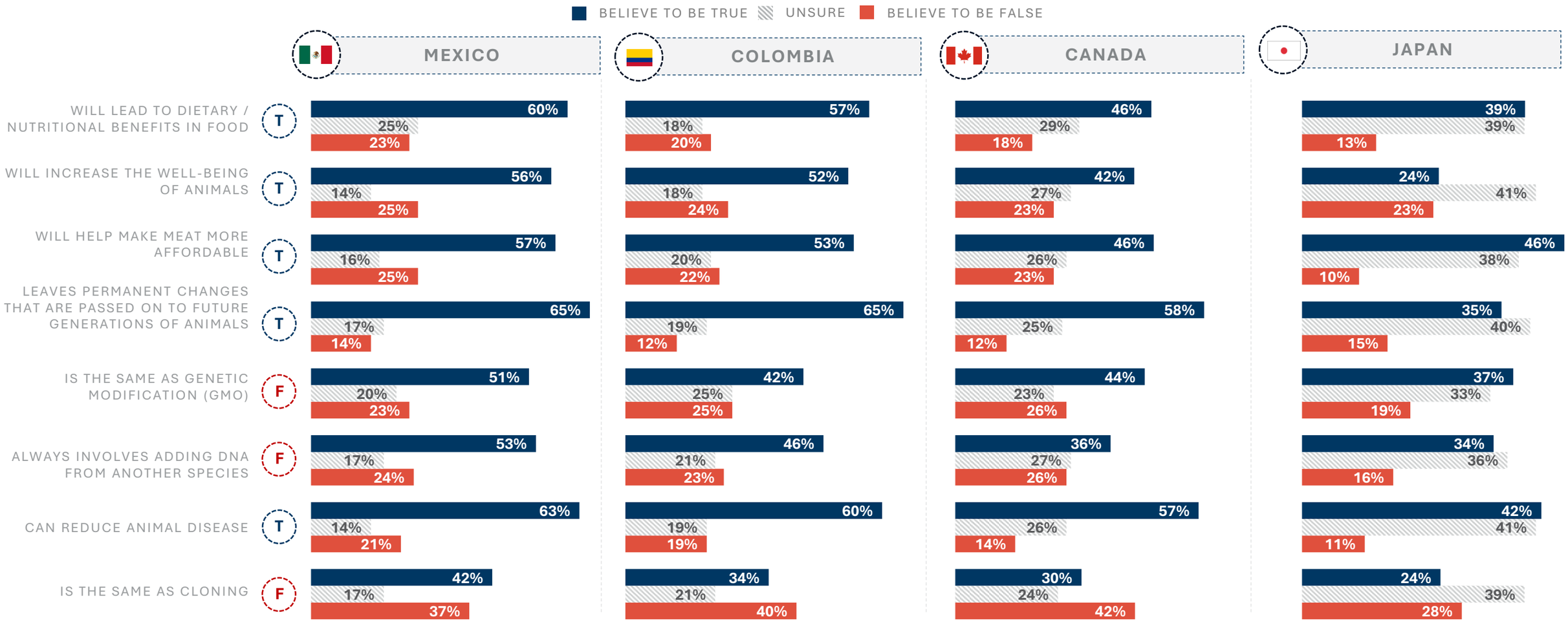


Q: How familiar are you with gene editing technology in food production? N=4,065
Q: To what extent do you support or oppose the use of gene editing in food production in general? N=4,065

Consumers show some ability to separate fact from fiction on gene editing

Across countries, fewer believe false statements about gene editing. Nonetheless, knowledge of gene-editing is clearly limited across countries, with significant fractions of the population believing false statements, and misconceptions are widespread across segments.

COMMON BELIEFS ABOUT GENE EDITING



Q: Please indicate whether each of the following statements about gene editing in foods is true or false. Please answer based on what you know without looking up any information; if you are unsure, select “don’t know.” Please select one option for each.
N=4,065

But “gene-edited pork” most often sparks confusion around safety and science

Associations often blur the line between gene editing and genetic modification. While some recognize potential benefits like improved nutrition and disease resistance, uncertainty and misinformation dominate perceptions, underscoring the need for clearer education.

“GENE-EDITED PORK” ASSOCIATIONS

GENETIC MODIFICATION/MANIPULATION

(31%)

*“That its **DNA was altered** in some way to manipulate its genetics.”*

*“Their DNA is changed to make them **more resistant** to diseases or to produce more meat.”*

MEXICO	COLOMBIA	CANADA	JAPAN
41%	41%	32%	9%

POTENTIAL BENEFITS

(21%)

*“Technology designed to **improve food quality and safety**, making animals more resistant to diseases, helping them grow more efficiently, and producing meat with **better nutritional value**.”*

*“Producing an animal that will be **healthier**, producing **better meat**.”*

MEXICO	COLOMBIA	CANADA	JAPAN
23%	26%	22%	15%

SAFETY CONCERNS/DISTRUST

(16%)

*“That it’s **unhealthy**, and the way it’s produced could cause negative impacts whoever consumes it.”*

*“Something unhealthy to eat because its composition is modified for consumption, and chemicals are often added, making it **harmful to humans**.”*

MEXICO	COLOMBIA	CANADA	JAPAN
16%	11%	15%	21%

ARTIFICIAL/LAB-GROWN MEAT

(14%)

*“Lab modified animals...it’s like Frankenpork and **not what nature intended**.”*

*“Meats created or modified in a lab using **genetic engineering** to improve quality, flavor, or production.”*

MEXICO	COLOMBIA	CANADA	JAPAN
17%	19%	11%	7%

UNCERTAINTY/LACK OF KNOWLEDGE

(21%)

*“I’ve heard of the term, but I don’t have an understanding of **what it actually is**.”*

*“I think it combines aspects of **biotechnology, ethics, health, and economics**, but I don’t know enough about it.”*

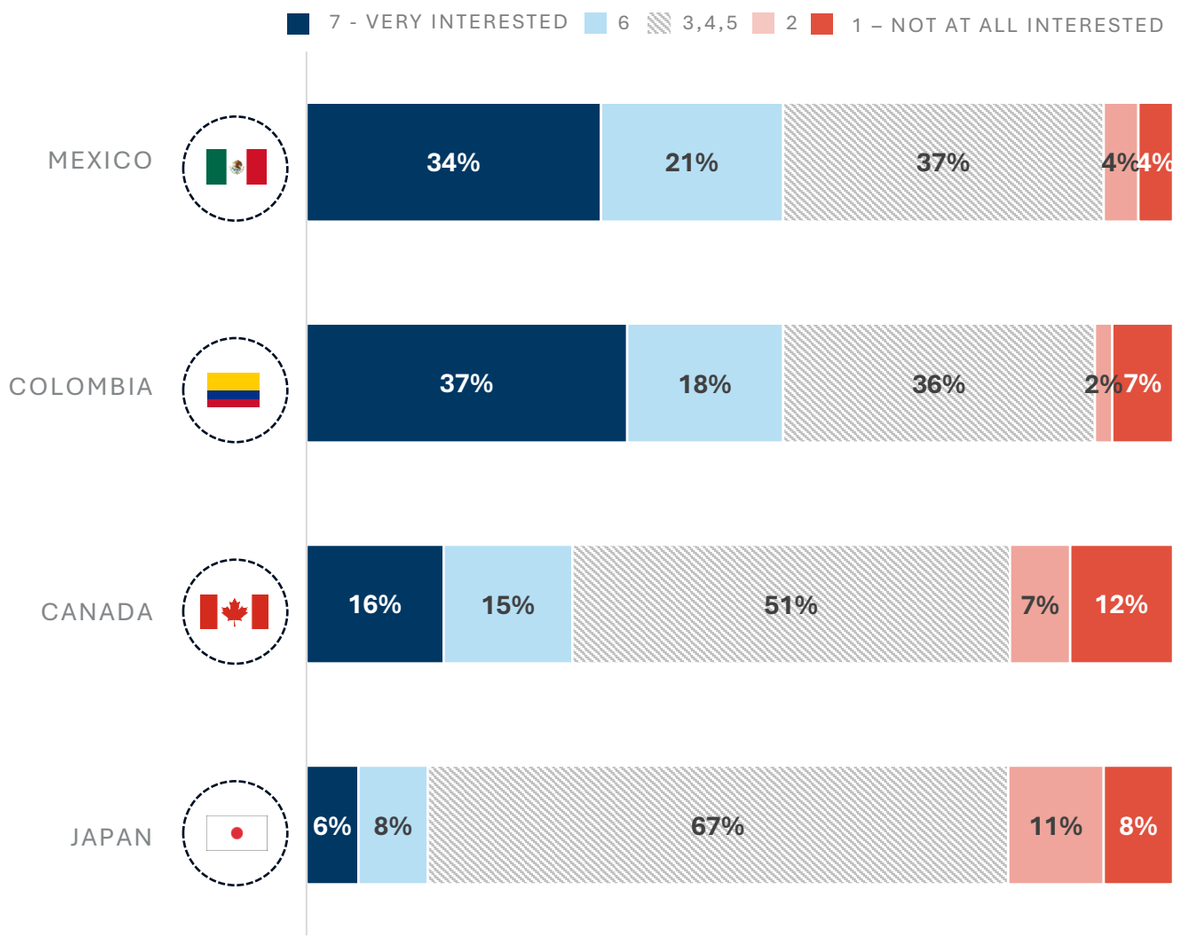
MEXICO	COLOMBIA	CANADA	JAPAN
4%	5%	24%	50%

Q: What comes to mind when you hear “gene-edited pork”? Please be as detailed and specific as possible. N=4,065

Interest in learning more is moderate overall but strongest in Latin America

About half of respondents in Mexico and Colombia want to learn more about gene editing. However, most are interested in learning about health, safety, and nutrition, rather than topics that might be perceived as more technical or not relevant.

INTEREST IN LEARNING MORE ABOUT GENE EDITING



TOP 3 TOPICS OF INTEREST

MEXICO

1	60%	NUTRITION AND HEALTH EFFECTS
2	42%	HOW IT'S MADE/HOW GENE EDITING WORKS IN ANIMALS
3	41%	ANIMAL HEALTH AND WELFARE

COLOMBIA

1	62%	NUTRITION AND HEALTH EFFECTS
2	40%	ANIMAL HEALTH AND WELFARE
3	35%	HOW IT'S MADE/HOW GENE EDITING WORKS IN ANIMALS

CANADA

1	46%	SAFETY AND TESTING
2	44%	NUTRITION AND HEALTH EFFECTS
3	39%	HOW IT'S MADE/HOW GENE EDITING WORKS IN ANIMALS

JAPAN

1	69%	SAFETY AND TESTING
2	50%	NUTRITION AND HEALTH EFFECTS
3	26%	PRICING AND AFFORDABILITY

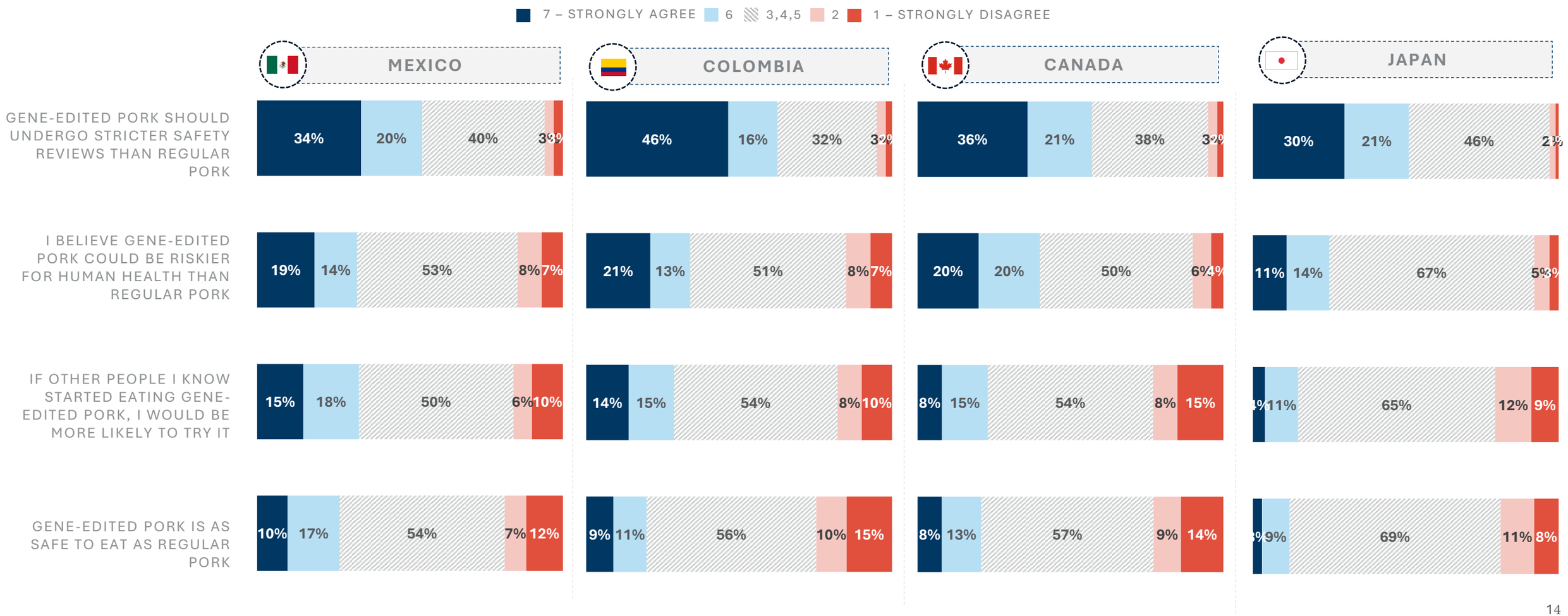
Q: How interested are you in learning more about gene editing in pork or other types of food? N=4,065
Q: Thinking of gene editing in pork or other types of food, what topics would you be most interested in learning about? N=4,065

Attitudes & Perceptions

Consumers want clear proof on safety before accepting gene-edited pork

Few believe gene-edited pork is as safe as regular pork, while slightly more see it as riskier – but most remain unsure. A significant share say it should undergo stricter safety testing, underscoring that many are open but need reassurance (rather than social cues) to be convinced.

PERSPECTIVES ON GENE-EDITED PORK

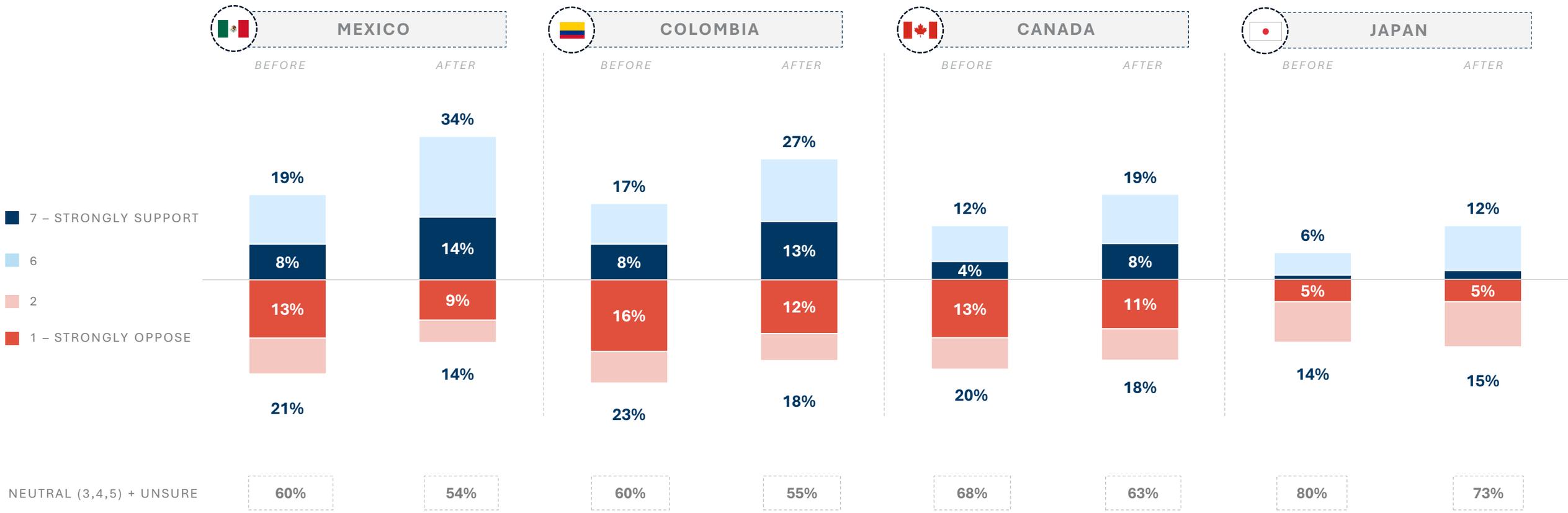


Q: To what extent do you agree or disagree with each of the following statements about gene-edited pork? Please select one option for each. N=4,065

Understanding drives modest gains in support, but mainly in Latin America

Support for gene-edited pork rises after consumers are shown a definition (significantly in all four countries, but most notably in Mexico). However, most consumers still fall in the ambivalent middle – unsure whether they support the technology.

OVERALL SUPPORT BEFORE VS. AFTER DEFINING GENE-EDITED PORK

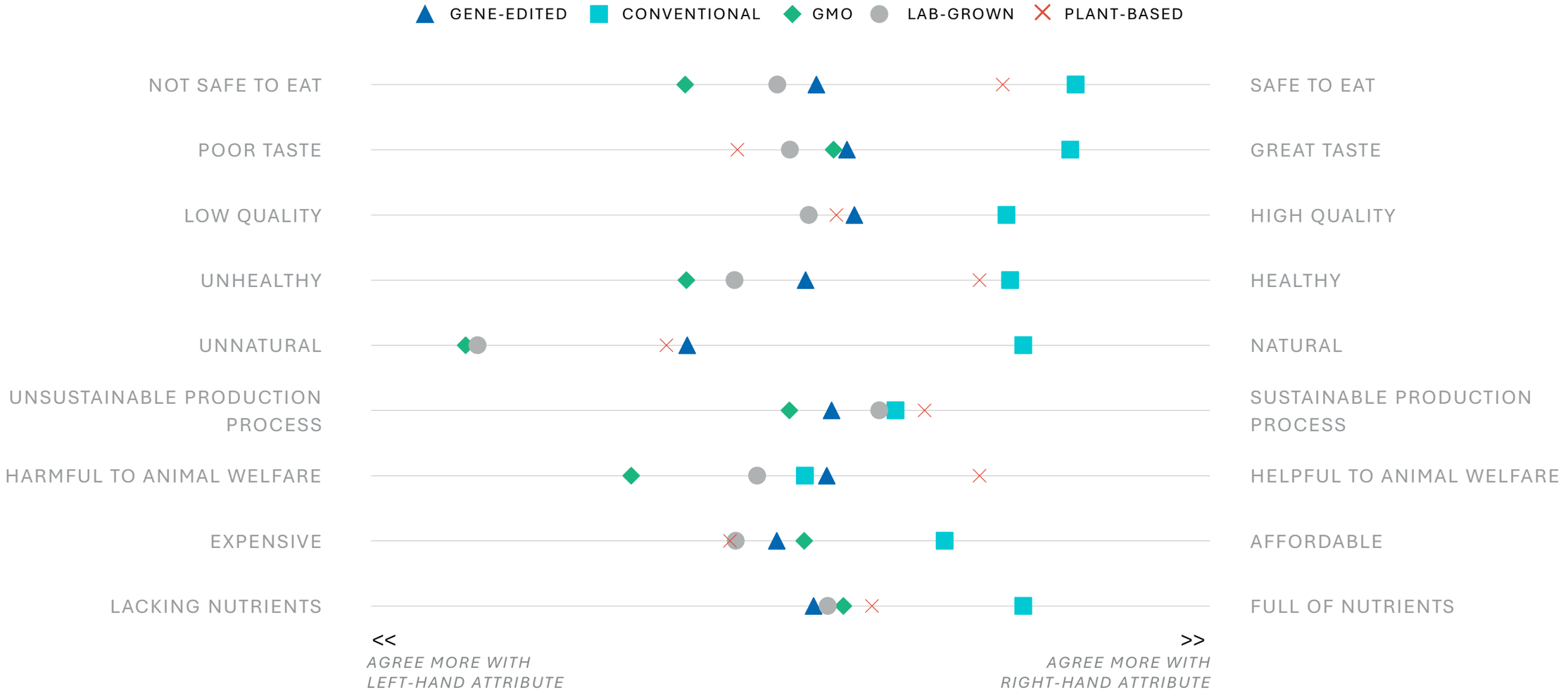


Q: To what extent do you support or oppose the use of gene editing specifically in pork? N=4,065
Q: Having read about how gene editing works, to what extent do you support or oppose the use of gene editing specifically in pork? N=4,065

Mexicans see gene-edited pork as comparatively healthier and more natural

Yet, while gene-edited pork is seen more favorably compared to GMO and lab-grown pork, it still significantly trails conventional pork. Only on animal welfare does gene-edited pork surpass conventional pork.

MEXICO: ATTRIBUTE ASSOCIATIONS ACROSS PORK TYPES

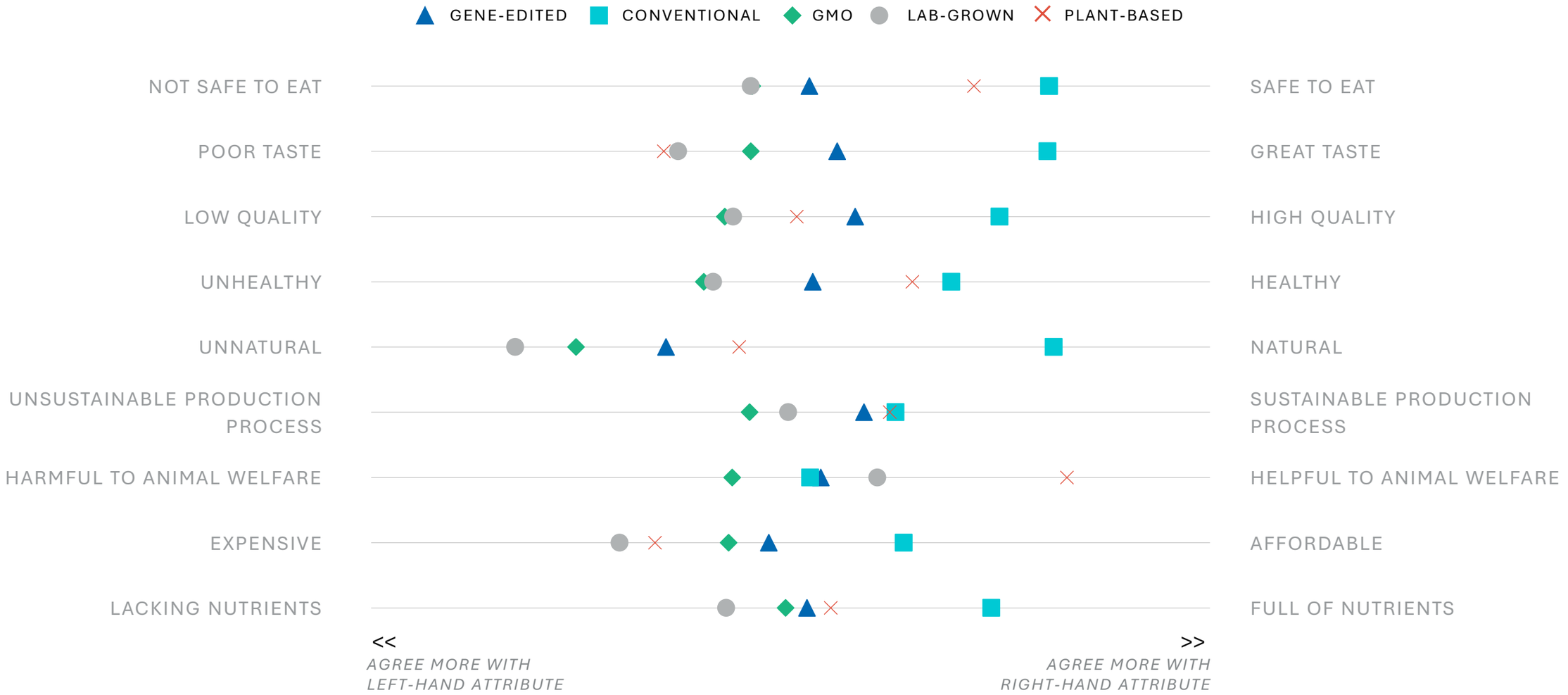


Q: In your opinion, which of the following attributes better describe [PORK TYPE]? For each pair of options, please indicate which option better describes it.

In Colombia, gene-edited pork leads other technologies on taste and quality

Elsewhere, Colombian consumers consistently rate gene-edited pork more favorably than GMO or lab-grown pork. However, it still lags conventional pork on all attributes with the largest gap being safety and naturalness.

COLOMBIA: ATTRIBUTE ASSOCIATIONS ACROSS PORK TYPES

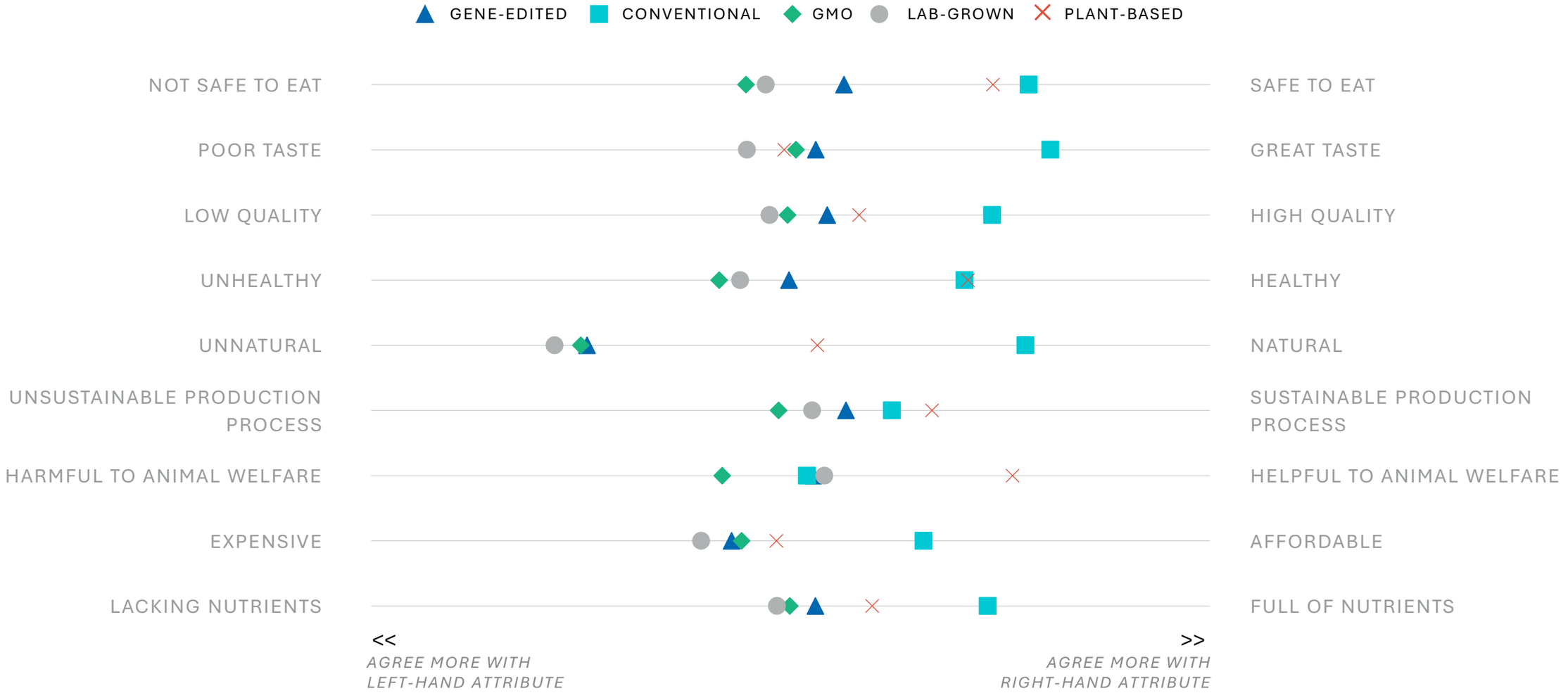


Q: In your opinion, which of the following attributes better describe [PORK TYPE]? For each pair of options, please indicate which option better describes it.

In Canada, gene-edited pork is mostly on par with GMO and lab-grown pork

Canadian consumers rate gene-edited pork as just as unnatural as GMO and lab-grown pork, albeit somewhat healthier and safer. Conventional pork leads on all attributes, except for animal welfare.

CANADA: ATTRIBUTE ASSOCIATIONS ACROSS PORK TYPES

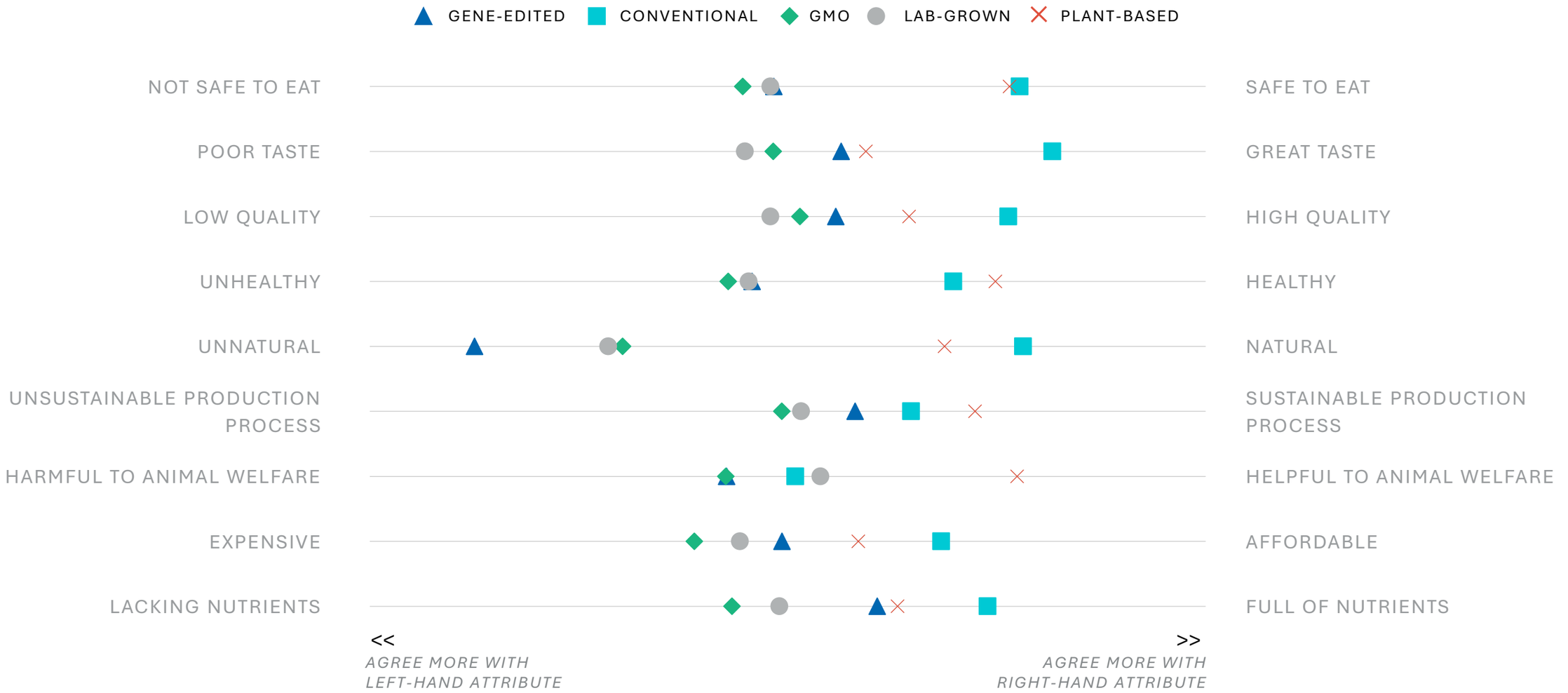


Q: In your opinion, which of the following attributes better describe [PORK TYPE]? For each pair of options, please indicate which option better describes it.

In Japan, gene-edited pork is seen as the most unnatural of all pork types

But gene-edited pork is generally viewed more favorably on most attributes compared to GMO or lab-grown meat. Aside from naturalness, the largest gaps with conventional pork are on safety, taste, and health.

JAPAN: ATTRIBUTE ASSOCIATIONS ACROSS PORK TYPES

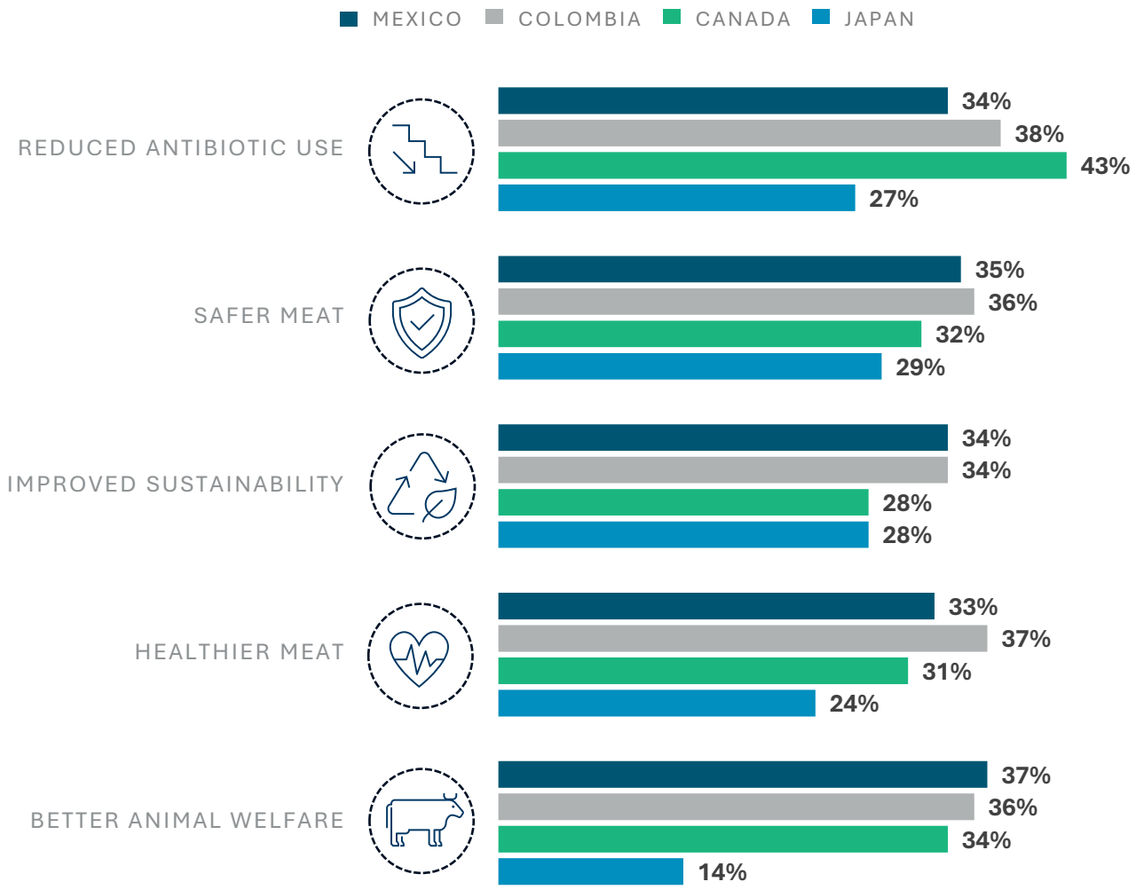


Q: In your opinion, which of the following attributes better describe [PORK TYPE]? For each pair of options, please indicate which option better describes it.

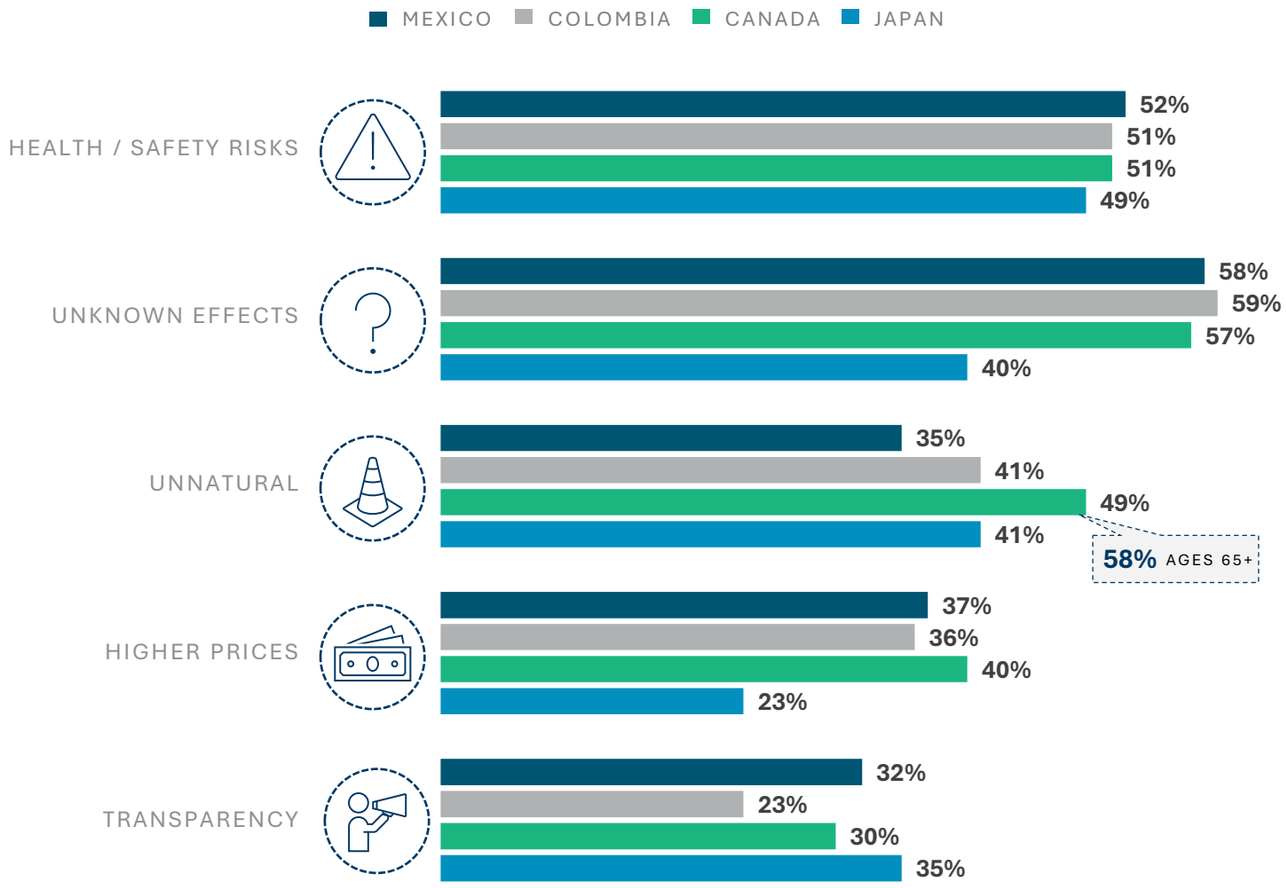
Concerns about gene-editing are more salient and personal than its benefits

Across countries, health / safety risks and unknown long-term effects top the list of worries – around half of consumers express concern. Benefits are less personally relevant than concerns are, and none clearly stand out.

TOP BENEFITS OF GENE-EDITED PORK



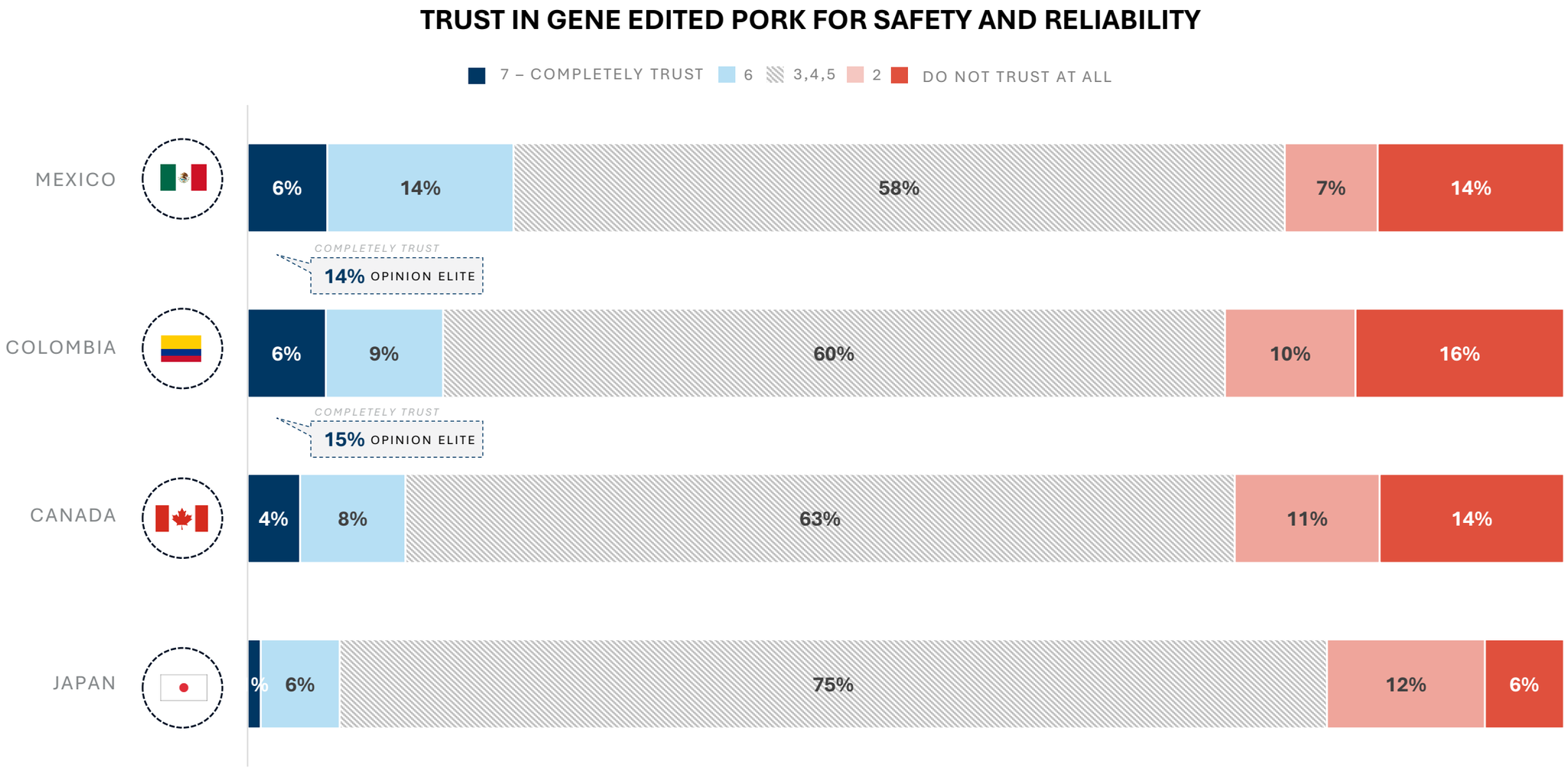
TOP CONCERNS WITH GENE-EDITED PORK



Q. In your opinion, what are the benefits of gene-edited pork? N=4,065
Q. Which concerns, if any, do you have about gene-edited pork? N=4,065

Given their concerns, consumers aren't yet enabled to trust gene-edited pork

Majorities across all markets remain unsure whether they can trust gene-edited pork as safe and reliable. However, this general skepticism reflects lack of familiarity rather than opposition.

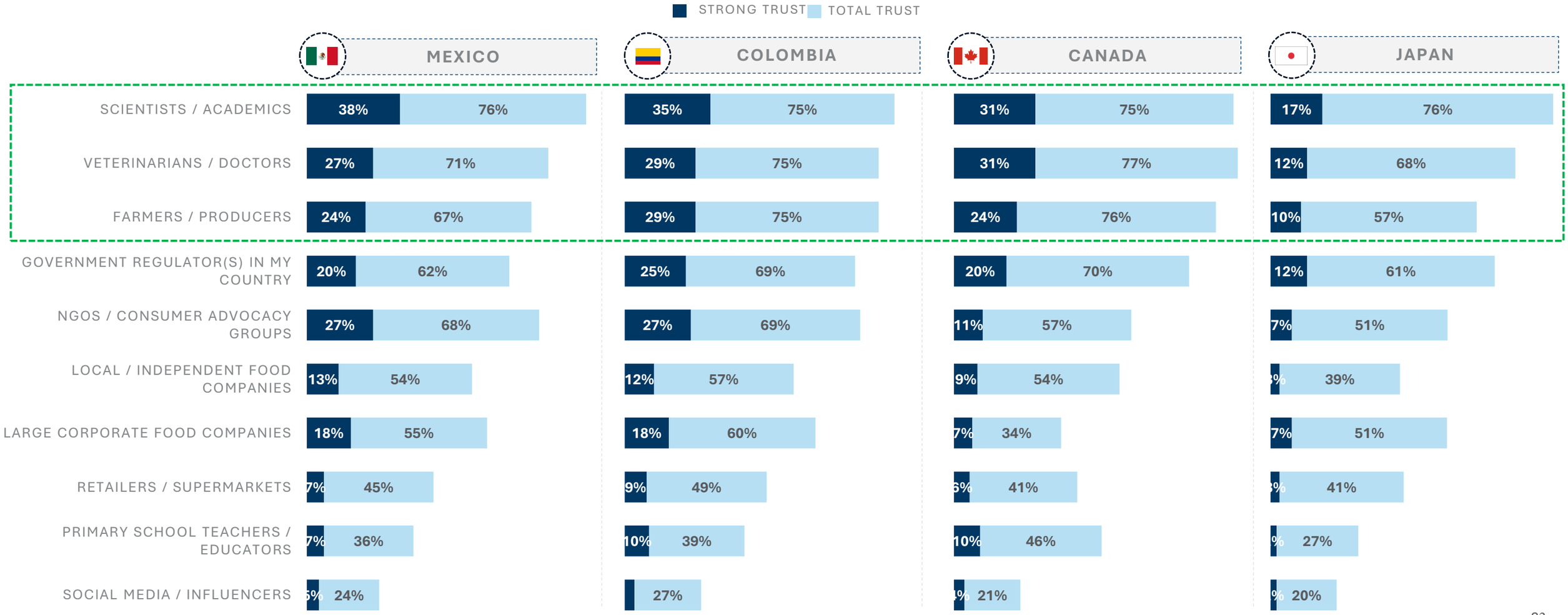


Q: How much do you trust that gene-edited pork would be safe and reliable for consumption? N=4,065

With baseline trust low, expert voices are key to building public confidence

Across markets, scientists, doctors, and farmers rank as the most trusted sources of information (followed by government regulators); trust in companies, retailers, and influencers is minimal, highlighting that credible communication must come from experts.

TRUSTED INSTITUTIONS ON GENE-EDITED PORK



Q: How much would you trust each of the following to ensure the safety of gene-edited pork? Please select one option for each. N=4,065

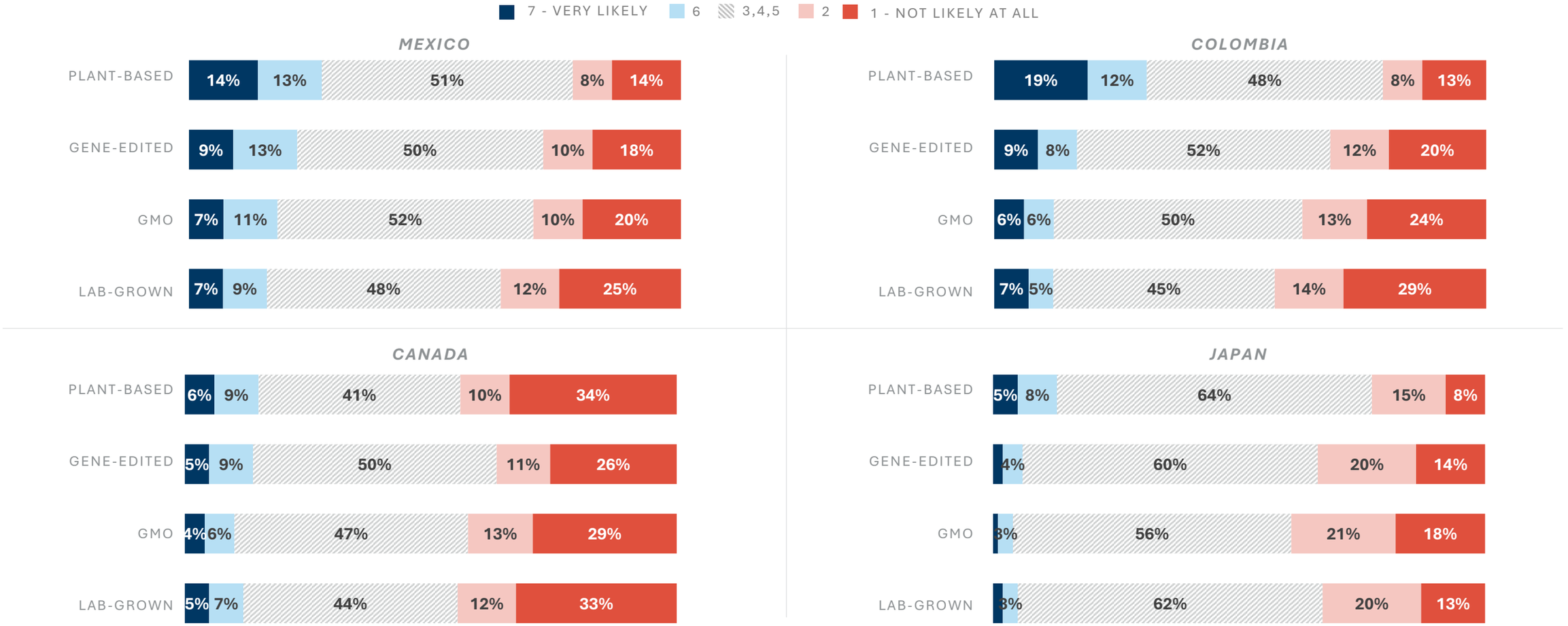
Purchase Intent

FTI CONSULTING

Purchase intent for gene-edited pork is limited, with some variation by market

Most consumers remain undecided or unlikely to buy. Mexico and Colombia show slightly higher openness, while Canada is most resistant. Across pork types, plant-based leads, gene-edited sits mid-range, and GMO/lab-grown trail behind.

PURCHASE LIKELIHOOD ACROSS PORK TYPES

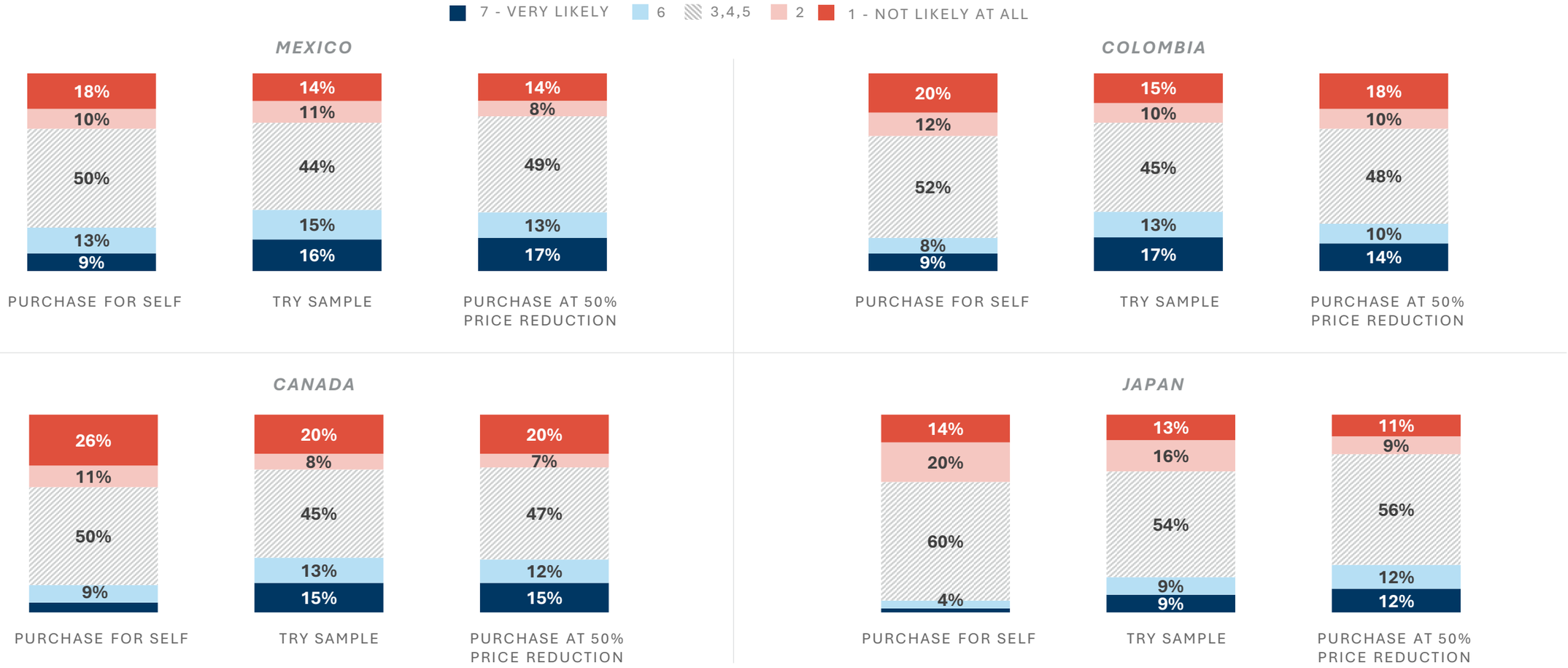


Q: If available in your local store, how likely would you be to purchase each of the following types of pork for your own consumption? N=4,065

Trials and lower prices boost intent slightly but don't notably change the story

Purchase intent rises slightly when gene-edited pork is offered as a free sample or significantly discounted but remains very low, underscoring that health and safety concerns, not price, are the core barrier.

GENE-EDITED PORK PURCHASE LIKELIHOOD IN DIFFERENT SCENARIOS



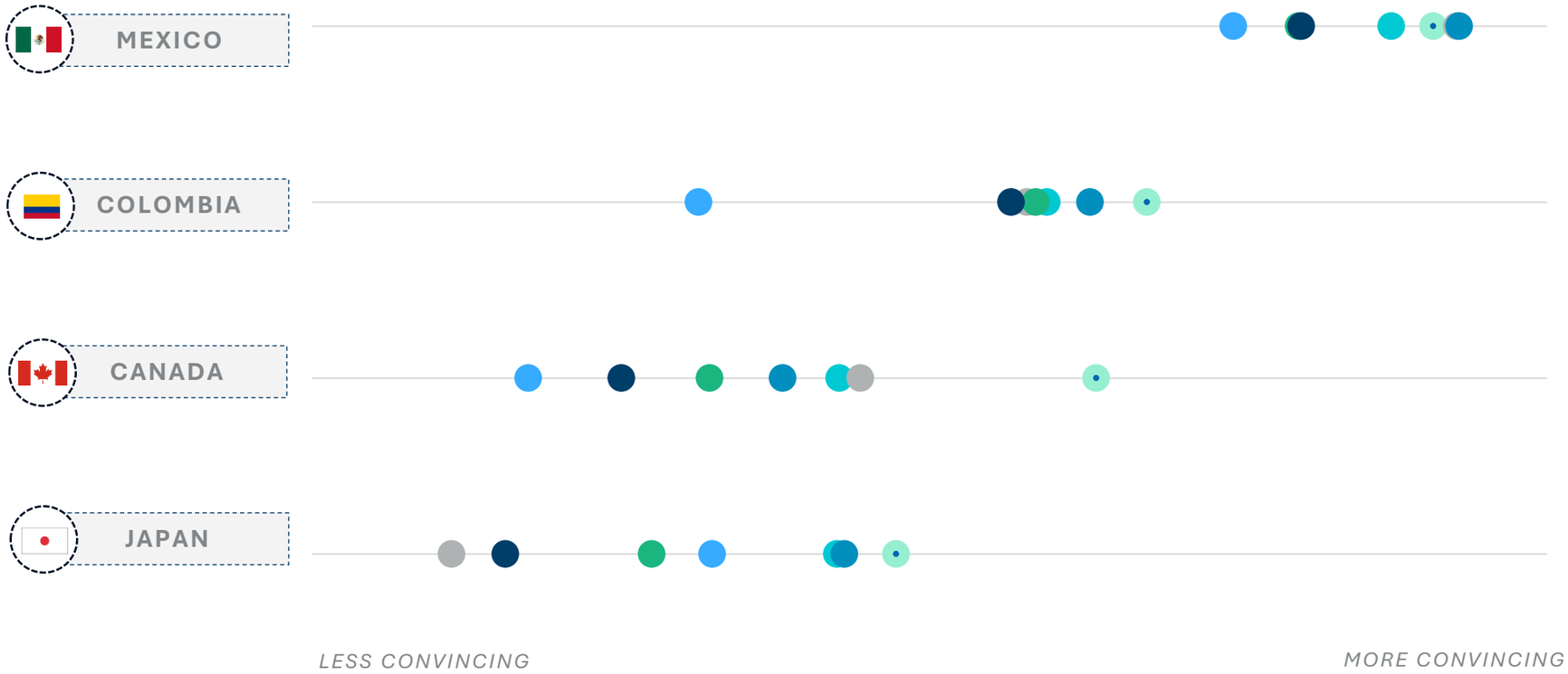
Q: If available in your local store, how likely would you be to purchase each of the following types of pork for your own consumption? N=4,065
Q: If you had the opportunity to try a sample of the following types of pork before buying, how likely would you be to try? N=4,065
Q: Now thinking specifically of gene-edited pork, how likely would you be to purchase it at each of the following price points (compared to regular pork)? N=4,065

Claims of reduced antibiotic use and better nutrition resonate most

Across markets, reduced antibiotic use among animals and better nutrition emerge as top performing themes, while better taste is least likely to be convincing for consumers. Animal welfare works well for Canada but performs poorly in Japan.

EFFECTIVENESS OF CLAIMS IN DRIVING PURCHASE LIKELIHOOD

AVERAGE CONVINCINGNESS



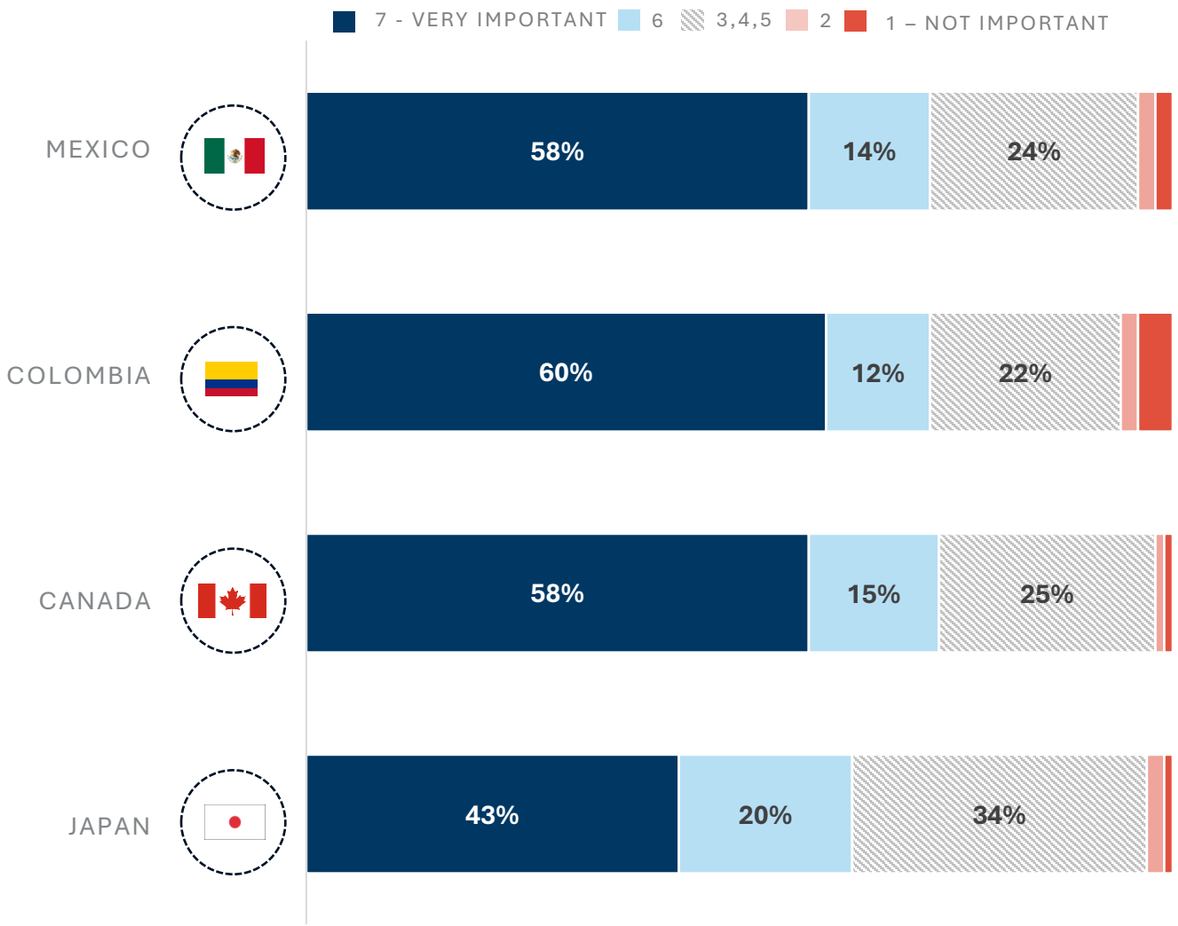
	TOTAL CONVINCING (%6/7)
BETTER TASTE/MORE FLAVORFUL	22%
SAME TECHNOLOGY THAT MIGHT ONE DAY CURE HUMAN DISEASES	24%
LOWER ENVIRONMENTAL FOOTPRINT	23%
BETTER NUTRITION	25%
MORE SUSTAINABLE PRODUCTION	25%
REDUCED ANTIBIOTIC USE AMONG ANIMALS	28%
IMPROVED ANIMAL WELFARE	25%

Q: Thinking of your likelihood to purchase gene-edited pork, how convincing are each of the following claims? Please select one option for each. N=4,065

Clear labeling is important to building trust in gene-edited pork

Majorities in all markets view labeling as important. Consumers in Canada and Japan mainly want a clear "gene-edited" statement, while in Latin America, consumers also look for government seals and nutritional details on the package.

IMPORTANCE OF CLEAR "GENE-EDITED" LABELS



TOP 3 ITEMS TO INCLUDE ON LABEL

MEXICO

1	57%	A CLEAR STATEMENT THAT THE PORK IS "GENE EDITED"
2	57%	GOVERNMENT OR REGULATOR APPROVAL SEAL
3	56%	NUTRITIONAL INFORMATION

COLOMBIA

1	61%	GOVERNMENT OR REGULATOR APPROVAL SEAL
2	60%	NUTRITIONAL INFORMATION
3	59%	A CLEAR STATEMENT THAT THE PORK IS "GENE EDITED"

CANADA

1	69%	A CLEAR STATEMENT THAT THE PORK IS "GENE EDITED"
2	59%	NUTRITIONAL INFORMATION
3	59%	GOVERNMENT OR REGULATOR APPROVAL SEAL

JAPAN

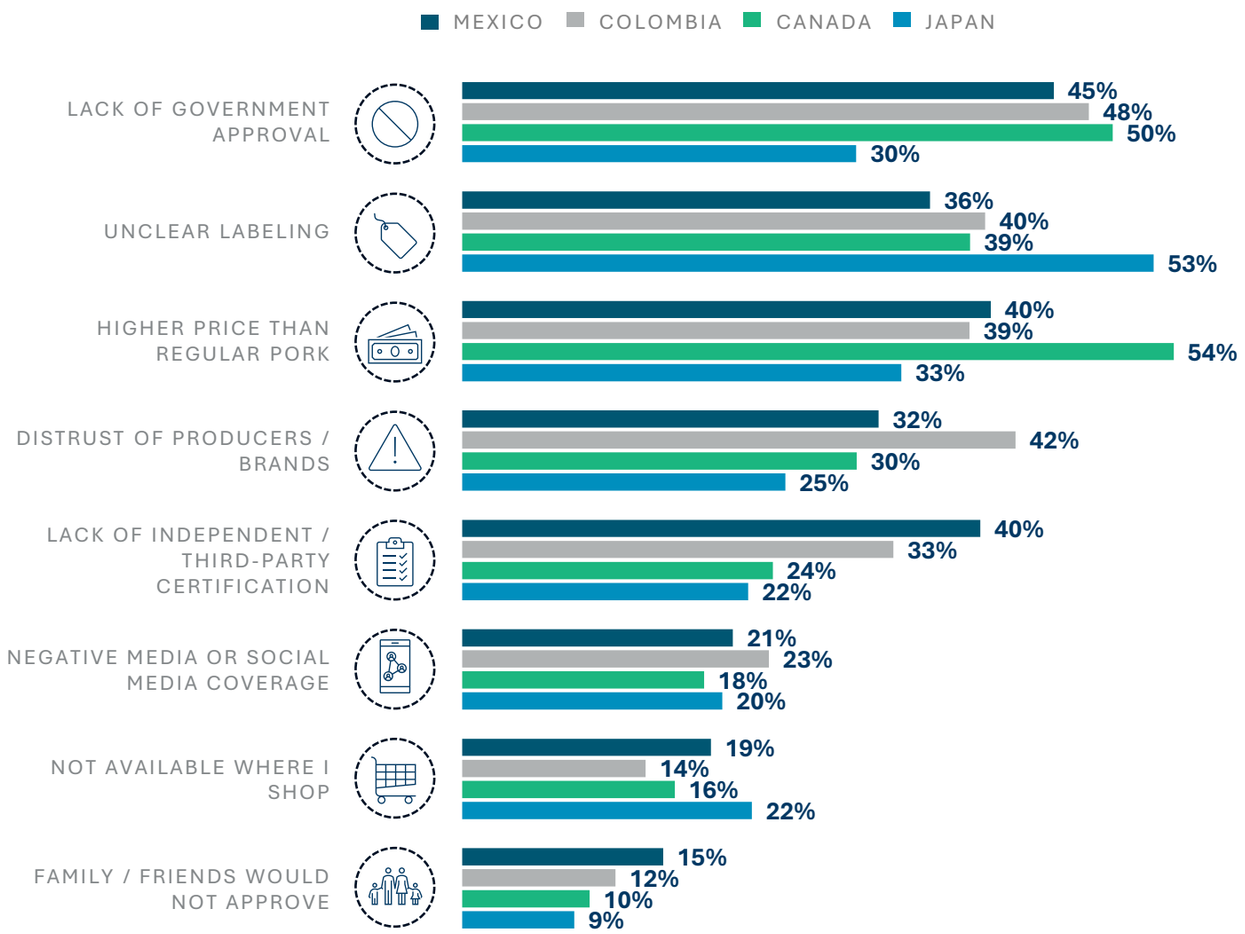
1	72%	A CLEAR STATEMENT THAT THE PORK IS "GENE EDITED"
2	54%	INFORMATION ON FOOD SAFETY TESTING RESULTS
3	49%	EXPLANATION OF GENE EDITING AND HOW IT IS DONE

Q: If you were purchasing gene-edited pork, how important would it be for you to see clear labels on the package that indicate it is gene-edited? N=4,065
Q: What information should packaging labels for gene-edited pork include? N=4,065

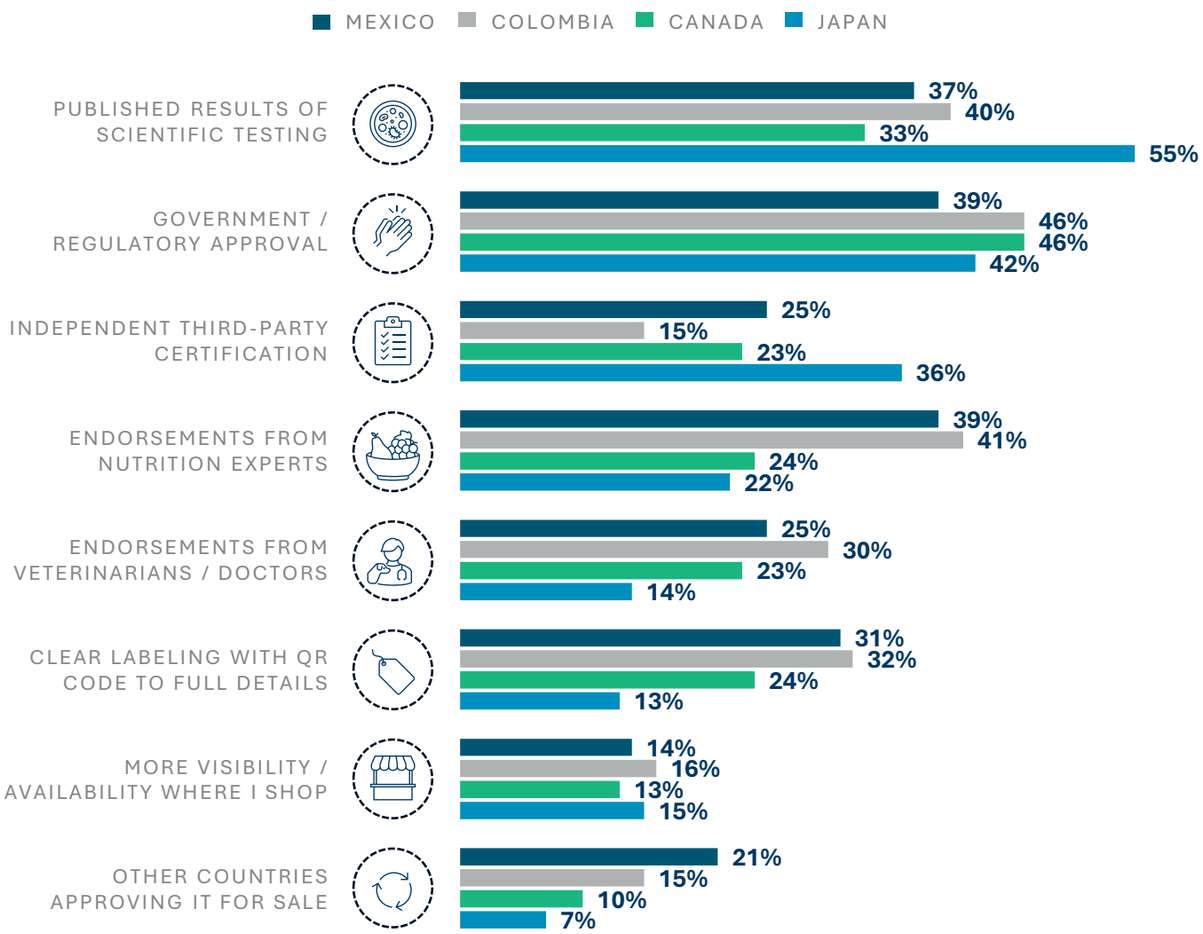
Barriers to purchase reflect fixable gaps in trust (e.g., labeling, approval)

Top deterrents include lack of government approval, unclear labeling, and higher prices, all of which can be definitively addressed. Independent testing and expert endorsements can serve to make people more comfortable with purchasing.

BARRIERS TO PURCHASING GENE EDITED PORK



FACTORS TO BOOST PURCHASE COMFORT

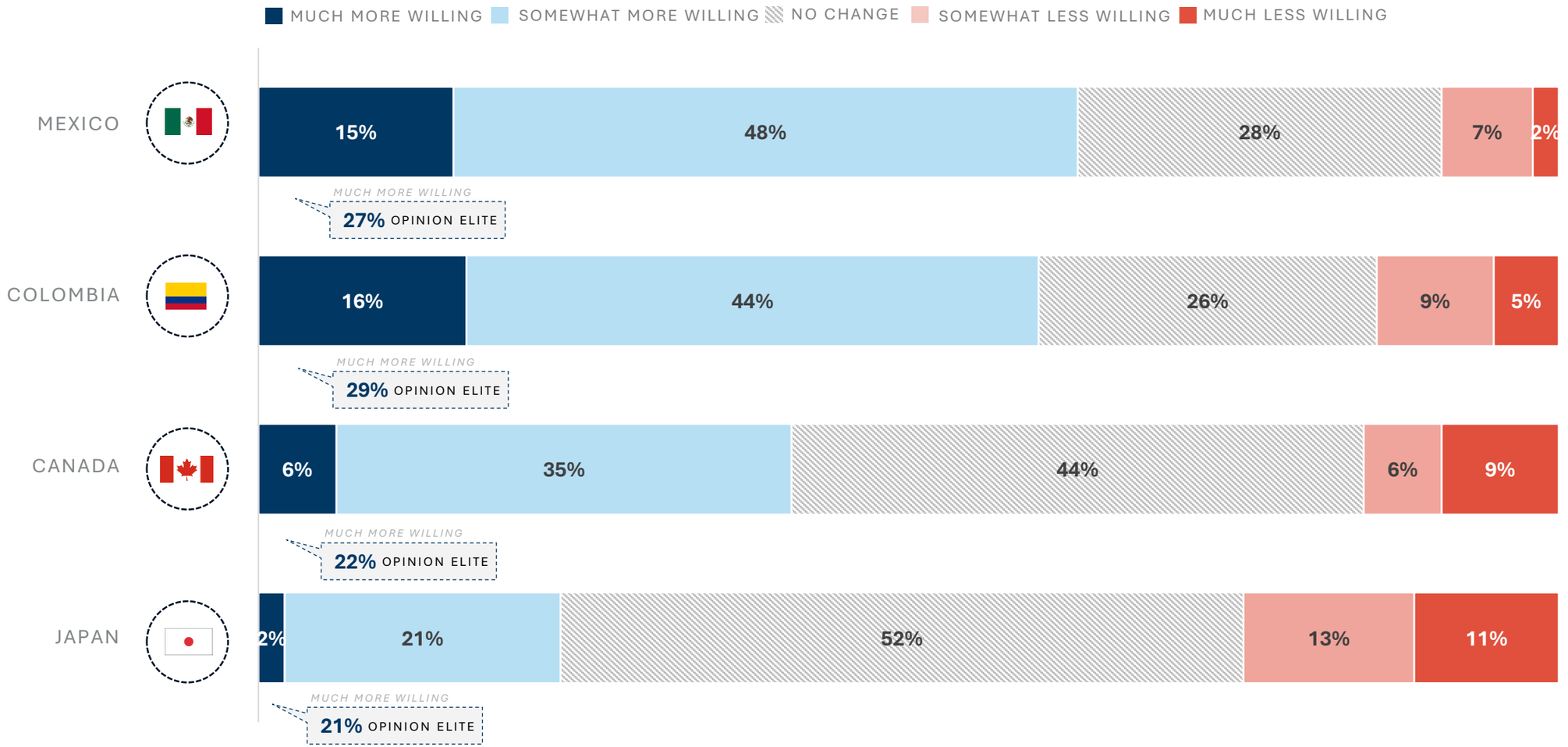


Q: What might prevent you from purchasing gene-edited pork? Please select all that apply. N=4,065
Q: What would make you more comfortable purchasing gene-edited pork? Please select all that apply. N=4,065

Without active trust building, openness may grow over time but will be limited

More than half of consumers in Mexico and Colombia expect to become more open to purchasing gene-edited pork. But in Canada and Japan, most foresee no change, suggesting limited momentum without additional education and reassurance.

EXPECTED FUTURE WILLINGNESS TO PURCHASE GENE-EDITED PORK

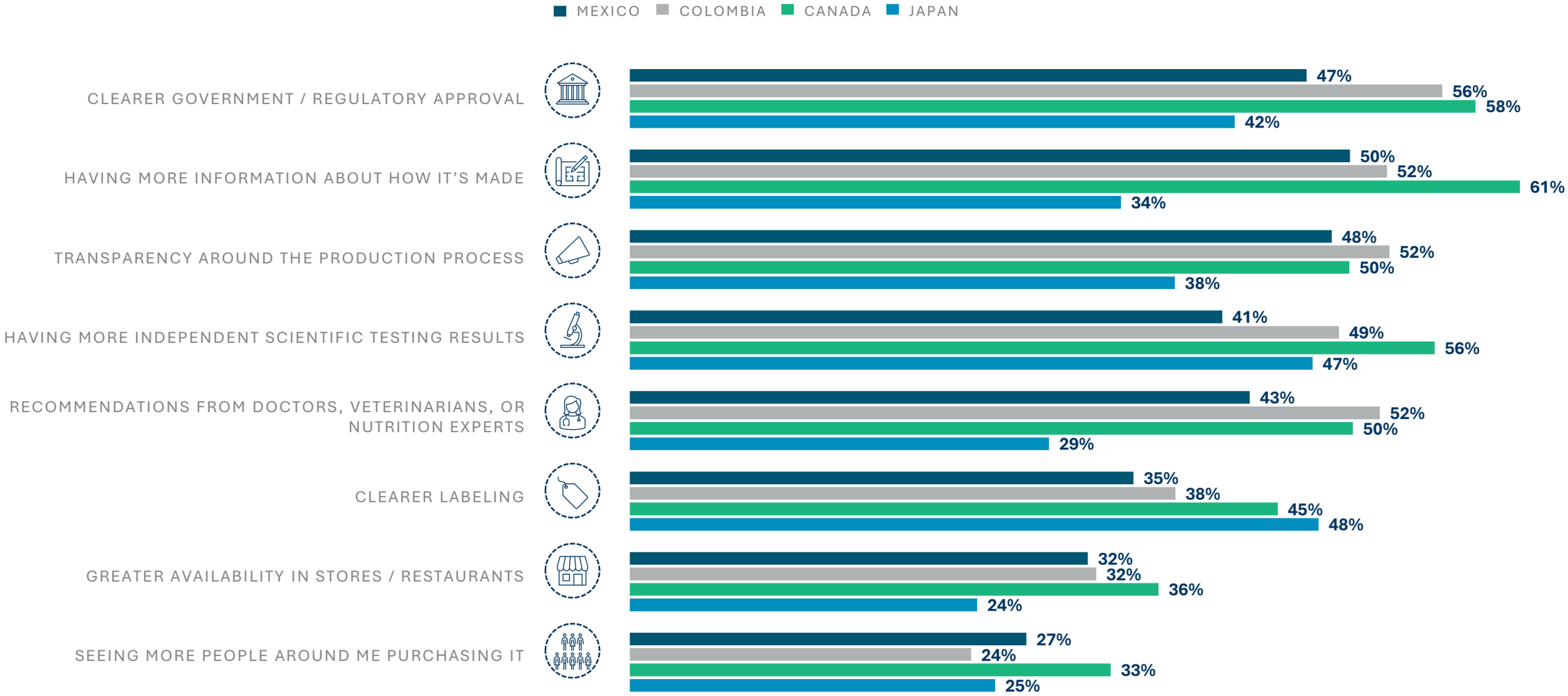


Q: How do you expect your personal willingness to purchase gene-edited pork to change in the future? N=4,065

Transparency and trusted validation drive willingness to try gene-edited pork

Consumers across markets say government approval, more background information, and transparency around production would increase their comfort with gene-edited pork. Building understanding appears more effective than increasing availability or visibility.

REASONS FOR INCREASED WILLINGNESS TO PURCHASE GENE-EDITED PORK



Q: You said you would be more willing to purchase gene-edited pork in the future. Why is that? Please select all that apply. N=4,065

Appendix

Perceptions of food technology vary by market, though few mention gene-editing

While "food processing and preservation" is a common association with food technologies in Canada, Colombia, and Japan, consumers in Mexico remain most focused on health and safety risks. Uncertainty and limited knowledge also emerge as recurring themes.

TOP "FOOD TECHNOLOGY" ASSOCIATIONS BY COUNTRY

MEXICO

1	63%	CONCERNS ABOUT HEALTH, SAFETY, AND NATURALNESS
2	27%	FOOD PRESERVATION AND PROCESSING TECHNOLOGIES
3	12%	ALTERNATIVE MEATS AND LAB-GROWN FOODS

COLOMBIA

1	67%	FOOD PRESERVATION AND PROCESSING TECHNOLOGIES
2	18%	ALTERNATIVE MEATS AND LAB-GROWN FOODS
3	17%	CONCERNS ABOUT HEALTH, SAFETY, AND NATURALNESS

CANADA

1	48%	ALTERNATIVE MEATS AND LAB-GROWN FOODS
2	32%	FOOD PRESERVATION AND PROCESSING TECHNOLOGIES
3	23%	CONCERNS ABOUT HEALTH, SAFETY, AND NATURALNESS

JAPAN

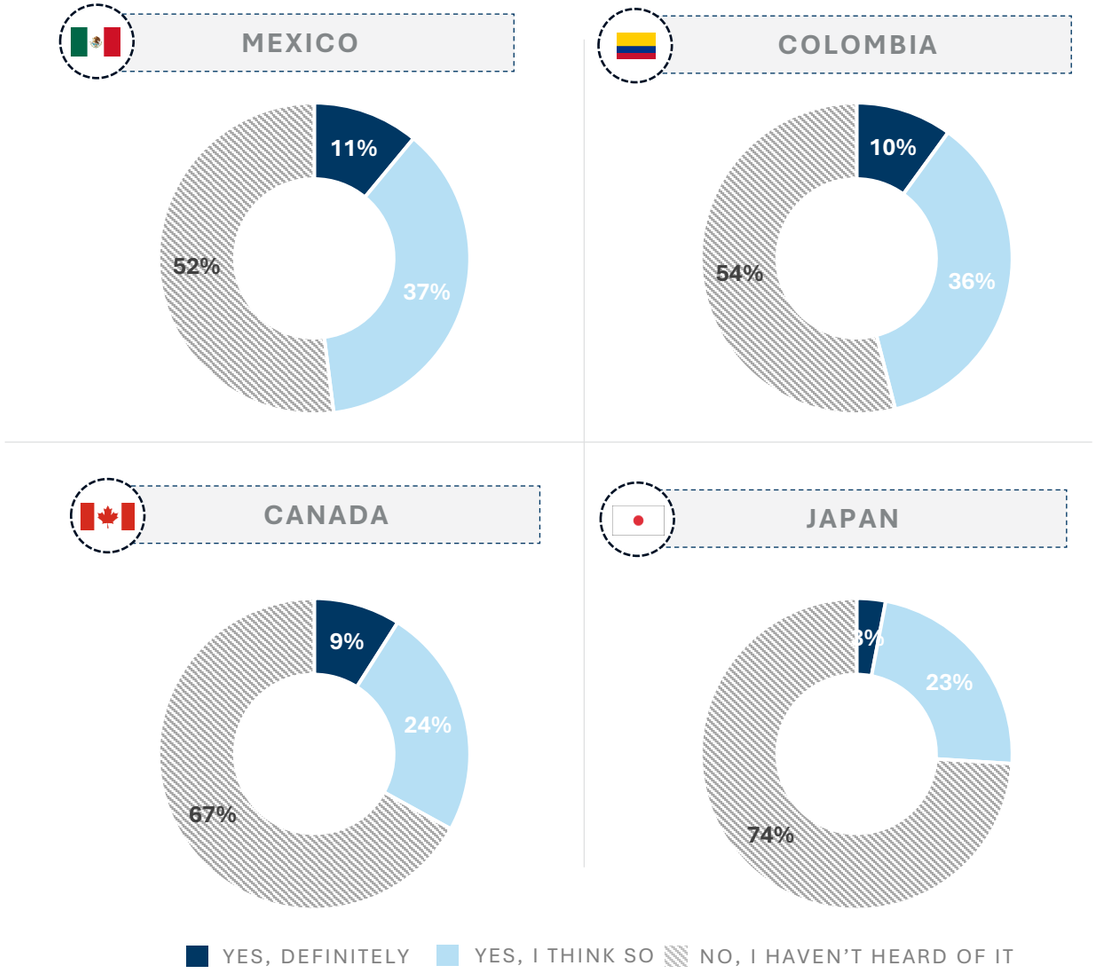
1	47%	FOOD PRESERVATION AND PROCESSING TECHNOLOGIES
2	43%	ALTERNATIVE MEATS AND LAB-GROWN FOODS
3	11%	CONCERNS ABOUT HEALTH, SAFETY, AND NATURALNESS

Q: When you think about new technologies in food or meat production, what comes to mind? N=4,065

While few have heard of gene editing, the most common source is social media

Reported awareness is higher in Mexico and Colombia, though many may have heard of a related technology such as genetic modification. Social media is by far the most common source of information, with the exception of Japan.

PREVIOUS AWARENESS OF GENE EDITING IN PORK



TOP 3 SOURCES OF INFORMATION ON GENE EDITING IN PORK

MEXICO

1	52%	SOCIAL MEDIA
2	36%	ONLINE NEWS SITES
3	28%	TV / RADIO NEWS

COLOMBIA

1	53%	SOCIAL MEDIA
2	34%	ONLINE NEWS SITES
3	26%	TV / RADIO NEWS

CANADA

1	38%	SOCIAL MEDIA
2	31%	ONLINE NEWS SITES
3	27%	TV / RADIO NEWS

JAPAN

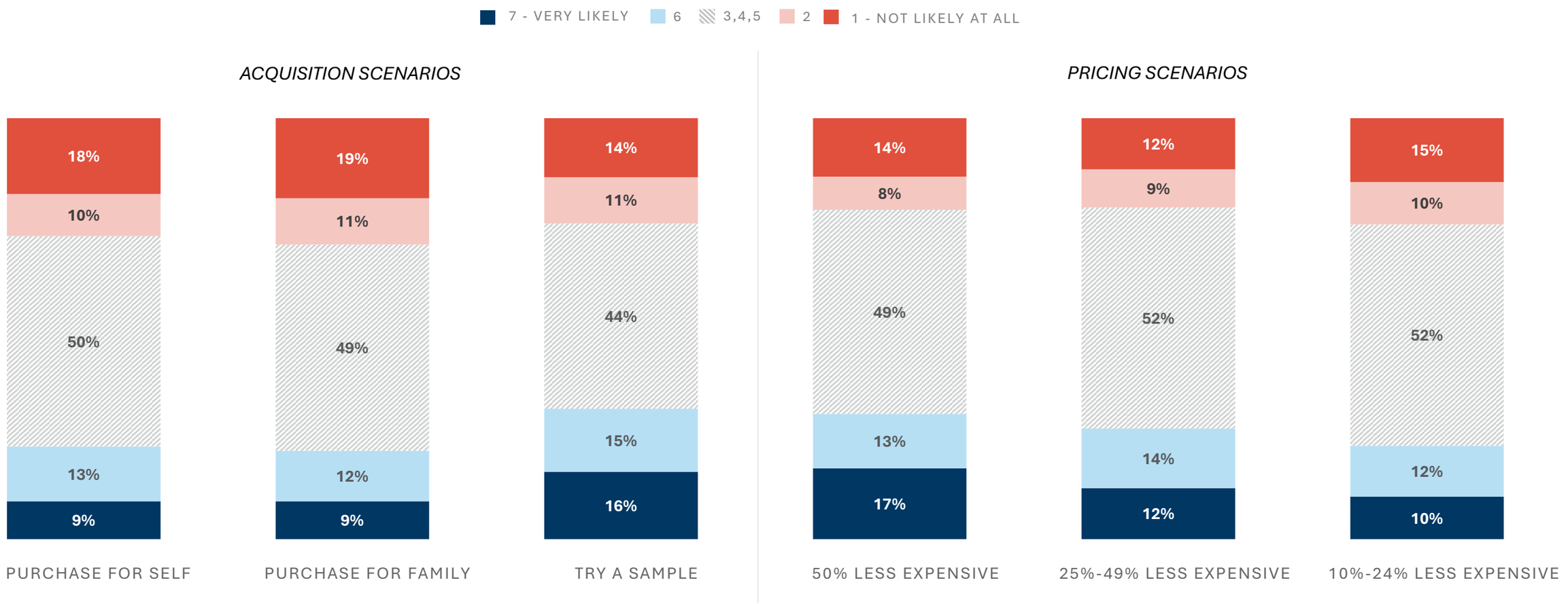
1	64%	TV / RADIO NEWS
2	36%	ONLINE NEWS SITES
3	28%	SOCIAL MEDIA

Q: Before today, had you heard about gene editing being used in pork production specifically?

In Mexico, the opportunity to try a sample leads to the highest likelihood

Purchase intent rises slightly when gene-edited pork is offered as a free sample or significantly discounted but remains very low, with majorities neutral or unlikely to purchase across all scenarios.

MEXICO: GENE-EDITED PORK PURCHASE LIKELIHOOD

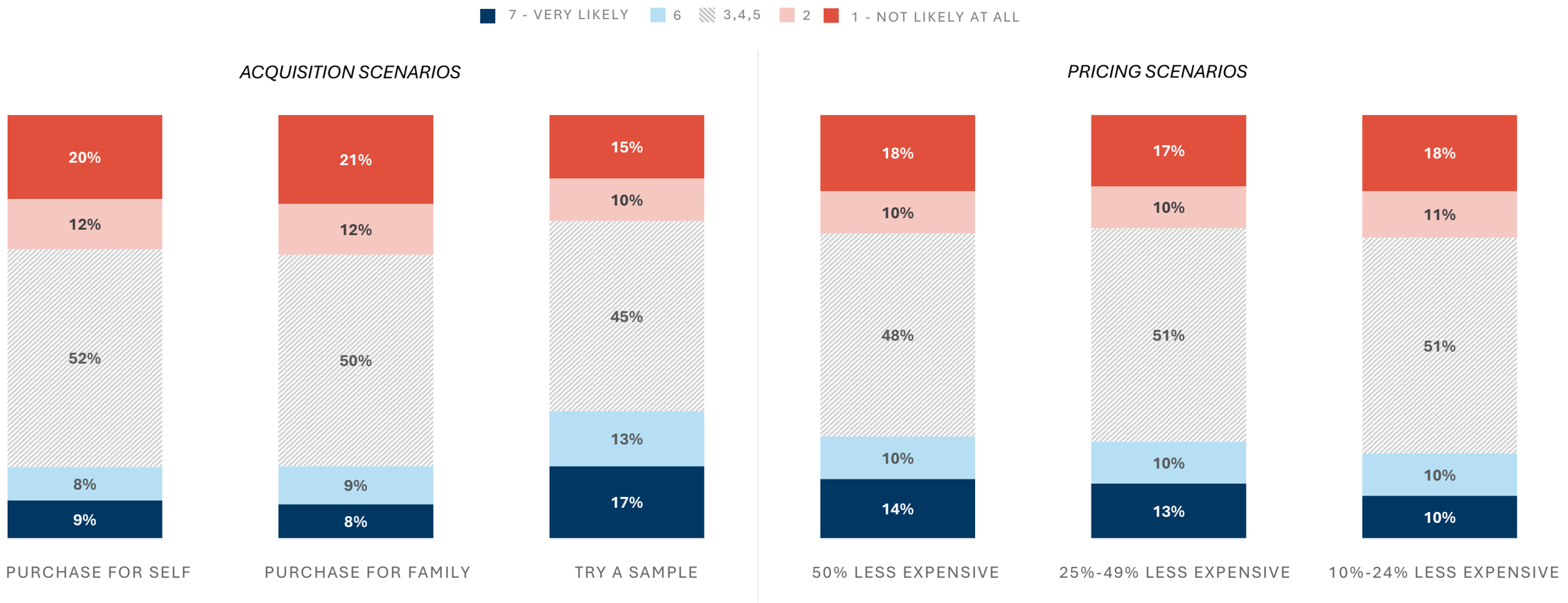


Q: If available in your local store, how likely would you be to purchase each of the following types of pork for your own consumption? N=4,065
Q:If you had the opportunity to try a sample of the following types of pork before buying, how likely would you be to try? N=4,065
Q: Now thinking specifically of gene-edited pork, how likely would you be to purchase it at each of the following price points (compared to regular pork)? N=4,065

Colombia is similar to Mexico, though slightly less influenced by lower prices

Purchase intent rises slightly when gene-edited pork is offered as a free sample or significantly discounted but remains very low, with majorities neutral or unlikely to purchase across all scenarios.

COLOMBIA: GENE-EDITED PORK PURCHASE LIKELIHOOD

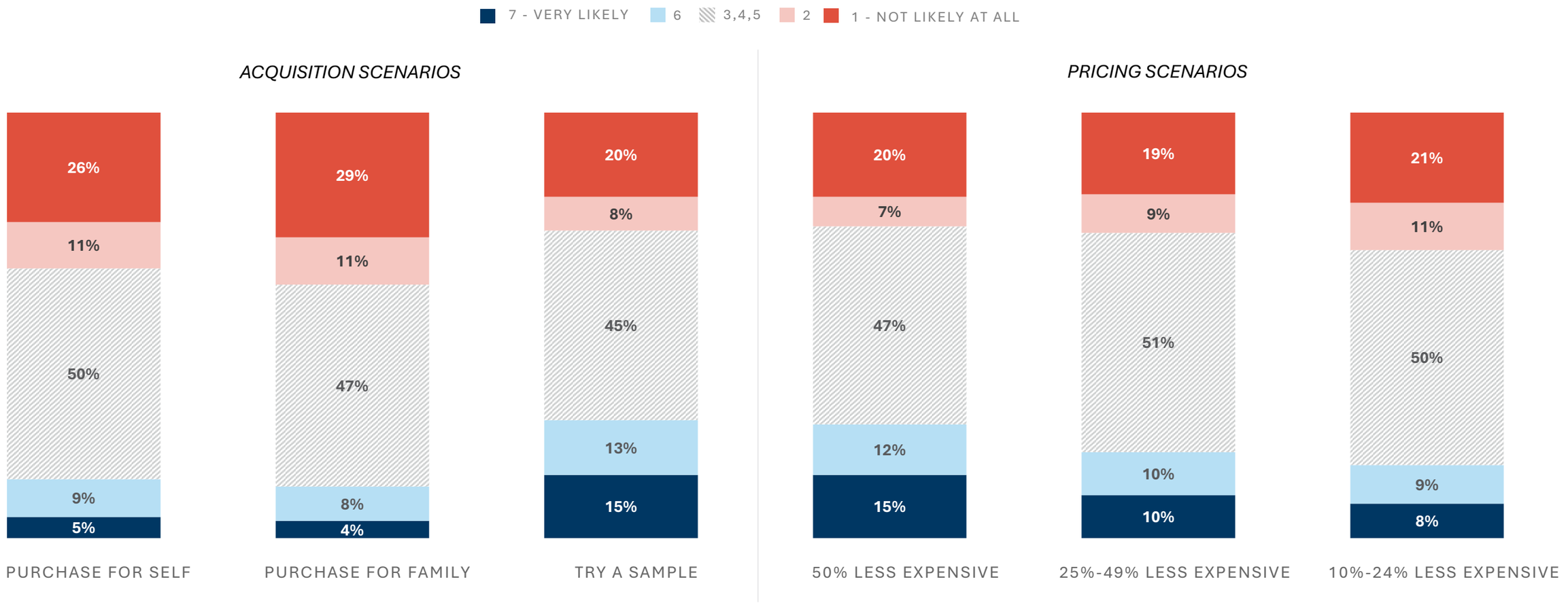


Q: If available in your local store, how likely would you be to purchase each of the following types of pork for your own consumption? N=4,065
Q:If you had the opportunity to try a sample of the following types of pork before buying, how likely would you be to try? N=4,065
Q: Now thinking specifically of gene-edited pork, how likely would you be to purchase it at each of the following price points (compared to regular pork)? N=4,065

In Canada, much lower prices and trial opportunities similarly boost likelihood

Purchase intent rises slightly when gene-edited pork is offered as a free sample or significantly discounted but remains very low, with majorities neutral or unlikely to purchase across all scenarios.

CANADA: GENE-EDITED PORK PURCHASE LIKELIHOOD

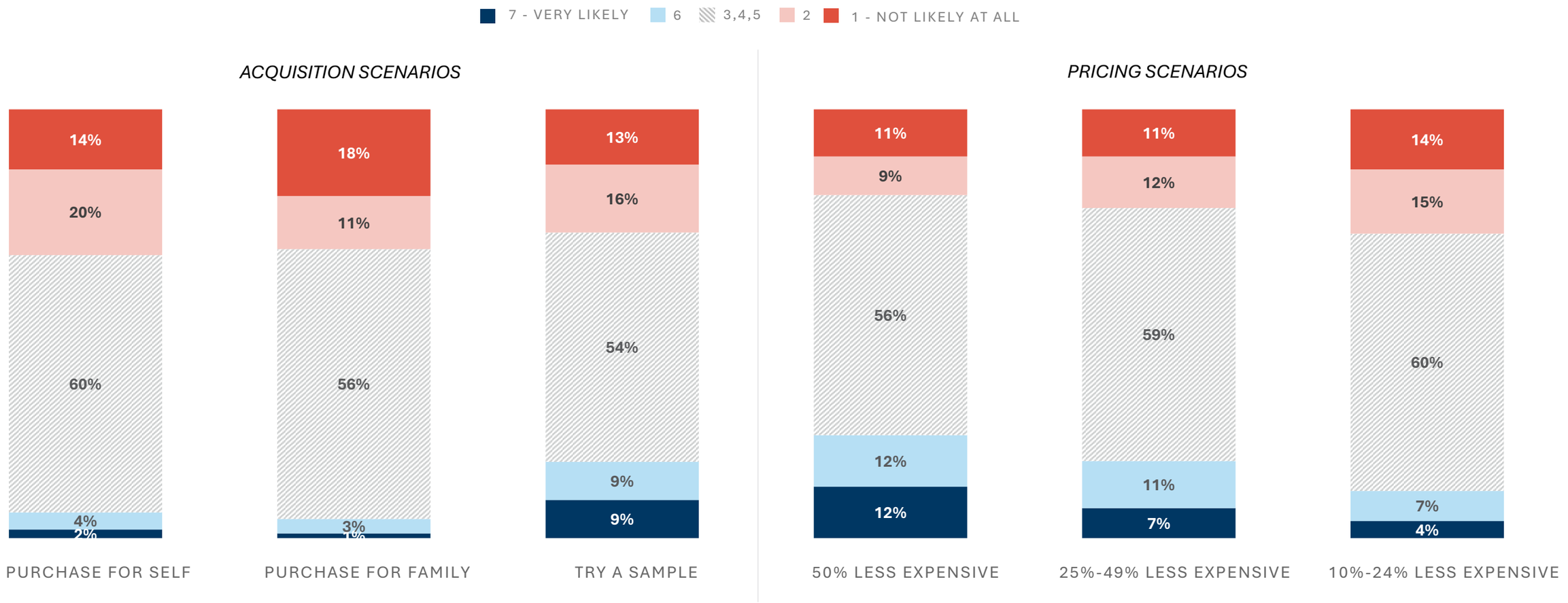


Q: If available in your local store, how likely would you be to purchase each of the following types of pork for your own consumption? N=4,065
Q:If you had the opportunity to try a sample of the following types of pork before buying, how likely would you be to try? N=4,065
Q: Now thinking specifically of gene-edited pork, how likely would you be to purchase it at each of the following price points (compared to regular pork)? N=4,065

Japan sees the lowest purchase likelihood across scenarios

Purchase intent rises slightly when gene-edited pork is offered as a free sample or significantly discounted but remains very low, with majorities neutral or unlikely to purchase across all scenarios.

JAPAN: GENE-EDITED PORK PURCHASE LIKELIHOOD



Q: If available in your local store, how likely would you be to purchase each of the following types of pork for your own consumption? N=4,065
Q:If you had the opportunity to try a sample of the following types of pork before buying, how likely would you be to try? N=4,065
Q: Now thinking specifically of gene-edited pork, how likely would you be to purchase it at each of the following price points (compared to regular pork)? N=4,065

Respondents saw the definitions listed below

This text was shown to respondents after capturing their initial reactions to the term "gene-edited pork" to allow for more informed perspectives on later questions.

PORK DEFINITIONS

SHOWN IN SURVEY TO ALL RESPONDENTS AFTER INITIAL AWARENESS/PERCEPTIONS QUESTIONS

GENE-EDITED PORK

"Gene-edited pork comes from pigs whose DNA has been changed using precise scientific tools, such as CRISPR. Unlike older methods of genetic modification (GMOs), gene editing involves making small changes within the animal's own genes, without adding genes from other species. These changes are made at the embryo stage, so the animal develops with the edits from birth and passes them on to future generations."

CULTIVATE/LAB GROWN PORK

"Cultivate / lab-grown pork is produced by taking cells from a pig and growing them in a lab or production facility (without raising and slaughtering an animal)."

GENETICALLY MODIFIED (GMO) PORK

"Genetically modified (GMO) pork comes from pigs whose DNA has been altered by inserting genes from another species or organism."

PLANT BASED PORK SUBSTITUTES

"Plant-based pork substitutes are products made entirely from plants (such as soy, peas, or wheat) that are designed to look, taste, or cook like pork. They contain no animal products."