

U.S. Brands Under Pressure?

Transatlantic tensions and their consequences for consumer behavior in Germany

NIMpulse

14



Nuremberg Institute for Market Decisions e. V.

Founder of GfK

Steinstr. 21 | 90419 Nuremberg | nim.org

February 2026

The Nuremberg Institute for Market Decisions (NIM) is a nonprofit research institute at the interface of academia and practice. NIM examines how consumer decisions change due to new technology, societal trends, or the application of behavioral science, and what the resulting micro- and macroeconomic impacts are for the market and for society as a whole. A better understanding of consumer decisions and their impacts helps society, businesses, politics, and consumers make better decisions with regard to “prosperity for all” in the sense of the social-ecological market system.

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Suggested citation

Gangl, K., & Biró, T. (2026). U.S. Brands Under Pressure? Transatlantic tensions and their consequences for consumption in Germany. *NIMPulse 14*

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Authors



Dr. Katharina Gangl
katharina.gangl@nim.org



Tobias Biró
tobias.biro@nim.org

Background to the study

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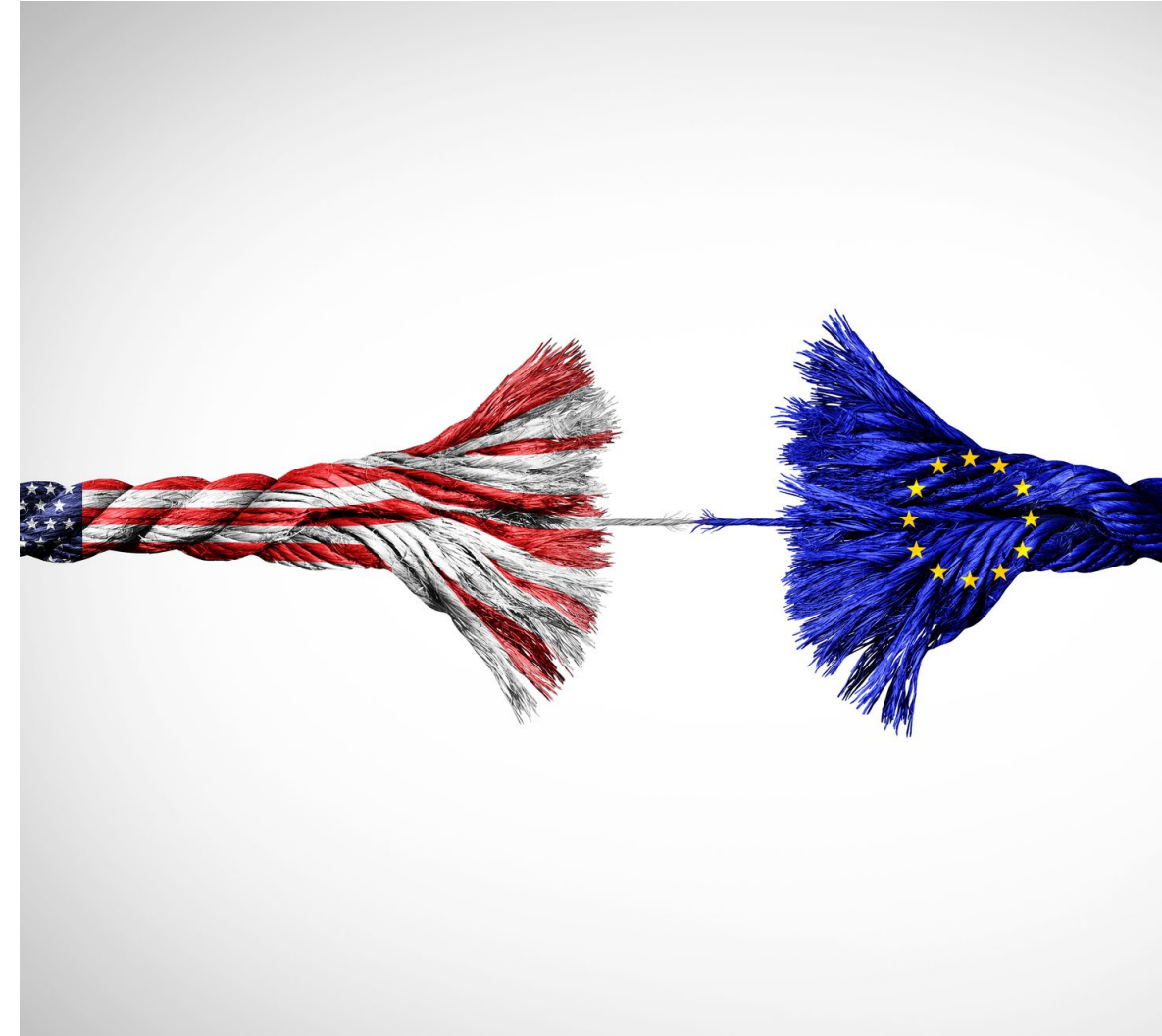
The transatlantic trade structure has been characterized by considerable tensions, especially since Donald Trump took office. The current U.S. president has not only imposed new tariffs on European goods, but has also caused political uncertainty through threats to withdraw from the Atlantic security alliance. Additionally, with the implied annexation of Greenland, there were initial calls to boycott American products in Denmark.



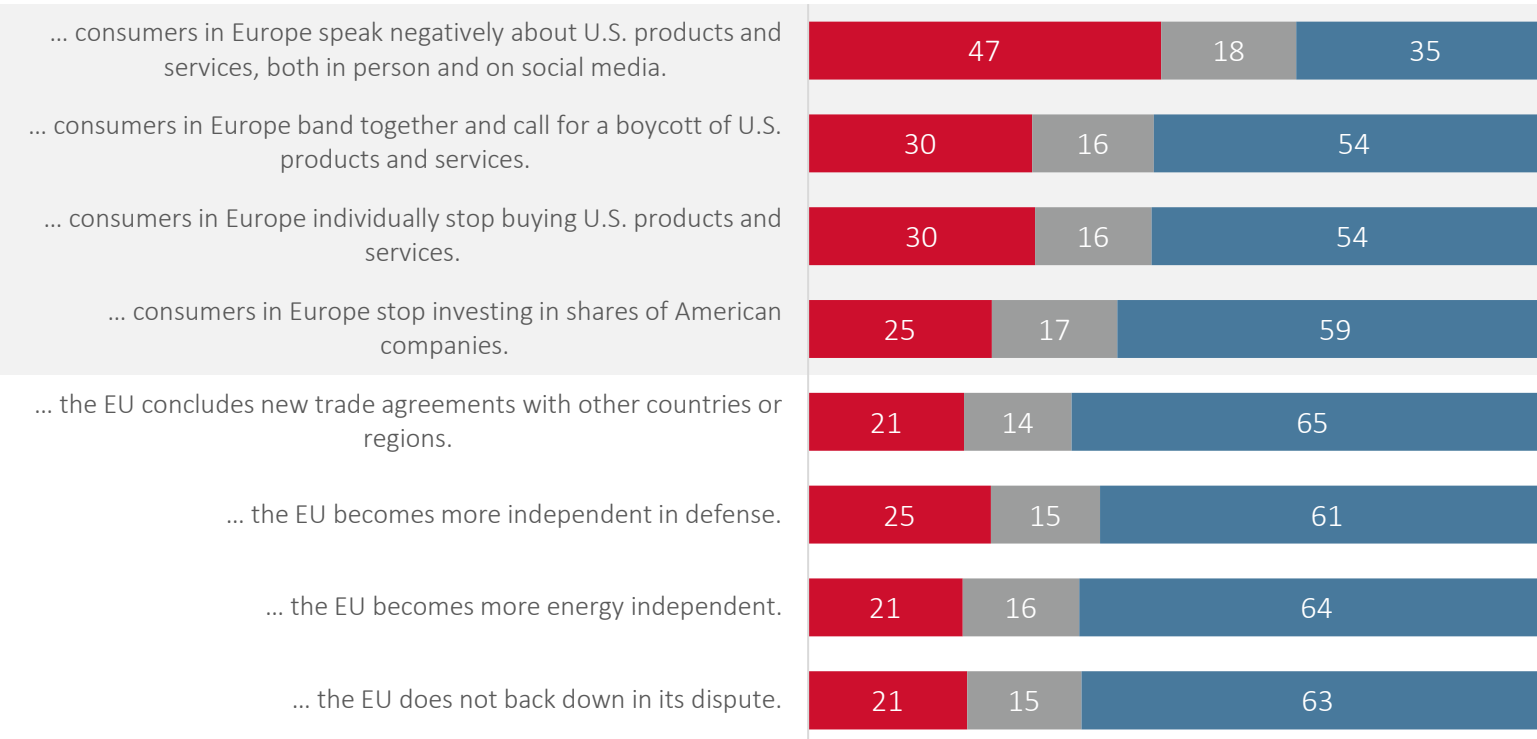
Against this background, this study examines whether and how consumers in Germany are reacting to this situation. The aim is to clarify the extent to which political differences affect the perception of American brands and whether this leads to a deliberate purchase avoidance or even to boycott efforts.

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To this end, the Nuremberg Institute for Market Decisions (NIM) surveyed a representative sample of adults in Germany at the beginning of 2026. The focus is on the question of whether U.S. products are deliberately avoided and whether consumers would like greater transparency about product origin.



Question: What effect do you think the following would have on U.S. President Donald Trump's policies? If ...

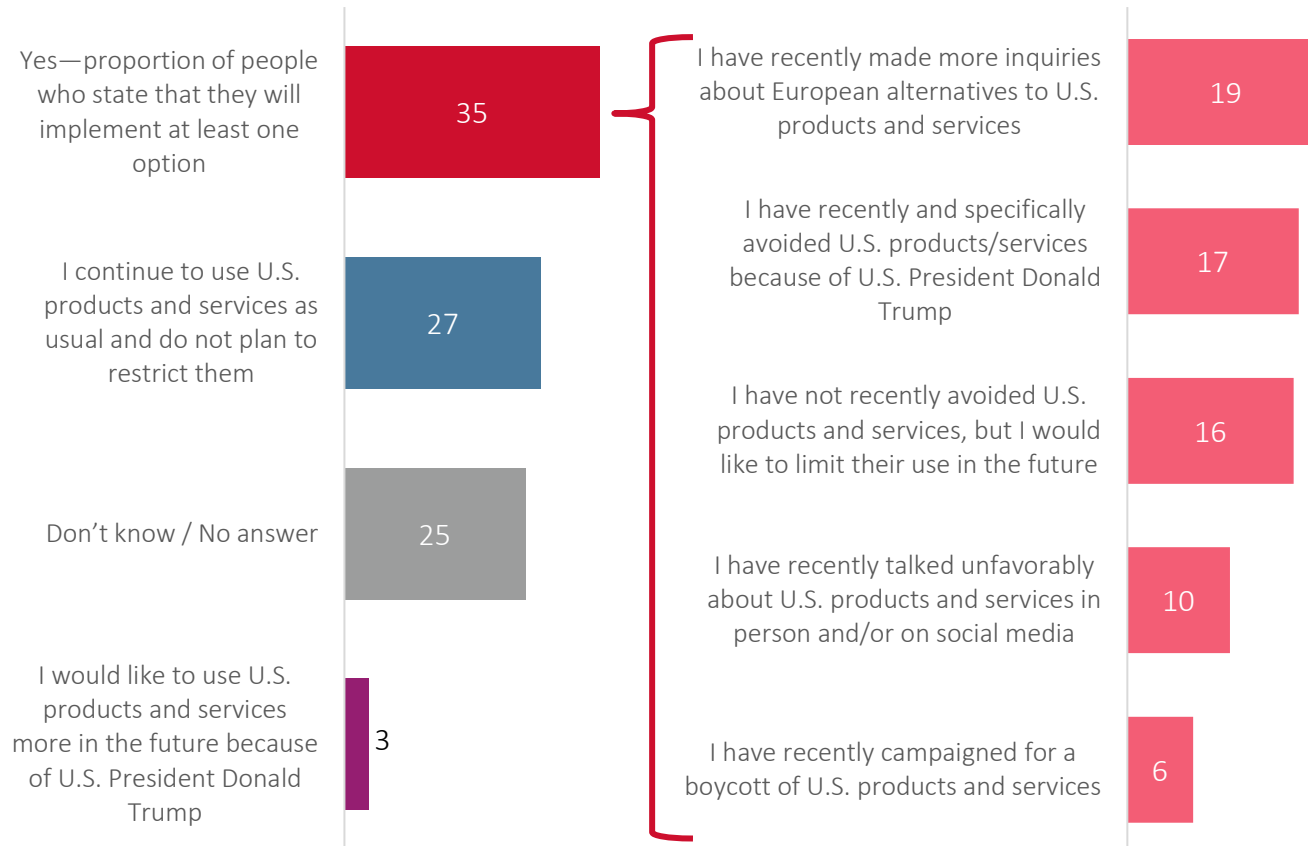


■ No/little effect
 ■ Don't know
 ■ Greater/major effect

- > People in Germany see opportunities to influence U.S. President Trump's policies through their own consumer behavior, even more so through EU policy.
- > More than half of those surveyed believe that there would be a greater effect if consumers bought fewer U.S. products.
- > In each case, over 60% of respondents believe that EU options such as new trade agreements or robust countermeasures to U.S. initiatives are effective.

Single choice per statement | Values in % | n = 1,006 | Survey period: 01.29.2026–02.02.2026 | NIMpulse 14 | nim.org

Question: Have you recently refrained from using U.S. products/services in response to U.S. President Donald Trump?



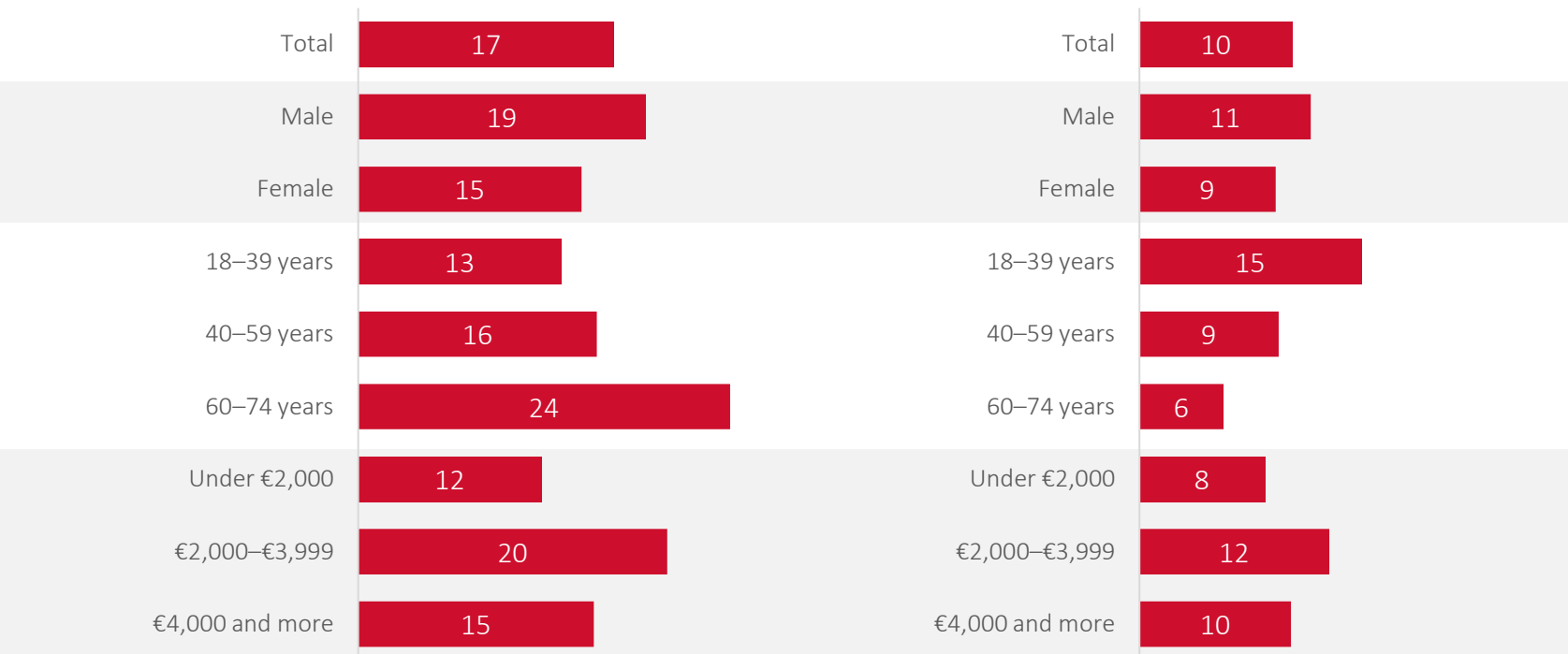
- > Among those surveyed, 35% report that U.S. policy has influenced their consumer behavior or their attitude toward U.S. brands.
- > Specifically, 17% state that they have avoided U.S. products or services.
- > As many as 19% have recently searched for European alternatives, while 16% would like to limit their use of U.S. products.
- > On the other hand, 27% continue to use U.S. brands as usual and have no plans to restrict their use.

Multiple choices possible | Values in % | n = 1,006 | Survey period: 01.29.2026–02.02.2026 | NIMpulse 14 | nim.org

Question: Have you recently refrained from using U.S. products/services in response to U.S. President Donald Trump?

I have recently specifically avoided U.S. products/services because of U.S. President Donald Trump

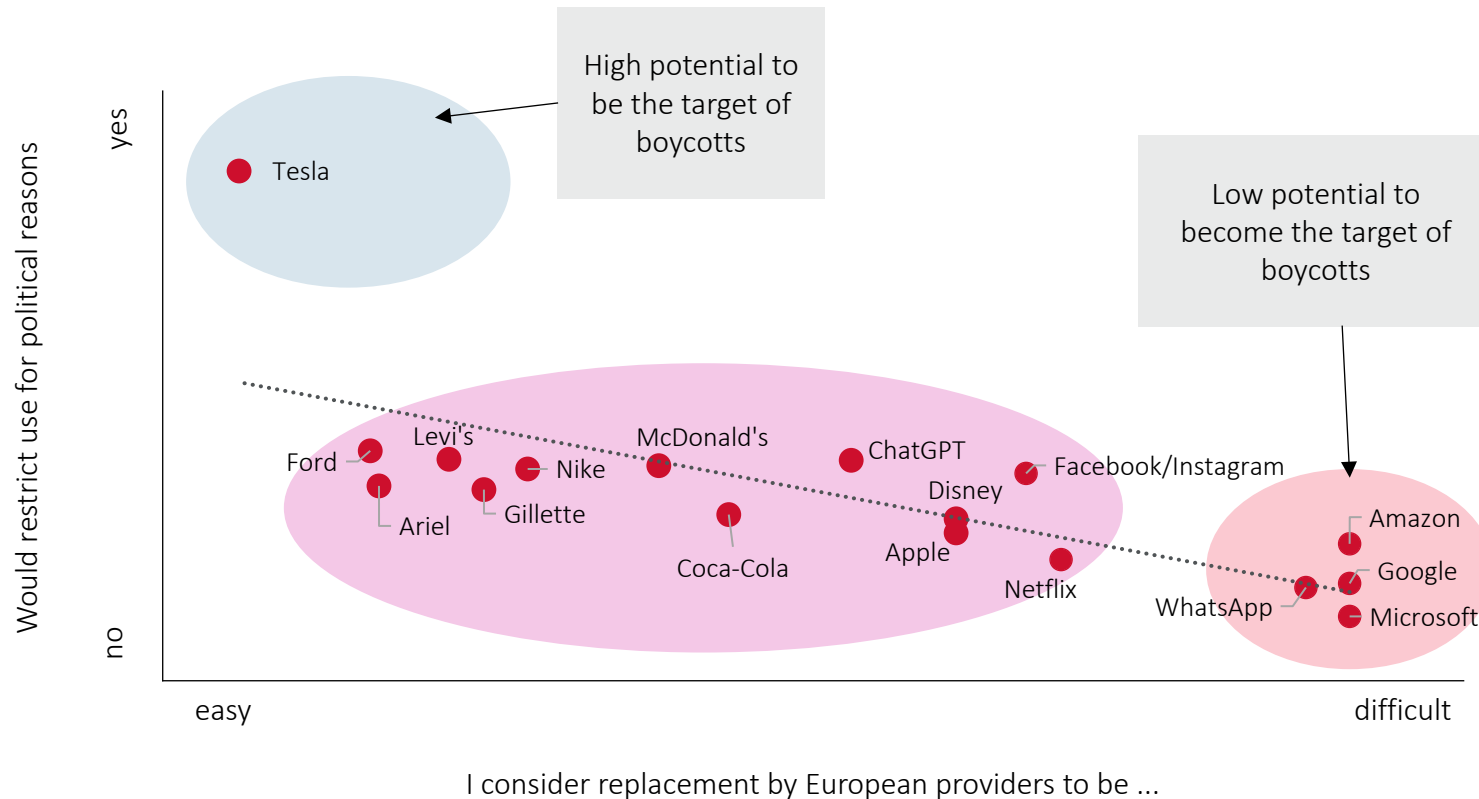
I have recently talked unfavorably about U.S. products and services in person and/or on social media



- > Differences in how people deal with U.S. brands are particularly evident by age group.
- > Younger people state comparatively often that they speak negatively about U.S. products and services. While 15% of 18- to 39-year-olds report doing this, the figure for 60- to 74-year-olds is only 6%.
- > In contrast, older people are more likely than average to say they have recently avoided U.S. brands (60- to 74-year-olds: 24%, 18- to 39-year-olds: 13%).

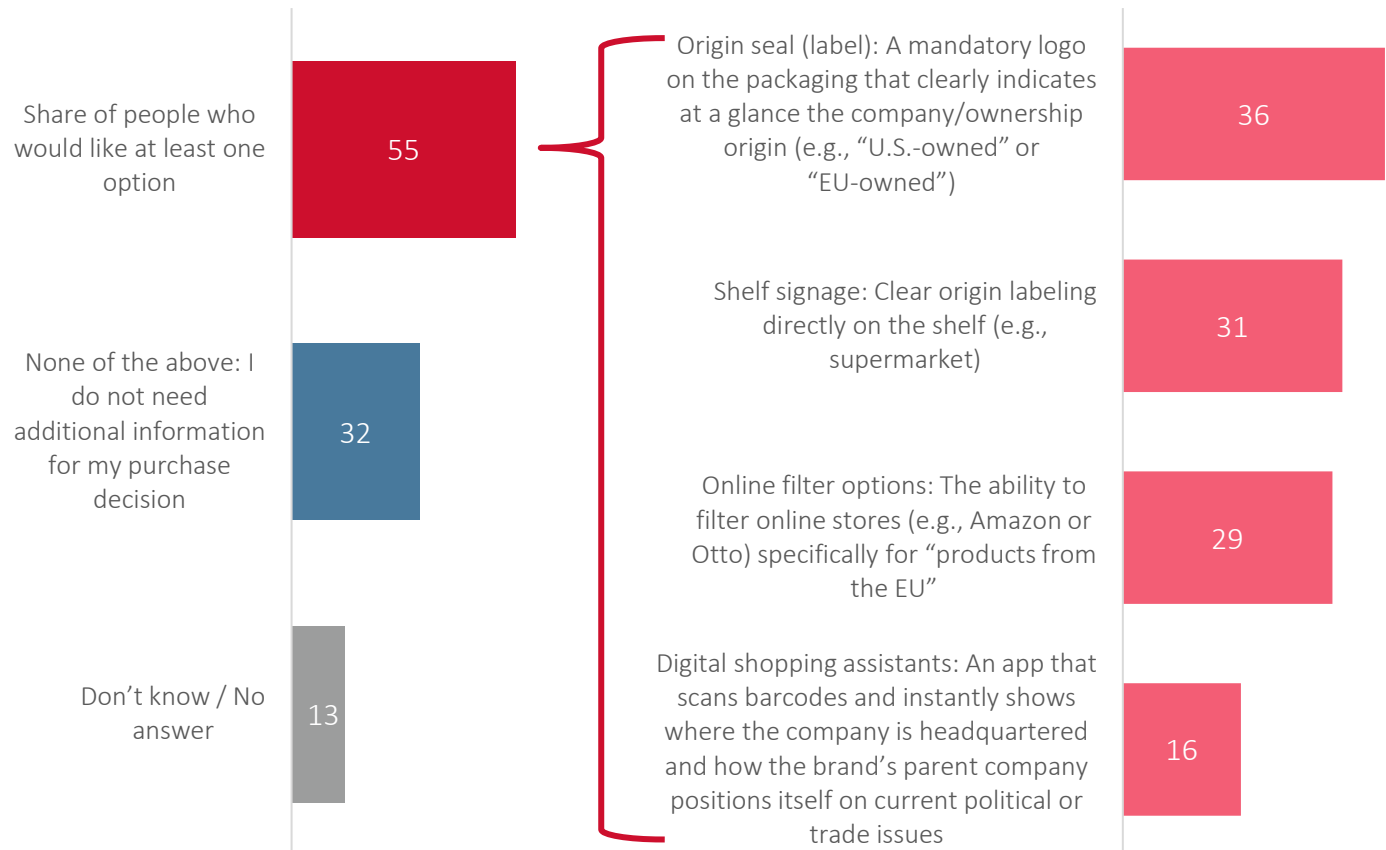
Multiple choices possible | Values in % | n = 1,006 | Survey period: 01.29.2026–02.02.2026 | NIMpulse 14 | nim.org

Questions: (a) How easy would it be for you to replace each of the following products or services with a supplier/brand from Europe?
 (b) Next, please indicate whether you would want to restrict the products or services of the supplier/brand for political reasons.



- > Large tech companies such as Google and Amazon are seen as difficult to replace, and only a few people say they want to use them less. Successful boycotts are unlikely here.
- > Other U.S. brands are in the middle range in terms of replaceability, with very few people currently wanting to reduce their demand for them. Boycotts are currently unlikely here, but they are conceivable.
- > The only brand that is currently considered easily replaceable and that many people say they would like to avoid in the future is Tesla.

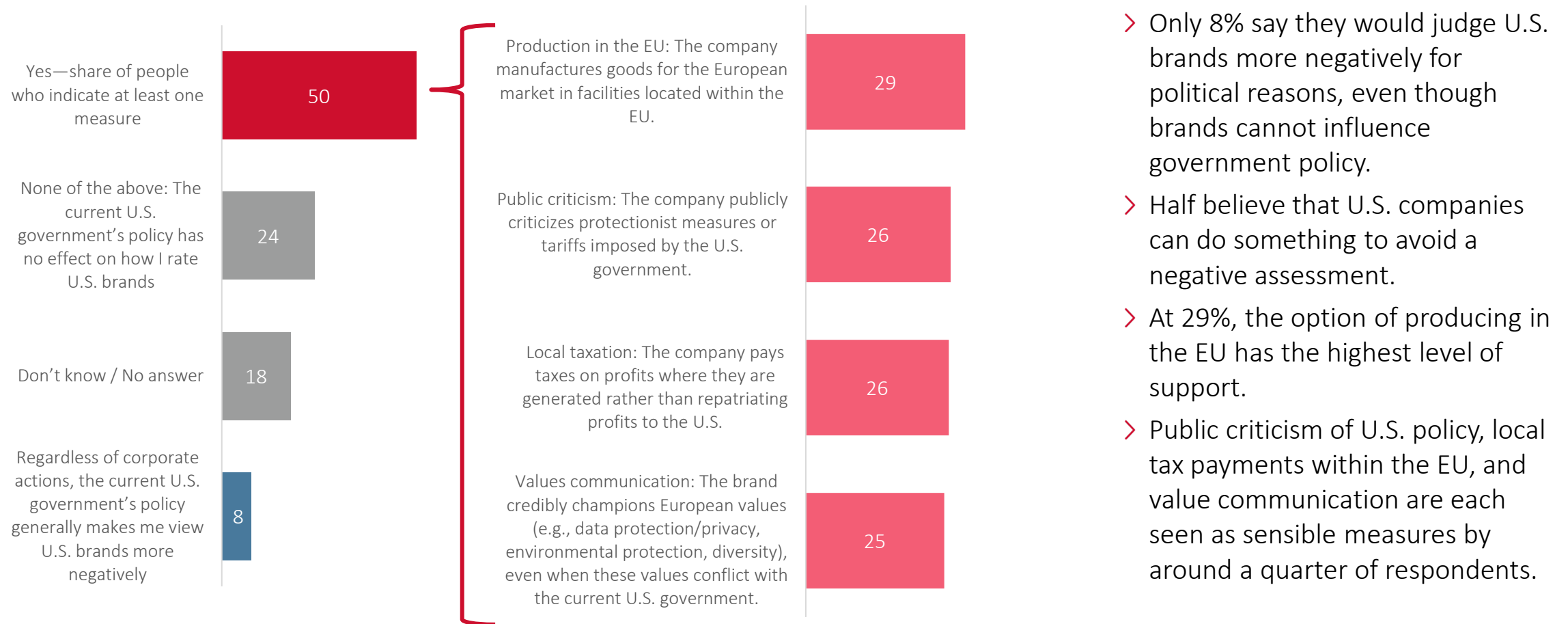
Question: Which of the following options would you like to have to help you select products and services more closely in line with your personal or political convictions?



- > Although a broad boycott of U.S. products is currently not observable, a majority of Germans would like to see better information on the origin of products and services.
- > For example, 36% would like to see a mandatory logo on packaging that clearly indicates the company's origin at a glance.
- > Around a third would like to see shelf signage (30%) or origin-related filter options in online retail (29%).
- > Meanwhile, 16% find app-based origin information appealing.

Multiple choices possible | Values in % | n = 1,006 | Survey period: 01.29.2026–02.02.2026 | NIMpulse 14 | nim.org

Question: Could companies from the U.S. do something to keep you from blaming them for the U.S. government's policies?



- > Only 8% say they would judge U.S. brands more negatively for political reasons, even though brands cannot influence government policy.
- > Half believe that U.S. companies can do something to avoid a negative assessment.
- > At 29%, the option of producing in the EU has the highest level of support.
- > Public criticism of U.S. policy, local tax payments within the EU, and value communication are each seen as sensible measures by around a quarter of respondents.

Multiple choices possible | Values in % | n = 1,006 | Survey period: 01.29.2026–02.02.2026 | NIMpulse 14 | nim.org

PD Dr. Katharina Gangl

Director of Studies at the NIM

Our survey shows: U.S. government policies have a negative impact on the perception of U.S. brands in Germany. A majority also think that their own consumer behavior can have a political impact on the policies of the U.S. government.

However, there is currently no sign of a broad boycott movement. One reason for this is the fact that many U.S. brands are seen as difficult to replace, especially the big tech companies. Older respondents are more likely to act on their attitudes by avoiding brands, whereas younger respondents tend to voice criticism rather than abstain from purchasing U.S. products.

Car manufacturers and traditional consumer goods such as Levi's are most likely to be the focus of boycotts. Tesla plays a special role, presumably because Elon Musk is also personally associated with U.S. politics. However, a majority of Germans also believe that U.S. brands have the opportunity to distance themselves from U.S. politics.

At the same time, the easier a U.S. brand appears to be to replace, the greater the opportunities for European providers. To better identify such providers, consumers want information on origin, preferably directly on the product. If European suppliers can also offer comparable services, there is an opportunity to promote value creation within the EU.



Concept and questionnaire

Nuremberg Institute for Market Decisions

Survey and panel

NIQ eBUS®



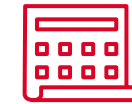
Sample

1,006 men and women aged 18 to 74, representative of the German-speaking resident population of this age group.



Scope

6 questions

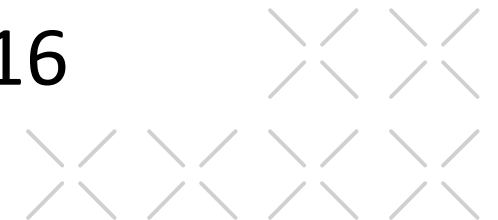


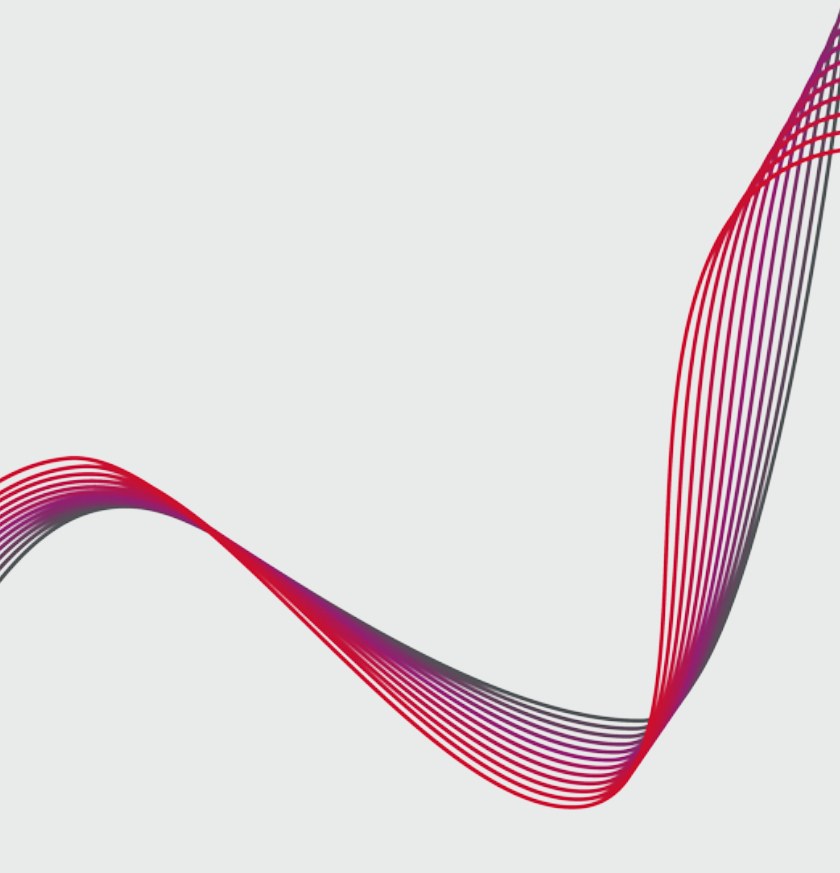
Period of the survey

01.29.2026–
02.02.2026

Number of demographic characteristics

16





Appendix

Information on the values shown on page 7: U.S. brands by perceived replaceability and willingness to restrict use for political reasons.

Reading Guide:

X-axis: Perceived replaceability by European providers

Positions to the left indicate that respondents consider the product/service easy to replace with a European provider; positions to the right indicate it is difficult to replace. The background areas reflect mean ranges: red: $M < 2.17$; purple: $2.45 \leq M \leq 3.24$; blue: around $M = 3.39$.

Y-axis: Willingness to restrict use for political reasons

Positions higher up indicate a greater willingness to restrict usage; positions lower down indicate little to no willingness to restrict. In our data, the displayed means range from $M = 3.34$ (Microsoft) to $M = 3.04$ (ChatGPT). Responses marked “Don’t know/Don’t use the product or service” were excluded from the mean calculations.

Note:

- > The values on the X- and Y-axes are the averages of the answers to two questions.
 - > X-axis: First, you will see a list of companies or brands from the U.S. How easy would it be for you to replace each product or service with a provider/brand from Europe?
 - > Y-Axis: Next, please indicate whether you would want to restrict the products or services of the provider/brand for political reasons.
- > Respondents were allowed to indicate their preference on a 4-point scale. The end points were
 - > 1 = It would be very difficult for me to replace the product/service with a provider from Europe
 - > 4 = It would be very easy for me to replace the product/service with a provider from Europeor
 - > 1 = I would like to restrict use for political reasons
 - > 4 = I would not want to restrict use for political reasons
- > For both questions, respondents could choose “Don’t know/Don’t use the product/service.” These responses were excluded when calculating means.

About NIMpulse:

In the NIMpulse study series, NIM examines the relationships between attitudes, habits, and purchasing decisions among consumers. Methodologically, the studies are based on representative surveys in Germany and other countries. The focus is on the voice of the consumer and their opinions on current consumption-related topics.

Access to the publications in the series: <https://www.nim.org/en/studies/nimpulse>

Contact:

Tobias Biró

Head of Research Communication

Phone: +49 911 951519-98

Email: tobias.biro@nim.org

www.nim.org

