

Food affordability survey - Civil Society Organisations

Fields marked with * are mandatory.

Study on Food Affordability in the EU including the contribution of the Common Agricultural Policy

Disclaimer:

The survey is available in multiple languages. You can change the language using the dropdown menu in the top right corner. Please note that all translations are automatically generated by the system and may not be fully accurate. The official version of the survey is in English.

Introduction

You are invited to take part in this survey, which is part of a study on “**Food affordability in the European Union including the contribution of the Common Agricultural Policy**”. The study is commissioned by the European Commission (DG AGRI) and aims to gather insights from authorities, economic operators across the food system, civil society organisations and research & academia.

You can find the letter of support from DG AGRI in the background documents section in the right-handed menu, translated in several EU languages. Please note that all translations are automatically generated and may not be fully accurate. The official version of the support letter is in English.

The **objectives** of the study are to assess:

- the current situation with respect to food affordability in the EU-27,
- the Common Agricultural Policy’s contribution to food prices and food affordability,
- the different policies and measures supporting food affordability including EU trade policy (and social policies, tax measures, anti-inflation measures including private initiatives and food banks) and assess the interplay and coherence between these policies and measures,
- as well as assess the possible drivers affecting food affordability (including possible impacts from and on the food supply chain, food environments, climate change, health crises, the geopolitical context, trade and enlargement).

The **geographical scope** of the survey is the EU-27, and the **main themes** covered in this survey are:

- The assessment of the current status of food affordability.
- The role of the CAP in shaping food prices.
- The assessment of EU public measures on food affordability.
- The identification and assessment of national public measures on food affordability.
- The identification of private initiatives in the EU-27.
- The interaction and coherence of public measures across levels and actors.
- Future drivers likely to influence food affordability by 2035.

At the end, we also ask about your potential interest in participating in additional consultation activities, which will complement the survey by collecting more detailed perspectives.

The survey should take approximately **35-40 minutes** to complete. Your responses will be treated with strict confidentiality and analysed only in aggregate form.

We adhere to the European Commission's Privacy Statement. For more details, please refer to the background document available in English in the right-hand menu.

I have read and agree to the privacy statement.

Thank you very much for your valuable time and input.

1 Identification questions

* Name of your organisation/association

Please provide full official name and acronym (if any):

EuroHealthNet

* Level of operation (*Please select one*):

- International
- EU-wide
- National
- Regional
- Local

* Please indicate all the Member State(s) where your organisation/association is primarily active:

Austria

- Belgium
- Bulgaria
- Croatia
- Cyprus
- Czechia
- Denmark
- Estonia
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Latvia
- Lithuania
- Luxembourg
- Malta
- Netherlands
- Poland
- Portugal
- Romania
- Slovakia
- Slovenia
- Spain
- Sweden
- All EU-27 Member States

* Main area of activity of your organisation/association (Please select one):

- Consumer rights & protection
- Poverty reduction & social inclusion
- Food banks & food aid
- Environmental advocacy
- Food policy & advocacy
- Charitable / humanitarian support
- Other (*Please specify*):

* *Please specify:*

Public health

2 Assessment of current status of food affordability

In this section we would like to analyse the current situation in the EU regarding food affordability. Which households are struggling with food supply? And what are the main reasons why households don't have enough money to buy food?

- * The UN Food and Agricultural Organisation (FAO) and the World Bank use the following definition for food affordability "The extent to which people have the economic means to acquire a diet that meets their nutritional needs and food preferences for an active and healthy life, based on prevailing food prices, income levels and required expenditures for non-food items (for example housing, energy and transport)."

In your view, is this definition clear and comprehensive?

- Yes
- No

- * Do you perceive an increase in the number of people for whom food affordability is a problem since 2015?

- Strong decrease
- Slight decrease
- No change
- Slight increase
- Strong increase
- I don't know

- * Do you notice a change in the groups in society for whom food affordability is a problem?

- Yes
- No

Please elaborate for which groups (for example certain type of household, etc)

Food affordability problems are now spreading beyond the "traditional" lowest-income groups, people in extreme or relative poverty, onto wider segments of the population. Households officially above the poverty line – especially low-wage "working poor" households, single parents, large families and families with young children, and renters in high-cost cities – are increasingly forced to cut back on healthy quality food as they juggle rising costs of housing, energy and transport. We also see growing pressure on people in disadvantaged situations for reasons other than income: migrants and ethnic minorities, persons with disabilities or chronic illness, young people, pensioners. Regionally, this is particularly visible in poorer regions in Eastern and Southern Europe, remote rural areas and deprived urban neighbourhoods across the EU, where higher living costs and weaker local services mean that even modest food price increases quickly translate into reduced quantity and quality of diet - with negative health and social consequences.

3 Assessment of past drivers affecting food unaffordability

In this section we would like to analyse the drivers that influence food affordability and its evolution over the past decades.

On a relevance scale ranging from 1 (least relevant) to 5 (highly relevant), how relevant are the following factors as drivers of food unaffordability?

Drivers	1	2	3	4	5	I don't know
* Income/wages do not keep up with rise in prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Increasing consumer food prices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
* Increasing costs for non-food essentials (in general)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
* Increasing costs for non-food essentials, in particular, cost of housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
* Increasing costs for non-food essentials, in particular, health care	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Increasing costs for non-food essentials, in particular, insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
* Increasing costs for non-food essentials, in particular, energy costs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
* Increasing costs for non-food essentials, in particular, cost of transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Increasing costs for other non-food essentials (<i>Please specify below</i>)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

* Please specify:

Insufficient / poorly indexed social benefits - Minimum income schemes, child benefits and pensions often do not keep pace with inflation, so real support falls while prices rise; Precarious and unstable employment - Zero-hour contracts, platform work and seasonal jobs create unstable monthly income, making it harder to plan and prioritise food spending; Childcare and education-related costs - Rising costs for childcare, school materials, extracurricular activities and transport squeeze household budgets and disposable incomes, especially for families with children.

* In your view, how significant is the impact of shrinkflation (when the size or quantity of a product is reduced while the price remains the same or increases) on food affordability for consumers in your country?

- Very significant – it substantially reduces affordability
- Somewhat significant – it contributes to affordability challenges
- Limited impact – affects only certain products or consumers
- No noticeable impact
- I don't know

- * In your view, how significant is the impact of greedflation (when companies increase prices beyond their rising costs, often during periods of high inflation) on food affordability in your country?
 - Very significant – it substantially reduces affordability
 - Somewhat significant – it contributes to affordability challenges
 - Limited impact – affects only certain products or consumers
 - No noticeable impact
 - I don't know

4 Identification and assessment of CAP instruments

In this section, we aim to assess the role of specific instruments of the Common Agricultural Policy (CAP) in increasing food affordability across different consumer groups in the EU.

- * How familiar are you/is your organisation with the role of the EU's Common Agricultural Policy (CAP) in influencing food prices and affordability?
 - Very familiar – we actively follow or work on CAP-related issues
 - Somewhat familiar – we are aware of CAP's role but not deeply involved
 - Heard of the CAP but not familiar with its impact on prices
 - Not familiar with this topic

- * In your/your organisation's view, how does the CAP currently affect food prices in the EU?
 - It helps stabilise prices and improve affordability
 - It has little effect on overall food prices
 - It contributes to higher food prices for consumers
 - Its impact varies significantly by sector or region
 - I don't know / I have no opinion

On a relevance scale ranging from 1 (least relevant) to 5 (highly relevant), how relevant do you think the following instruments of the CAP have been in improving food affordability and access to food in the country /countries where your organisation is primarily active?

CAP Policy instrument	1	2	3	4	5	Not relevant	I don't know
* Income support to farmers (direct payments to assist them in producing safe, healthy and affordable food)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* EU school fruit, vegetables and milk scheme (supporting children's access to nutritious foods)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
*							

Rural development programmes (e.g., investments in short supply chains, local markets, or small-scale production)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Market safety net measures (e.g., intervention buying, private storage aid, crisis reserves)	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Environmental and climate-related measures (e.g., eco-schemes, agri-environmental payments)	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (<i>Please specify below</i>)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

* *Please specify:*

CAP income support can also have perverse effects on food affordability and diet quality. Historically, a large share (80%) of subsidies has gone to the biggest (20%) landholders and has incentivised meat and dairy and feed production rather than healthy, plant-rich foods. Over 80% of EU farming subsidies support emissions-intensive animal products, while lower-impact foods like fruits, vegetables and nuts remain relatively more expensive than they would be with equal support. At the same time, data from WHO, OECD and EU sources confirm that healthy, minimally processed foods remain relatively more expensive per calorie than refined products and many animal-source foods, and that a healthy diet is still unaffordable for a significant share of low-income households in several Member States. That is why targeted fiscal and social measures outside CAP (e.g. reduced VAT on healthy, minimally processed foods; increased minimum income and child benefits) - when introduced - for example as a crisis-buffer measure, have been more directly effective in improving food affordability for low-income households.

* To what extent does the current CAP ensure that supplies reach consumers at reasonable prices as defined by Article 39.1 in the Treaty of the Functioning on the European Union.

- Very well – CAP effectively supports affordable and fair food prices
- Somewhat well – it contributes but not as a primary objective
- Poorly – its benefits do not reach consumers effectively
- Not at all – CAP primarily serves producer interests
- I don't know / I have no opinion

* Which policy directions should be prioritised to make the CAP contribute more effectively to fair and affordable food prices?

Maximum 2 selection(s)

- Stronger support for small farms
- Less support for small farms
- Reducing on-farm environmental, animal and welfare measures
- Increasing on-farm environmental, animal and welfare measures
- Measures to reduce input costs
- Measures to reduce market volatility
- Improved transparency in the food supply chain
- Linking subsidies to consumer price outcomes
- No change needed – the current CAP is adequate

Other (Please specify)

- * In your view, do the effects of the CAP on food prices vary significantly between product-specific sectors?
- Yes, there are major differences between sectors/products
 - Some differences exist, but they are not significant
 - No, the CAP's effects are fairly uniform across different sectors
 - I don't know / I have no opinion

5 Identification and assessment of EU public measures

In this section, we would like to assess the measures in place to support the affordability of food at EU level. These may include social protection and food assistance measures, fiscal measures, public procurement programs, crisis-response initiatives, or other relevant actions.

Based on your observations or experience, how effective have the following EU measures been in improving the affordability of a healthy diet?

(1 - Very ineffective: EU measures have little to no effect, or unintended negative consequences; 5- Very effective: EU measures clearly improve the affordability of a healthy diet)

	1	2	3	4	5	I don't know
* Regulation (EU) 2021/1057 of the European Parliament and of the Council of 24 June 2021 establishing the European Social Fund Plus (ESF+) and more specifically Article 4 (m): <i>“addressing material deprivation through food and/or basic material assistance to the most deprived persons, including children, and providing accompanying measures supporting their social inclusion”</i>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Directive 2006/112/EC: On the common system of value added tax (VAT), allowing Member States to apply reduced VAT rates to certain goods and services, including food.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement, framing public procurement at EU level	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
* Regulation (EU) 2020/2221 of the European Parliament and of the Council of 23 December 2020 amending Regulation (EU) No 1303/2013 as regards additional resources and implementing arrangements to provide assistance for fostering	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

crisis repair in the context of the COVID-19 pandemic and its social consequences and for preparing a green, digital and resilient recovery of the economy (REACT-EU)						
* Other EU directives or regulations (<i>Please specify below</i>)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

* *Please specify which other EU directives or regulations:*

Council Recommendation (EU) 2021/1004 of 14 June 2021 establishing a European Child Guarantee, in particular point 4(a)–(b) and section 9 “Healthy nutrition”, calling on Member States to guarantee children in need free access to at least one healthy meal each school day and effective access to healthy nutrition. and: Regulation (EU) 2016/791 of the European Parliament and of the Council of 11 May 2016 amending Regulations (EU) No 1308/2013 and (EU) No 1306/2013 as regards aid for the supply of fruit and vegetables, bananas and milk in educational establishments (“EU school fruit, vegetables and milk scheme”). and: Regulation (EU) No 1144/2014 of the European Parliament and of the Council of 22 October 2014 on information provision and promotion measures concerning agricultural products implemented in the internal market and in third countries.

Please briefly justify your answers:

Council Recommendation (EU) 2021/1004 of 14 June 2021 establishing a European Child Guarantee, in particular point 4(a)–(b) and section 9 “Healthy nutrition”, calling on Member States to guarantee children in need free access to at least one healthy meal each school day and effective access to healthy nutrition. Although it does not regulate food systems or CAP directly, it creates a clear demand-side obligation to provide healthy meals and diets for children in vulnerable situations. This in turn should be supported by supply-side measures under the CAP and food-system policies – for example through the EU school fruit, vegetables and milk scheme, short supply chains and local procurement – to ensure that affordable, nutritious foods are available to fulfil the Child Guarantee commitments. The EU school fruit, vegetables and milk scheme = This scheme, financed under the CAP, supports the provision of free or subsidised fruit, vegetables and milk in schools, often with accompanying educational measures. It directly improves access to healthy foods for children, particularly those from low-income families, and can help Member States implement the European Child Guarantee obligations on healthy nutrition. It also links demand for healthier products with agricultural production and local supply chains, making it a key bridge between food systems/CAP and child nutrition and poverty reduction objectives. The EU Agri promotional policy - this regulation is highly relevant because it determines which foods and messages are actively promoted with EU money. By prioritising certain products and campaigns, it can either support a shift towards healthier, more plant-rich, sustainable diets (e.g. fruit, vegetables, legumes, wholegrains) or reinforce consumption of products that contribute to diet-related NCDs. Aligning agri-promotion programmes under Regulation 1144/2014 with nutrition guidelines, the Farm to Fork Strategy and affordability goals would help make healthy, sustainable foods more visible, desirable and accessible, especially if promotion focuses on products that can be provided at affordable prices for low-income groups rather than on highly processed or high-fat, high-sugar products.

6 Identification and assessment of national public measures

In this section, we would like to identify the measures in place to support the affordability of food in your country, region or municipality. These may include food assistance measures, fiscal measures, public

procurement programs, crisis-response initiatives, or other relevant actions.

Please select all options that apply, based on your knowledge or observations.

* Food assistance measures

(Measures that directly reduce the cost of food for households or provide food support)

- Cash transfers or allowances for food – Direct financial support provided to households specifically to help cover the cost of food
- Food vouchers – Vouchers or cards that can be exchanged for food at participating shops or markets
- Support for food banks or in-kind assistance – Provision of food directly to individuals or families through food banks, charity programs, community kitchens, or distribution of food parcels.
- Other (*Please specify*)
- None of the above - You are not aware of any such measures being implemented in your country

* Fiscal measures

(Measures that influence food prices through taxation, subsidies, ...)

- VAT reductions or exemptions on essential/healthy foods – Reduced or zero-value-added tax on staple or nutritious foods to lower their retail price
- Excise taxes or levies (e.g. on unhealthy foods) – Taxes applied to foods high in sugar, salt, or fat
- Targeted subsidies for healthy or staple foods – Financial support provided to consumers to reduce the price of healthy or essential foods
- Price controls or ceilings on essential items – Government-mandated maximum prices on selected foods
- Tax incentives for food donations – Fiscal benefits granted to businesses or individuals that donate food to charities or food banks
- Other (*Please specify*)
- None of the above – You are not aware of any such measures being implemented in your country

* Public procurement measures

(Measures using public purchasing to improve affordability and nutrition)

- Free or subsidised meals in schools – Provision of meals at no cost or reduced cost to children in schools, implemented under publicly funded programs (e.g. the EU school fruit, vegetables and milk scheme)
- Meals in hospitals or elderly care facilities – Provision of affordable or free meals for patients, residents, or clients in healthcare or long-term care facilities
- Public catering for vulnerable groups – Initiatives where public institutions provide meals or food access programs targeted at disadvantaged populations outside schools, hospitals or care facilities
- Other (*Please specify*)
- None of the above – You are not aware of any such measures being implemented in your country

* Emergency food assistance measures

(Measures to mitigate sudden affordability shocks, e.g. due to economic crises, disasters or other emergencies)

-

Temporary price freezes or caps on the price of essential foods – Government-mandated limits on the prices of selected foods during crises

- Emergency food assistance schemes – Short-term programs providing food parcels, meals, or other direct food aid to households affected by crisis
- Mobilisation of strategic food reserves – Release of government-held food stocks to stabilize supply and prices during crises
- Rapid-response vouchers or transfers to vulnerable households – Quick distribution of cash, vouchers, or digital support to help households access essential food in crisis
- Other (*Please specify*)
- None of the above – You are not aware of any such measures being implemented in your country

Are there any other types of policies, programs, or initiatives in your country/region that directly affect food affordability, but have not been mentioned above? If so, please describe them briefly

7 Identification and assessment of private initiatives

In this section, we would like to collect information on any initiatives your organisation has implemented to improve food affordability. This may include actions such as influencing food prices, providing targeted financial support, or offering in-kind food assistance. **Please provide information for only one initiative /programme in this section.**

- * Has your organisation ever implemented any measures to improve food affordability for consumers?

This can include food parcel distribution, free or low-cost meals, social supermarkets, voucher schemes, awareness or outreach activities.

- Yes
- No

8 Assessment of the interaction of measures

In this section, we are interested in how food affordability measures interact across governance levels (EU, national, regional/local) and policy sectors (e.g., health and nutrition, fiscal, social policy, education). In particular, we want to understand how well these measures are coordinated, whether their objectives are aligned, and how effectively they reach the intended populations.

- * Overall, how would you describe **the interaction between different food affordability measures** in your country/region?

Consider coordination across levels (EU → national → regional/local → private/NGOs) and across sectors.

- Very well aligned – clear roles, coordinated actions, and shared frameworks across levels and sectors
-

Moderately aligned – some coordination exists, but measures often operate in parallel

- Poorly aligned – little coordination; measures mostly operate independently
- I don't know

* To what extent do different food affordability measures (EU, national, local, private, NGO and or between sectors) **pursue the same objectives**, with improving the affordability of a healthy diet as a shared priority?

- Very well aligned – objectives are consistent, mutually supportive, and clearly reinforce the goal of improving the affordability of a healthy diet
- Moderately aligned – most objectives support the objective of improving the affordability of a healthy diet, but some inconsistencies or competing priorities exist
- Poorly aligned – objectives are contradictory or do not clearly support the goal of improving the affordability of a healthy diet
- I don't know

* Based on your experience, how well do existing food affordability measures **reach the intended populations and regions**? Do you observe any imbalances in coverage or resource allocation?

- Well-targeted – measures reach the right populations and regions effectively
- Some gaps – certain populations or regions are underserved
- Some overlap – some populations or regions receive overlapping support
- Both gaps and overlaps – a mix of under- and over-coverage
- I don't know

In your view, how could coordination and interaction between food affordability measures—across levels and sectors—be improved to enhance synergies, reduce trade-offs, and better support the goal of making healthy diets more affordable?

You may also comment on gaps, overlaps, or examples of good practice.

Coordination could be significantly improved by aligning objectives and sequencing measures across health, social, agricultural, fiscal and education policies, rather than treating food affordability as a series of isolated interventions. In practical terms, this means agreeing a shared national/European goal of making healthy, minimally processed foods the easiest and most affordable choice, and then coordinating concrete tools around that.

Priority areas where coherence and joint implementation would make a real difference include:

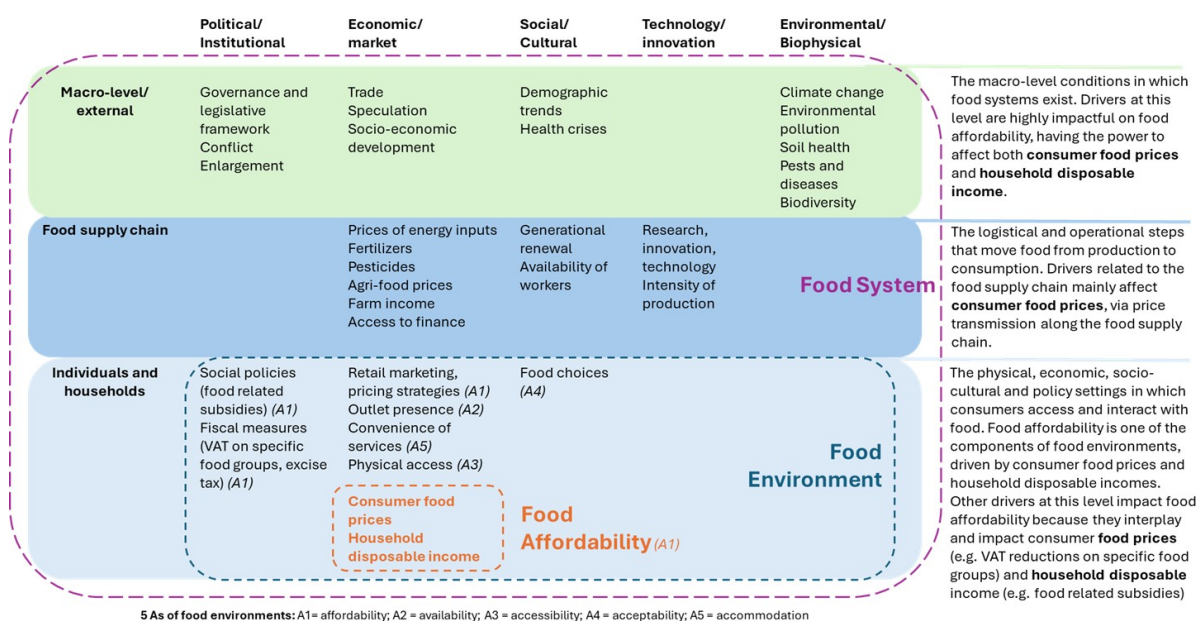
- Fiscal measures: coordinated action by finance, health and social ministries to eliminate or sharply reduce VAT on fruits, vegetables, wholegrains and pulses, and to increase taxes on unhealthy products, especially ultra-processed foods and those high in sugar, salt and saturated fat – with revenues earmarked for prevention and social measures.
- Healthy school food as a universal lever: education, health, agriculture and local authorities working together to provide universal healthy and sustainable school meals for all primary and secondary pupils, with procurement that favours local and regional suppliers and sets clear nutrition and sustainability standards.
- Joined-up social and agricultural policy: systematically linking income support, minimum income schemes and child benefits with food and nutrition measures, and aligning CAP and food system instruments (e.g. EU school scheme, short supply chains, local markets) so that they support the affordability of healthy foods, not only production volumes.
- Current gaps include fragmented governance (different ministries pursuing conflicting objectives) and weak

integration between fiscal, social and food-system measures, which can dilute impact and create trade-offs. Good practice can be seen where countries have national food or nutrition strategies with explicit governance structures that bring health, agriculture, social affairs, finance and education around one table to design, cost and monitor a coherent package of measures.

9 Identification of future drivers of food affordability

Food affordability is mainly determined by consumer food prices and household disposable income. Many drivers within the food system—where food is produced and consumed—can influence consumer food prices and household disposable income, and consequently affect food affordability. These drivers operate at different levels (macro, supply chain, or food environment), within specific categories (e.g., economic /market, technology/innovation), and can impact one or both of these components.

The visual below illustrates the levels at which these drivers operate within the food system and the mechanisms through which they affect food affordability (via consumer food prices or household disposable income).



Click here to download the visual:

[Food affordability - Visual of drivers.jpg](#)

Macro-level drivers (e.g., war, health crises, climate change) can be highly disruptive and significantly impact food affordability. At this level, we aim to assess how such drivers might influence food prices by disrupting food supply chains, ultimately affecting consumers.

Supply chain drivers (e.g., input prices, innovative production techniques, supply chain length) influence the efficiency and effectiveness with which healthy and nutritious food moves from production to the final consumer, as well as the resulting consumer food prices. At this level, we aim to assess how these drivers are likely to affect food prices at different stages of the supply chain and, ultimately, the final consumer price.

Food affordability is one of five components of **food environments**, alongside:

1. **Availability** - whether food is physically present in sufficient quantity and variety
2. **Accessibility** – whether people can actually reach and obtain food
3. **Acceptability** – whether the available food meets cultural, social, and personal preferences
4. **Accommodation** – whether the food environment adapts to people's needs and constraints

At this level, we also assess if, and how, drivers associated with the other four components (availability, accessibility, acceptability, and accommodation) impact food affordability, primarily by affecting consumer food prices, but also household disposable income, in some instances.

In this context, we would like to have your views on which drivers will likely impact food affordability in the EU, over the next ten years (by 2035), through their impact on final consumer food prices and/or household disposable income. We will start with drivers at the broader scale (macro-level) and move down to the smaller scale with drivers at the food environments level.

9.1 Macro level

Below you can find types of drivers typically classified as **political and institutional drivers**, that act at the **macro-level**. Select the drivers you consider most relevant for food affordability in the EU over the next ten years (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (Please specify)". If you are unsure, please select only "I don't know".

- EU enlargement (new countries join the EU)
- Geopolitical instability and conflict
- Other (Please specify)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Geopolitical instability and conflict	* <input data-bbox="387 288 613 357" type="text" value="Moderate increase"/>	* <input data-bbox="757 288 983 357" type="text" value="Moderate increase"/>	trade wars and conflict affect supply/demand, including greedflation and profiteering from food supply shortages

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Other (<i>Please specify in the last column</i>)	* <input type="text" value="High increase"/>	* <input type="text" value="Moderate increase"/>	corporate/regulatory capture that skew food system policies for the benefit of a small number of powerful corporate actors at the expense of both people and planet

Below you can find types of drivers typically classified as **economic and market drivers**, that act at the **macro-level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Trade disruptions
- New trade agreements
- Financial speculation in food commodity markets
- Single Market barriers (e.g. territorial supply constraints, fragmented rules on packaging labelling and waste)
- Energy supply and prices
- Labour (availability, cost)
- Market concentration and unfair competition
- Macroeconomic trends (inflation, recessions)
- Economic growth
- Socio-economic development
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Trade disruptions	* Moderate increase	* I don't know	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
New trade agreements	* Moderate decrease	* I don't know	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Financial speculation in food commodity markets	* Moderate increase	* Moderate increase	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Energy supply and prices	* High increase	* Moderate increase	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Market concentration and unfair competition	* Moderate increase	* Moderate increase	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Macroeconomic trends (inflation, recessions)	* Moderate increase	* Moderate increase	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Economic growth	* Moderate increase	* I don't know	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Socio-economic development	* Moderate increase	* Moderate increase	

Below you can find types of drivers typically classified as **demographic drivers**, that act at the **macro-level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Migration flows
- Urbanisation and rural depopulation
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Urbanisation and rural depopulation	* High increase	* High increase	

Below you can find types of drivers typically classified as **technology and innovation drivers**, that act at the **macro-level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Global agricultural technology diffusion
- Research and development
- Alternative proteins
- Public infrastructure
- Digitalisation of trade and retail
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Alternative proteins	* Moderate decrease	* No impact	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Public infrastructure	* Moderate decrease	* Moderate increase	

Below you can find types of drivers typically classified as **environmental and biophysical drivers**, that act at the **macro-level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Climate change
- Environmental pollution
- Soil health
- Pests and diseases
- Global health crisis or pandemics
- Biodiversity levels
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Climate change	* High increase	* High increase	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Soil health	* Moderate increase	* Moderate increase	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Global health crisis or pandemics	* High increase	* High increase	

Below you can find types of drivers typically classified as **socio-cultural drivers**, that act at the **macro-level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Consumer preferences and food choices
- Health, nutrition, and dietary changes
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of Impact on food prices	Magnitude and direction of Impact on household disposable income	Please briefly justify your answers
Consumer preferences and food choices	* Moderate increase	* I don't know	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Health, nutrition, and dietary changes	* Moderate increase	* I don't know	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Other (<i>Please specify in the last column</i>)	* <input type="text" value="I don't know"/>	* <input type="text" value="Moderate increase"/>	social inequalities in health have negative impacts on household incomes that could be spent on food/healthy diets via employment/unemployment, disability limiting employment activities, higher out of pocket spendings on medicines, care and not on food

9.2 Food environment level

Below you can find types of drivers typically classified as **political and institutional drivers**, that act at the **food environment level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Marketing and shelving restrictions
- Fiscal measures on certain food items
- Increased labelling regulations
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Marketing and shelving restrictions	* <input type="text" value="Moderate decrease"/>	* <input type="text" value="No impact"/>	tougher marketing rules may reduce very aggressive price promotions on unhealthy products, but that is more about price dispersion and promotions than about the underlying price level of food

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Fiscal measures on certain food items	* Moderate increase	* Moderate decrease	mixed depending on fiscal measures put on either healthy or unhealthy food products: fiscal tools are among the most powerful levers governments have to influence food prices and relative affordability.

Below you can find types of drivers typically classified as **economic and market drivers**, that act at the **food environment level**. Select the drivers you consider most relevant for food affordability in the EU over the next ten years (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- More diverse retail pricing strategies
- Market concentration at retail level
- Higher convenience of services for different dietary needs
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Market concentration at retail level	* Moderate increase	* I don't know	

Below you can find types of drivers typically classified as **demographic drivers**, that act at the **food environment level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Marketing influence on targeted consumer segments
- Household composition changes
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Marketing influence on targeted consumer segments	* Moderate increase	* I don't know	

Below you can find types of drivers typically classified as **socio-cultural drivers**, that act at the **food environment level**. **Select the drivers you consider most relevant for food affordability in the EU over the next ten years** (through their possible effect on food prices and/or household disposable income). You can specify new drivers through "Other (*Please specify*)". If you are unsure, please select only "I don't know".

- Consumer demand shifts
- Convenience food
- Health consciousness
- Environmental consciousness
- Food waste (excess buying)
- Other (*Please specify*)
- I don't know

For each of the drivers you selected as relevant in the question above, please indicate what you think will be the magnitude and direction of its impact on food prices and on household disposable income (if any) (and consequently on food affordability), in the EU, in the next ten years. Please also provide a brief explanation of your answer in the third column (consider, for example, geographical differences in this impact – e.g., northern vs. southern Europe, rural vs. urban – or different impacts on different population groups).

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Health consciousness	* <input data-bbox="369 279 526 338" type="text" value="I don't know"/>	* <input data-bbox="900 279 1057 338" type="text" value="I don't know"/>	

Driver	Magnitude and direction of impact on food prices	Magnitude and direction of impact on household disposable income	Please briefly justify your answers
Environmental consciousness	* <input data-bbox="436 279 586 341" type="text" value="I don't know"/>	* <input data-bbox="945 279 1095 341" type="text" value="I don't know"/>	

10 Closing questions

As part of this study, we are also conducting **in-depth interviews** and **hybrid focus groups** to gather more detailed insights into food affordability policies and practices.

* Would you be interested in participating in further consultation activities in the context of this study?

- Yes
 No

If your organisation has a relevant position paper, report, or policy document on food affordability that you would like to share, please upload it here:

Is there anything else you would like to share with us about food affordability in the EU, or your organisation's experiences that has not been covered in this survey?

The Lancet Planetary Health (October 2025): Affordability and nutritional challenges for the future of EAT diets: an economic modelling analysis; <https://www.thelancet.com/journals/lanph/article/PIIS2542-5196%2825%2900203-7/fulltext>;

The Lancet (November 2025): Towards unified global action on ultra-processed foods: understanding commercial determinants, countering corporate power, and mobilising a public health response; <https://www.thelancet.com/journals/lancet/article/PIIS0140-6736%2825%2901567-3/abstract>;

The Lancet-EAT Commission (October 2025): The EAT-Lancet Commission on healthy, sustainable, and just food systems; <https://www.thelancet.com/journals/lancet/article/PIIS0140-6736%2825%2901201-2/abstract>;

EuroHealthNet (2025): Tackling ultra-processed food for a healthier and just food system: https://eurohealthnet.eu/wp-content/uploads/publications/2025/2411_eurohealthnet-policy-precis-upf.pdf

Background Documents

[Letter of Support BG.pdf](#)

[Letter of Support DA.pdf](#)

[Letter of Support DE.pdf](#)

[Letter of Support EL.pdf](#)

[Letter of Support EN.pdf](#)

[Letter of Support ES.pdf](#)

[Letter of Support ET.pdf](#)

[Letter of Support FI.pdf](#)

[Letter of Support FR.pdf](#)

[Letter of Support HR.pdf](#)

[Letter of Support HU.pdf](#)

[Letter_of_Support_IT.pdf](#)

[Letter_of_Support_LT.pdf](#)

[Letter_of_Support_LV.pdf](#)

[Letter_of_Support_MT.pdf](#)

[Letter_of_Support_NL.pdf](#)

[Letter_of_Support_PL.pdf](#)

[Letter_of_Support_PT.pdf](#)

[Letter_of_Support_RO.pdf](#)

[Letter_of_Support_SK.pdf](#)

[Letter_of_Support_SL.pdf](#)

[Letter_of_Support_SV.pdf](#)

[Privacy_Statement_Targeted_consultations_Consortium_Food_Affordability_Study.pdf](#)

Contact

[Contact Form](#)