

State of Food Security in the EU

A qualitative assessment of food supply and food security in the EU within the framework of the EFSCM

Spring 2026 – Nr 6





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In the framework of the Contingency plan for ensuring food supply and food security in times of crisis, the present report is produced twice a year. It consists of a qualitative assessment of the state of food security in the EU which is based on the inputs of the expert group on the European Food Security Crisis preparedness and response Mechanism (EFSCM). The Commission services compiled the replies received through a targeted online survey.

The survey was open between March and April 2026 and submitted to members of and observers to the expert group of the EFSCM. In total, 36 written replies were submitted (17 from Member States and regional representatives, 3 from non-EU national authorities and 16 from stakeholders' organisations) covering different stages of the food supply chain (producers, processors, input providers and representatives of the retail sector). Survey results have been complemented with input provided by the EFSCM members/observers participating to an interactive workshop held on the 18th March 2026. Given the size of the sample and the qualitative nature of the survey, the results do not provide a representative view of the expert group.

In addition to the results of the survey, the Commission prepared a targeted analysis on the topic of trade diversification and dependency. This is presented in the "Zooming into" part of the report.

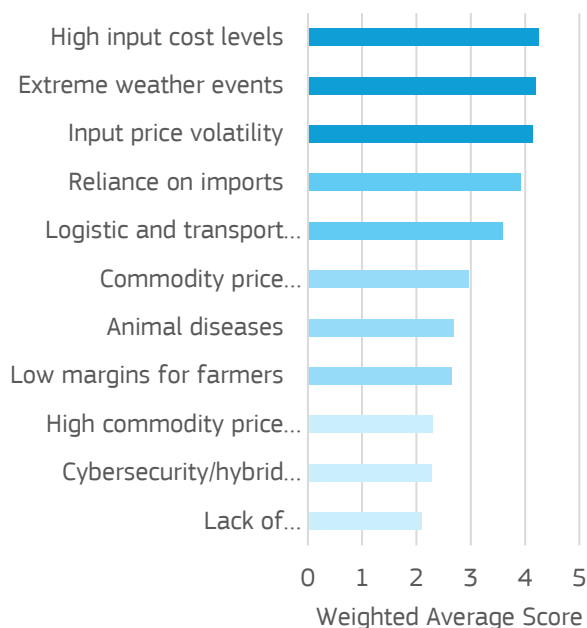
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1. State of food security in the EU

High and volatile input costs, along with extreme weather events, were perceived as the most relevant risks for EU food supply in the second half of 2025

The first section of the survey was dedicated to the assessment of the relevance of risks of food supply, defined as the physical availability of food for EU consumers. On a scale from 1 to 10, respondents perceived that the overall risk of food supply in the EU was “moderate”, with an average score of 5.4. Respondents were asked to rank a list of eleven factors that potentially affected EU food supply during the second half of 2025, from the most to the least relevant ones. The eleven factors were identified as the most significant risks for food supply in the last two qualitative assessments, in Autumn and Spring 2025. Answers to this question were analysed using weighted scoring to determine an overall ranking. Figure 1 shows the results.

Figure 1 Ranking of the most significant food supply risks for the physical availability of food for EU consumers during the second half of 2025



Source: EFSCM respondents' answers

Risks of high input costs and input price volatility, along with extreme weather events, are the ones more frequently appearing at the top of the respondents' ranking. According to respondents, prices of agricultural inputs such as fertilisers, electricity and veterinary expenses showed an upward trend in the second half of 2025, affecting their affordability. The timing of answers (March-April 2026) may have further fuelled the negative perception on input costs. The use of inputs

can decline when they are more expensive or when their market price is uncertain, resulting in lower yields and agricultural production. More frequent weather extremes (e.g., drought in southern Europe, heavy rains in Central Europe) affect crop yields and grazing, and tighten planting and harvest windows, increasing volatility of both crop and livestock production.

Reliance on imports was also considered a significant risk for food supply. Respondents see this as a structural risk in the EU, which does not only concern food, but also feed, fertilisers, spare parts of machineries and packaging. The risk of logistical and transport bottlenecks follows reliance on imports in the overall ranking. Respondents commented that food availability depends not only on production, but also on the timely movement of goods. The good functioning of transport and logistics depends also on the level of fuel and energy prices. As these costs rise, the ability of supply chain operators to collect, store, and redistribute food efficiently becomes increasingly constrained.

Do you know where to find food supply indicators?
<https://agridata.ec.europa.eu/extensions/FoodSupply/FoodSupply.html>

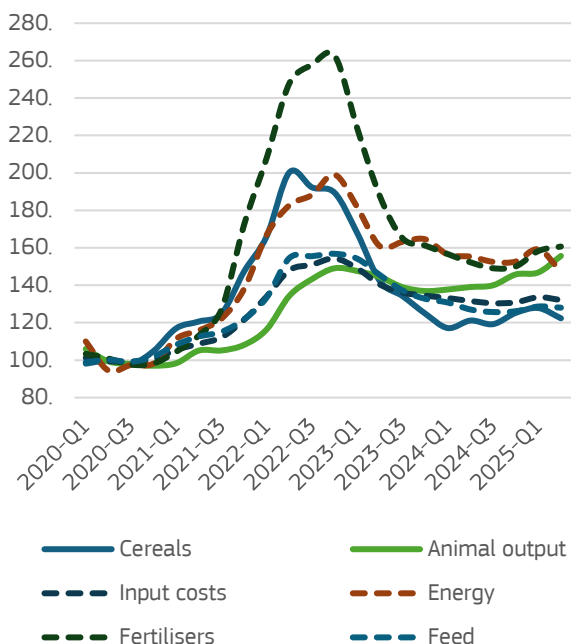
Among the survey responses, commodity price volatility appears more frequently in the middle part of the ranking. In 2025, international commodity prices were lower compared to the peak levels observed in 2022 for cereals. Meanwhile, in the livestock sector, producer prices remained relatively high. Lower cereals prices combined with increasing input costs affect farmers margins. Figure 2 aims at putting these perceptions in context by looking at the evolution of price indices for both agricultural output and input costs provided by Eurostat.

Contrary to previous assessments, the risk of animal diseases is positioned in the lower half of the ranking, showing that, with growing concerns on the costs of inputs, respondents seemed less concerned than in the past by animal diseases. Examples of recent animal diseases in the EU mentioned by respondents are Avian Influenza, African swine fever, Foot-and-mouth disease or lumpy skin disease. Outbreaks can quickly affect domestic production, constrain trade flows through additional sanitary measures and affect consumers' confidence. The measures taken on recent outbreaks seemed to have been reassuring. Concerning plant diseases, an example mentioned by respondents is the potato blight.

Risks of cybersecurity and hybrid threats were considered highly relevant by the respondents of the previous qualitative assessment in Autumn 2025. Despite these threats being positioned at the bottom of the ranking by most respondents of the present qualitative assessment, they remained one of the major risks in some Member States. Agricultural and food

production are not among the most targeted sectors of cyberattacks, despite some cases reported in dairy processing. However, cyberattacks on other sectors that supply the food value chain with services such as transport, logistics, and digital infrastructure, can have cascading effects on EU food availability.

Figure 2 Evolution of nominal prices for main agricultural output items and input costs (index 2020 = 100)



Source: Eurostat (tables *apri_pi20_outq* and *apri_pi20_inq*, extracted on 24-04-2026).

The lack of substitutes and alternatives to imports resulting in excessive dependency is the risk factor that respondents positioned at the bottom of the ranking. However, such alternative sources and strategic stocks remain an important strategy for mitigating potential vulnerabilities of the supply chain. Respondents noted concerns over limited alternatives in the plant protection sector, where managing pests and diseases has become more challenging.

Agricultural input price indices are available in the Agri-food data portal

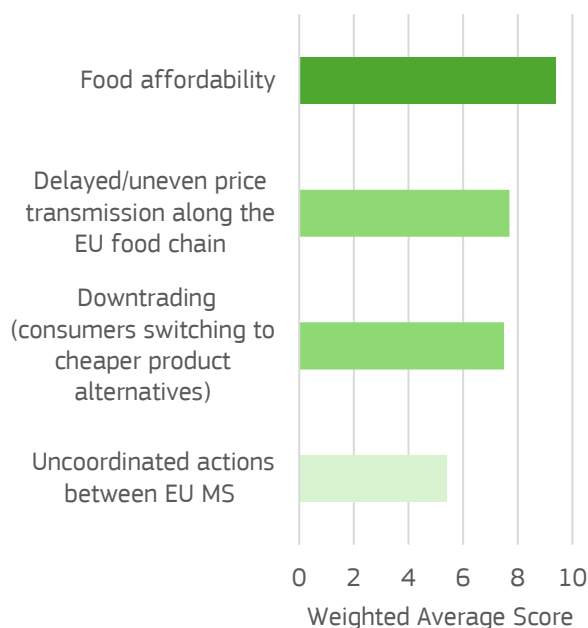
<https://agridata.ec.europa.eu/extensions/DashboardFoodChain/InputPriceIndices.html>

Food affordability tops the ranking of the most relevant risks for EU food security in the second half of 2025

The second section of the survey was dedicated to the assessment of the relevance of risks of food security, defined as the economic access to food for EU consumers. On a scale from 1 to 10, respondents perceived that the overall risk of food security in the EU was “moderate”, with an average score of 5.8. Respondents were asked to rank a list of four factors

that potentially affected EU food security during the second half of 2025, from the most to the least relevant ones. The four factors were identified as the most significant risks for food security in the last two qualitative assessments, in Autumn and Spring 2025. Figure 3 shows the overall ranking, based on weighted scoring of individual responses.

Figure 3 Ranking of the most significant food security risks for the economic affordability of food for EU consumers during the second half of 2025



Source: EFSCM respondents’ answers.

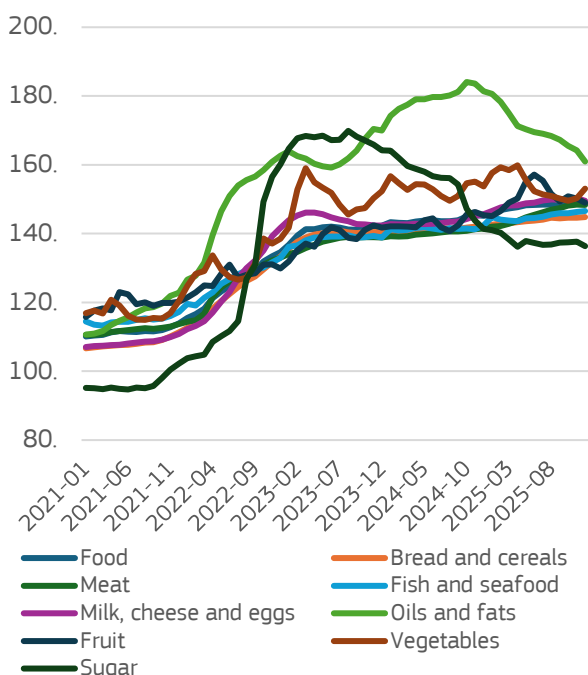
According to the respondents’ perception, food affordability was the most important risk for food security in the EU in the second half of 2025. Respondents did not consider physical absence of food as an issue, but rather the economic ability of EU households, especially low-income households, to purchase sufficient and adequate food. This was linked in previous years to food prices rising at a faster pace than general inflation, worsening food affordability.

However, recent trends indicate that price increases across most food categories have aligned with general food inflation. Figure 4 shows the latest monthly data on EU food inflation for several categories of products. Two exceptions stand out: the oils and fats sector, which has experienced deflation since its peak in October 2024, and sugar, whose prices have continued to decline since their high in August 2023.

Delayed or uneven price transmission along the food chain and downtrading are ranked by respondents as the second and third most important risks for food security in the EU, respectively. To some extent, delayed price transmission is a common phenomenon along the supply chain. It however may generate pressure on both farmers and consumers, as price increases at consumer level and input costs for farmers are disconnected. Downtrading is often a consequence of affordability

pressures, as consumers may respond by switching from full-assortment retailers to discounters, from international brands to distributors' own brands or within categories (from beef to chicken). For the lower income households whose food expenditure represent a high share of household income contributing to cost-of-living pressures, downgrading can result in switching to cheaper, lower quality alternatives or reducing diet diversity, therefore impacting the health and nutrition status of individuals. This in turn affects farmers that are relying on higher value-added products for their income.

Figure 4 Evolution of food inflation by category of items (index 2015 = 100)



Source: Eurostat (table prc_hicp_midx, extracted on 24-04-2026).

Uncoordinated actions between EU Member States resulting in single market fragmentation represent a risk factor less identified by respondents than in the past. Some respondents noted that national measures such as price caps or mandatory promotions can have unintended consequences. These may include market distortions and heightened inflation, ultimately driving up consumer prices.

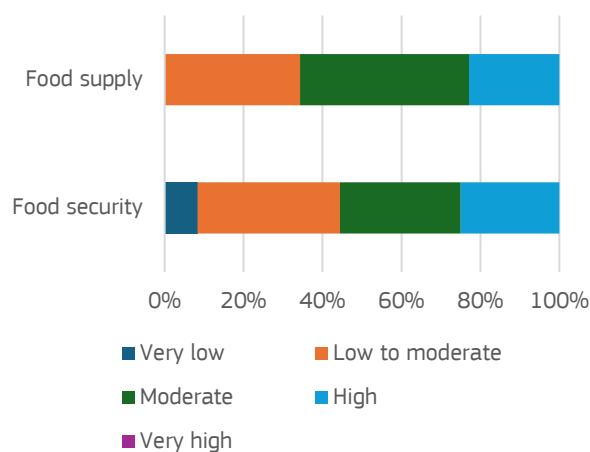
EU food supply and security seen as more vulnerable than in previous assessments

Figure 5 shows the overall risk assessment of EU food supply and security carried out by survey respondents. While a majority of them (43%) perceived the risk for EU food supply as “moderate”, 34% consider it to be “low to moderate”. Regarding food security, the majority of respondents (36%) considered that the risk in the EU is “low to moderate”, while 31% considered the risks for EU food security as “moderate”. In this context, “moderate” means that some disruptions in food supply and security can be expected and might result in limited

market disruptions, while in the “low to moderate” scenario the expectation assumes only limited disruptions that can be handled without an impact on food security.

These results correspond to a more pessimistic assessment for EU food supply and security compared to the Autumn 2025 qualitative assessment. For food supply, the majority of responses passed from “low to moderate” to “moderate” risk, while for food security the percentage of “low to moderate” risk replies decreased by 13 percentage points. For both food supply and security, the percentage of “high” risk replies increased by 21 and 20 percentage points to 23% and 25%, respectively. In this context, “high” risk means that serious disruptions in food supply and security can be expected, and even if handled, they might not be without an impact.

Figure 5 Distribution of answers assessing the risk level for EU food supply and food security in the second half of 2025



Source: EFSCM respondents' answers

Looking ahead, respondents have provided additional information on new emerging trends that could have an impact on EU food supply and food security in the upcoming year. Aside from the risks already mentioned in the report, several respondents mentioned that geopolitical and trade disruptions are potentially relevant risk factors. The continuation or the escalation of the conflict in the Middle East generates risks associated to ships rerouting, spikes in energy and fertiliser prices, and shortages of inputs and materials for which the EU is a net importer. These factors could lead to higher food prices, reduced affordability, and supply chain shortages. Respondents mentioned that mitigation actions could include diversifying suppliers, stabilising energy markets, and support access to food for low-income EU households. In addition, respondents expressed also concern with regard to future potential uncertainties linked to tariffs potentially disrupting trade flows of inputs and food products, and with regard to the continuation of Russia's war of aggression against Ukraine which could further disrupt grain and fertiliser markets.



2. Zooming into: trade diversification and dependencies in 2025

The diversification of EU trade partners is a key component of food security and the resilience of the EU food system. Monitoring the diversification of trade flows across trade partners at a detailed product level allows to screen for potential import or export dependencies. DG AGRI is regularly monitoring the state of EU trade diversification both for agri-food products and a range of key agri-food inputs. This snapshot provides an update of this work with key results for 2025.

The analysis is based on three criteria to identify potential trade dependencies for a given product: (1) the trade balance of the EU, (2) the concentration of EU imports or exports, and (3) the concentration of world supply (exports) or demand (imports). The EU is considered to have a potential import dependency (conversely export dependency) for a product if it is a net importer of this product, if its imports are highly concentrated on few partners, and if World exports are also concentrated (indicating that there are few alternative sources of supply).

This analysis, purely based on trade data, provides a screening of the products for which trade dependencies can represent a potential vulnerability. However, it needs to be combined with additional data and insights to identify the products for which dependencies represent an actual risk, depending on the strategic importance of these products, the importance of imports and exports for EU production and consumption, and the reliability of the partners concerned.

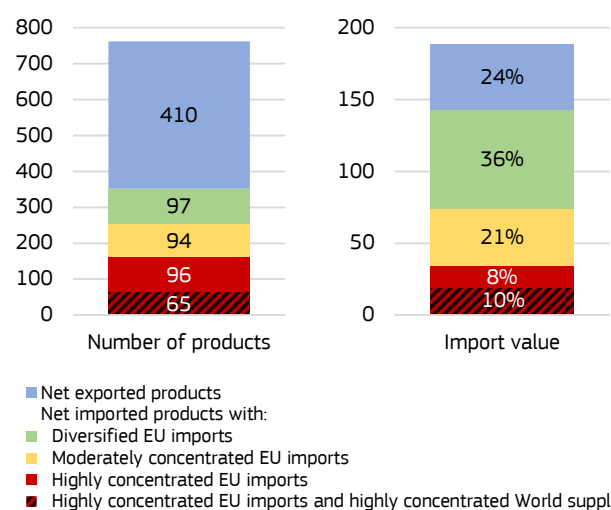
The origin of EU agri-food imports products is overall diversified, but some dependencies remain

EU total agri-food imports remain well diversified overall, with the top EU sources of imports (Brazil, the UK and US), representing just 10%, 8% and 7% of EU

total import value in 2025. However, at a detailed product level, some potential dependencies appear.

Out of 762 agri-food products reviewed, there were 352 products for which the EU was a net importer in 2025 (Figure 6). Of those, there were 94 products for which EU imports are moderately concentrated and 161 products for which EU imports are highly concentrated, including 65 for which the World supply is also concentrated.

Figure 6 Dependency status of EU agri-food imports by number of products (left) and by value of EU imports (right, billion EUR) in 2025



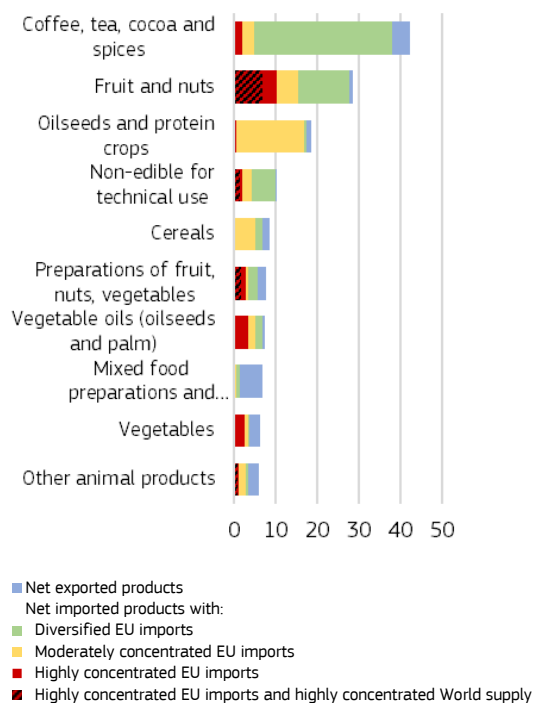
Source: DG Agriculture and Rural Development, based on COMEXT and CEPII - BACI. Detailed methodology at the end of the section.

Looking at the corresponding import values, 61% of EU import value (EUR 114.4 billion) was for products for which the EU is either a net exporter or for which EU imports were well diversified, therefore with a low risk of import dependency. 21% of EU import value (EUR 40.3 billion) was for products for which EU imports were moderately concentrated and 18% (EUR 34.1 billion) was for products with highly concentrated imports, including 10% for which World exports were also concentrated.

Among the most imported product categories in 2025 (Figure 7), those with most value exposed to risks of

import dependencies were: fruits and nuts, vegetable oils, and preparations of fruits and nuts and vegetables. Most imports of cereals, oilseeds and protein crops were also moderately concentrated.

Figure 7 Value of EU imports by dependency status for top 10 most imported product categories in 2025 (billion EUR)



Source: DG Agriculture and Rural Development, based on COMEXT and CEPII - BACI.

For most products, there was no significant change in the distribution of the origin of EU imports and their overall level of diversification between 2025 and 2024. Only 7% of products changed import dependency categories with an overall downshift movement from highly concentrated imports (from 23% in 2024 to 18% in 2025 of total EU import values) to lower dependency categories. This improvement in import diversification concerned in particular cereals and oilseeds and protein crops (mainly due to the lower share of Ukraine in EU imports in 2025), as well as vegetable oils.

EU agri-food exports are well diversified and potential export dependencies are more limited

EU total agri-food exports were also well diversified, although slightly more concentrated than imports at country level, with the top EU export destinations (the UK, US and Switzerland), representing 23%, 12% and 6% of EU total export value in 2025, respectively. Export dependencies at product level were also rather limited.

Out of 410 products for which the EU was a net exporter in 2025 (Figure 8), there were 58 products for which EU exports are moderately concentrated and 95 for which exports are highly concentrated, including 19 for which World import demand is also concentrated.

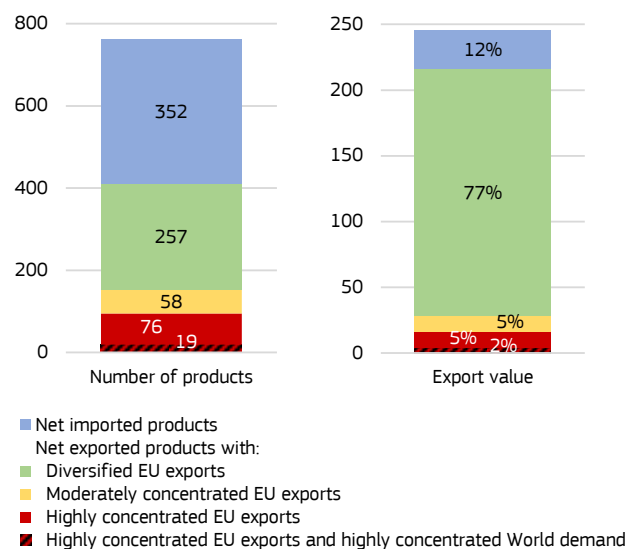
In terms of exports value, there are 5% (EUR 11.5 billion) of EU exports that are for products with

moderately concentrated exports, 7% with highly concentrated exports (EUR 16.7 billion), including just 2% with also highly concentrated World demand (therefore with somewhat more limited alternative markets).

The categories with higher value exposed to risks of export dependencies in 2025 were: pigmeat, poultry and eggs, vegetables and tobacco products. For pigmeat, out of EUR 12.1 billion exported by the EU in 2025, there were EUR 4 billion for products with highly concentrated exports whereas for poultry and eggs, out of EUR 6.5 billion of EU exports in 2025, there are EUR 3.1 billion in products with highly concentrated exports.

The level of diversification of the destinations of EU exports remained stable for most products in 2025 compared to 2024, with less than 3% of products changing dependency categories.

Figure 8 Dependency status of EU agri-food exports by number of products (left) and by value of EU exports (right), billion EUR) in 2025



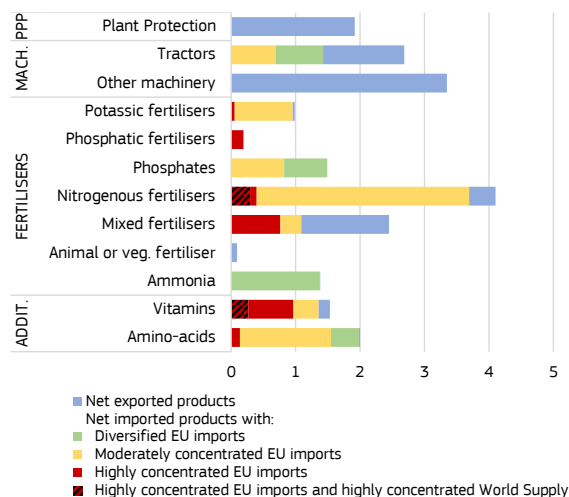
Source: DG Agriculture and Rural Development, based on COMEXT and CEPII - BACI.

The EU had moderately concentrated fertilisers imports and highly concentrated additives imports in 2025

Among agri-food inputs, the EU was a net exporter for plant protection products (PPP) and most of the machinery in 2025. However, it was a net importer for most fertilisers and feed additives (see Figure 9).

For feed additives, EU imports are highly concentrated for most vitamins including a few of them for which World exports are also concentrated. With regards to fertilisers, most EU imports were moderately concentrated in 2025, including nitrogenous fertilisers, potassic fertilisers and phosphates. Some imports of mixed fertilisers and phosphatic fertilisers however were also highly concentrated.

Figure 9 Value of EU imports by dependency status for imported product categories in 2025



Source: DG Agriculture and Rural Development, based on COMEXT and CEPII - BACI.

Compared to 2024, the level of potential import dependency changed for 6% of EU imports of inputs in 2025. One of the main movements was for amino-acids, for which the level of diversification of EU imports improved from mainly highly concentrated imports in 2024 to moderately concentrated in 2025. This is mainly explained by a lower share of China in EU imports of amino-acids in 2025. An opposite trend can be observed for fertilisers, with some imports of nitrogenous fertilisers and phosphatic fertilisers becoming slightly more concentrated.

The Commission will continue monitoring the evolution of trade flows and their diversification across partners, both for agri-food products and inputs, with particular attention to potential trade dependencies in the current volatile geopolitical environment.

Methodology: The analysis of EU trade in agri-food products and agri-food input is based on data on the value of EU trade flows at the HS6 level (rev. 2022) from Eurostat COMEXT for the years 2025 and 2024 extracted on 13/04/2025. The scope of agri-food products covered and their classification is based on a adaptation from the CN8 to the HS6 level of the classification used in DG AGRI for the purpose of trade analysis (Agri-food trade – Details of the 6 classes of products). The list and classification of agri-food inputs is based on expert feedback. The concentration of EU imports and exports is measured on these data using the Herfindahl-Hirschman indicator (HHI), applied to EU trade flows across all partners. Imports (resp. exports) of a product are considered to be well diversified if the HHI is below 0.25; moderately concentrated if the HHI is between 0.25 and 0.4; and highly concentrated if the HHI is greater than 0.4. The concentration of World exports and imports is measured using data on global trade flows in value from the CEPII-BACI database. The last year available being 2024, the level of concentration of World trade is measured for each product as the average of the HHI between 2022 and 2024. World exports (resp. imports) of a product are considered to be highly concentrated if the average HHI is greater than 0.4. This information is then matched for each product with the information on the concentration in EU trade flows in 2025.



Contact: DG Agriculture and Rural Development, Analysis and Outlook Unit, Governance of the agri-food markets Unit
Email: AGRI-CONTINGENCY-PLAN-FOOD-SECURITY@ec.europa.eu

https://agriculture.ec.europa.eu/common-agricultural-policy/agri-food-supply-chain/ensuring-global-food-supply-and-food-security_en

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