European Commission

Agriculture and rural development

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

Autumn 2026 – Nr 7





CONTENT

1. State of food security in the EU

2. Zooming into: the fertiliser market situation in 2026

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 in September 2026 and submitted to members and observers of the expert group of the EFSCM. In total, 29 written replies were submitted (13 from Member States and regional representatives, 3 from non-EU national authorities and 13 from stakeholder organisations) covering different stages of the food supply chain, including input providers, producers, processors, and representatives of the retail sector. Survey results have been complemented with input provided by the EFSCM members/observers participating in an interactive workshop held on 15 September 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 the fertiliser market. This is presented in the “Zooming into” part of the report.

The content of this publication does not necessarily reflect the position or opinion of individual members/observers of the EFSCM or the European Commission.

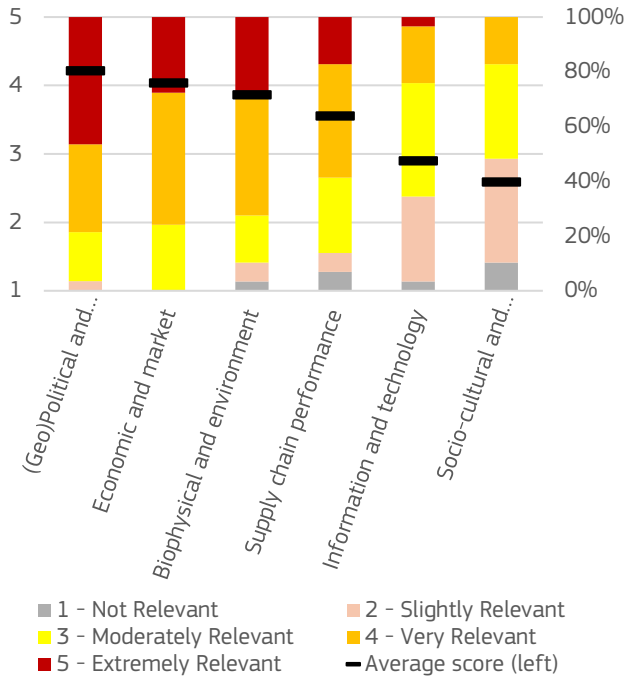
1. State of food security in the EU

Compounded geopolitical, economic and weather risks are perceived as the most relevant risks for EU food security in the second half of 2026

The first section of the survey was dedicated to the assessment of relevant risks for food supply and food security for the second half of 2026. Respondents were asked to indicate on a scale of 1 to 5 how relevant they perceived each of the six main types of risks identified in a 2023 JRC report on the Risks and vulnerabilities in the EU food supply chain.

(Geo)political and institutional, economic and market as well as biophysical and environment risks were identified as the most relevant types of risks for food supply and food security, with average scores of respectively 4.2, 4 and 3.9 and more than 70% of respondents considering them as very to extremely relevant (see Figure 1). Supply chain performance risks followed with an average score of 3.6. Information and technology as well as socio-cultural and demographic risks were considered as less relevant, with average scores of 2.9 and 2.6 and most respondents considering those risks as moderately relevant or less.

Figure 1 Average score (left) and distribution of expressed responses (right) on the relevance of main types of risks for food supply and food security in the second half of 2026



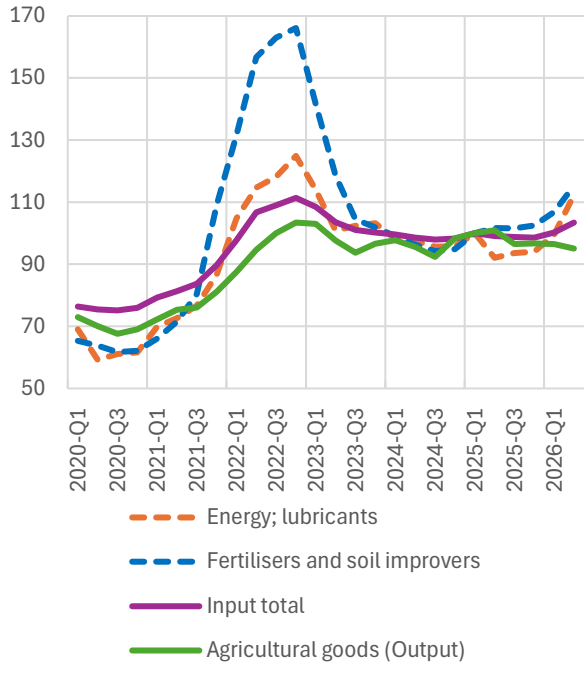
Source: EFSCM respondents' answers

Among the most relevant (geo)political and demographic risks identified, most respondents referred to the continuation of Russia's war of aggression against Ukraine, including new disruptions in food and feed trade through the Black Sea, as well as to the repercussion of the conflict in the Middle East and the disruption of maritime trade through the Strait of Hormuz, in particular on energy and fertilisers prices and supply. Respondents also referred to risks created by trade policy uncertainty, including tariffs, risks of political instability in Europe, as well as regulatory challenges.

Many respondents listed volatile and high production costs as one of the most relevant economic and market risks for food supply and food security, in particular with regards to energy and fertiliser, with concerns as well, in terms of availability. Labour costs and availability as well as tight financial liquidity and high borrowing rates were also mentioned as risk factors on the supply side. Tightening economic conditions and instability could also affect food demand, as inflation and higher interest rates put pressure on households' purchasing power.

While supply side risks could lead to higher food prices, respondents mentioned the difficulty in passing on higher costs from producers to consumers, with pressures to keep prices low amidst increased global competition. Such a divergence between input costs and farm gate prices is visible in the first half of 2026 (see Figure 2). The average price of agricultural inputs increased by 4.7% in the second quarter of 2026 compared with the second quarter of 2025, with even higher increases for energy and fertiliser prices. At the same time, the average price of agricultural output in the EU fell by 5.8% in one year. While a lag between input and output prices is often observed, such a divergence between input and output prices could put EU farms' profitability under pressure if it was sustained.

Figure 2 Evolution of agricultural input and output prices in the EU (Index: Q1.2025=100)



Source: Eurostat (apri_pi_outq, apri_pi_inq)

Within biophysical and environment risks, most respondents considered recent climate change related weather events and their increased frequency and intensity as the most relevant risk for EU food supply and food security. The multiple and extreme heatwaves as well as prolonged droughts observed during the summer of 2026 have damaged crops, including fruits and vegetables but also bedding and fodder. The latest JRC MARS forecasts from September indicate yields well below the five-year average for several major summer crops in the EU, including; soybeans (15 % lower), green maize (14 % lower), sugar beet (11 % lower), grain maize (8 % lower), potatoes (7 % lower). EU averages mask even more substantial reductions for certain member states or regions. Beyond volumes, the recent hot and dry conditions have also affected the quality of the harvest. The reduced feed and fodder availability could also lead to reduced livestock numbers in certain regions. Very low water levels on the Rhine and Danube have also restricted shipping, including for animal feed and fertilisers imports.

Do you know where to find food supply indicators?

https://agridata.ec.europa.eu/extensions/FoodSupply/FoodSupply.html

Beyond the events observed during the summer of 2026, the increasing frequency and intensity of extreme weather events due to climate change were cited by many respondents as an important risk factor, with the alternance of more severe heatwaves, droughts, forest fires, storms and heavy rainfall. Against this background, the onset of a stronger than usual El Niño cycle is also expected to affect production globally, with effects already visible in some regions (see August JRC assessment). Climate change is also a source of higher pests and animal diseases pressures.

With regards to supply chain performance risks, most respondents referred to transport and logistical disruptions stemming from the geopolitical risks (namely disruptions in the Strait of Hormuz, Red Sea and Black Sea), as well as weather challenges (low water levels in inland waterways) with limited road and rail alternatives. These disruptions constrain trade flows of agricultural inputs, including energy, fertilisers and feed, as well as machinery, packaging and food. They create bottlenecks within food supply chains, as well as costly delays, including due to increased food losses and waste, particularly when combined with high temperatures. EU import dependencies for fertilisers, energy, feed additives and other key inputs along the supply chains as well as certain food products, were identified as aggravating factors in this context.

Among other risks cited by respondents, generational renewal and labour shortages appeared in multiple replies with regards to demographic and socio-cultural risks. Cyber-attacks along the food supply chain and critical infrastructure, as well as the threat of drone attacks were equally cited within information and technology risks. It must be noted that the survey was conducted before the cyberattack which affected the refrigeration systems of numerous supermarkets in France on October 11th, which strongly highlighted the relevance of these risks for food supply chains.

In the interactive workshop complementing the survey, participants stressed that more than individual impacts, it's the compounding nature of the current risks which should be considered as the main novel element. Participants pointed at the interaction between drought and other climatic events, energy and transport costs, geopolitical instability, disruptions to transport routes and regulatory requirements. The accumulation of these pressures was considered having the potential to increase the complexity of disruptions and amplifying their effects on food and feed supply chains.

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

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

Level of risk to EU food security remains perceived as moderate, with more concerns on affordability than availability

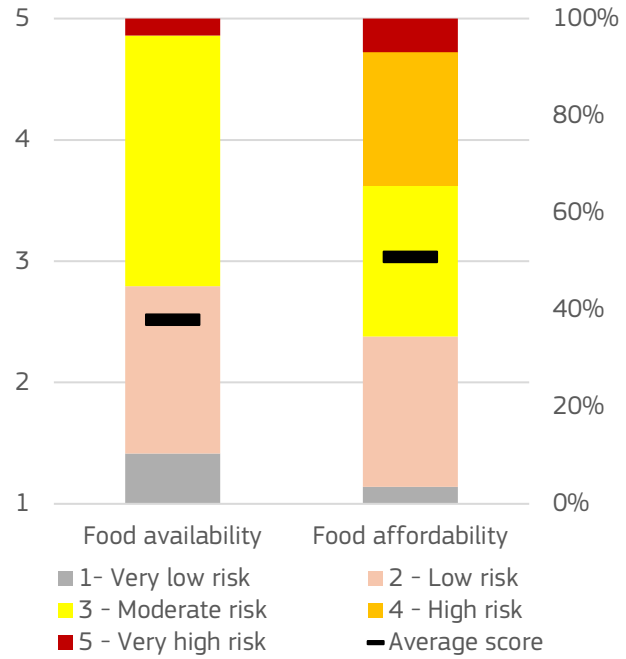
Respondents were asked to score their perception of the level of risk to food availability and food affordability in the second half of 2026 on a scale of 1 to 5 (from very low to very high risk).

The resulting score for food availability was 2.5 on average, corresponding to a low to moderate risk assessment (see Figure 3). 52% of respondents considered the level of risk to food availability as moderate, 44% as very low to low, and just 3% as very high. The resulting score for the level of risk to food affordability was 3, corresponding to a moderate level of risk, higher than for food availability. Responses were also more split, with 31% of respondents assessing the risk as low, 31% as moderate, 28% as high, 7% as very high and 3% as very low.

This moderate level of perceived risk to food security (availability and affordability) is comparable to the result of the Spring 2026 survey, indicating a relative stability. Detailed replies indicate that EU food supply is generally considered to be resilient, without indication of systemic shortage at EU level, due to a diversified food production in the EU, well developed supply chains and access to international markets. However, temporary disruptions for specific regions and sectors cannot be excluded due to the combination of risks presented above. The higher perceived risk for food affordability also indicates that while the different risks discussed

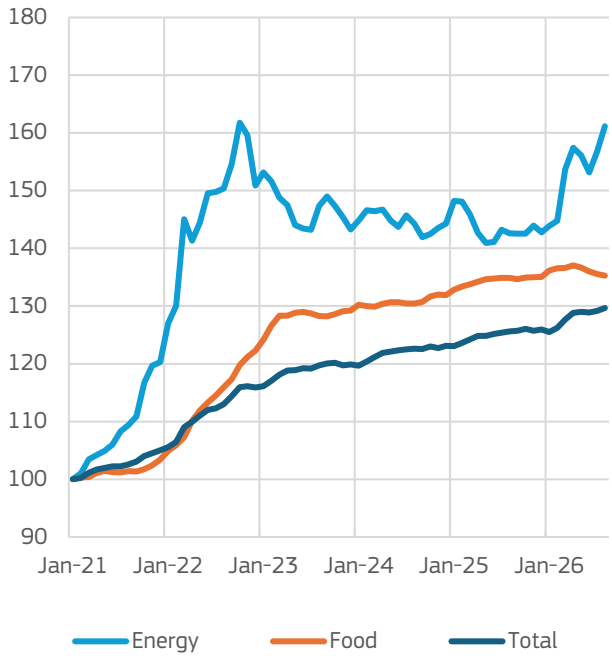
above may not put food availability at a significant risk, the combination of tightening economic conditions, higher production costs and supply chains disruptions could put food affordability under pressure.

Figure 3 Average score (left) and distribution of expressed responses (right) on the overall level of risk to food availability and food affordability in the second half of 2026



Source: EFSCM respondents' answers

Figure 4 Evolution of Household Consumer Price Index for food products, energy and general consumption in the EU (Index: Jan. 2021=100)



Source: Eurostat (prc_hicp_minr)

So far, food prices have remained stable in the past year, with an annual inflation rate of 0.3% in August 2026 compared to August 2025. They even declined in recent months, by 1.3% between April and August. However, energy prices have strongly increased, reaching an annual inflation rate of 13% in August, while general inflation has accelerated, reaching 3.2%. This risks tightening consumers' purchasing power.

Food security is expected to remain under pressure in the next semester

Looking ahead, most respondents foresee a rather negative evolution of the situation for food supply and food security in the next 6 months. The disruptions and uncertainties identified above are expected to persist and to continue interacting with one another. Higher production costs and the impact of these disruptions are expected to progressively reach consumers and translate into higher food prices, putting further pressure on food affordability.

When asked about other events or emerging trends which could affect food supply and food security in the upcoming semester, several respondents indicated potentially higher risks of animal and zoonotic diseases. Energy availability and prices over the winter are expected to remain a concern and the impacts of a strong El Niño could affect global markets. Several respondents also indicated potential risks of cyber- and hybrid attacks. Some respondents also reported concerns that the entry into force of several regulations such as the Packaging and Packaging Waste Regulation (PPWR) and EU Deforestation Regulation (EUDR), could translate into additional constraints for food supply chains.



2. Zooming into: the fertiliser market situation in 2026

The global fertiliser market has remained volatile throughout 2026, mainly due to ongoing geopolitical developments. The escalation of the conflict in the Middle East, disruptions in the Strait of Hormuz and damage to energy infrastructure have also affected the EU market. Higher natural gas prices have continued to put pressure on nitrogen (N) fertilisers. While, at the same time, sulphur shortages have kept phosphatic (P) fertiliser prices at high levels throughout 2026.

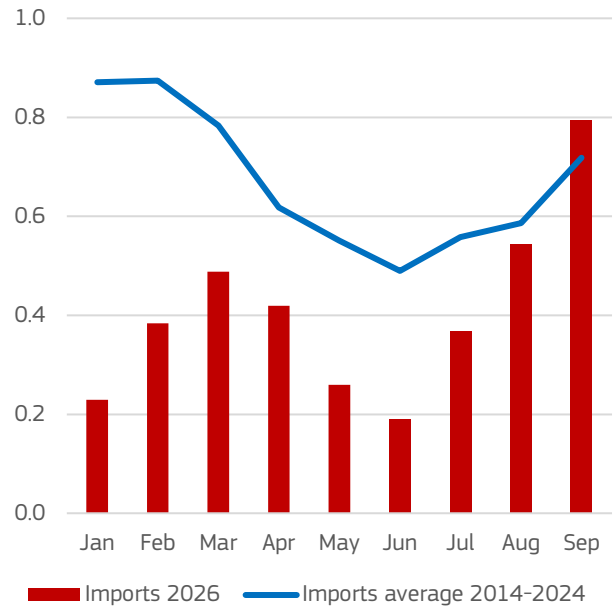
Fertiliser supply remains broadly sufficient, with availability not currently posing a major constraint. However, high prices are putting increasing pressure on farmers' margins and making fertiliser purchases more difficult to absorb. This is also affecting farm-level decisions on fertiliser application and, in some cases, crop planning.

Imports of nitrogen fertilisers are returning to historical averages, with shifting trade flows

Following a period of significant stockpiling towards the end of the year, annual EU imports of nitrogen fertilisers reached a record of 12.3 million tonnes in 2025. This was followed by a marked slowdown in imports in 2026, with monthly volumes remaining well below average levels for the first seven months of 2026. Between January and July 2026, the EU imported 2.34 million tonnes of nitrogen fertilisers, less than half the historical average for the same period.

The introduction of additional customs duties at the beginning of the year significantly reduced Russian fertiliser supplies to the EU, leading to a marked shift in the EU's import structure. Egypt filled the gap and became the EU's largest supplier of nitrogen fertilisers, accounting for around half of total import volumes.

Figure 5 Imports of nitrogen fertilisers in 2026 in million tonnes



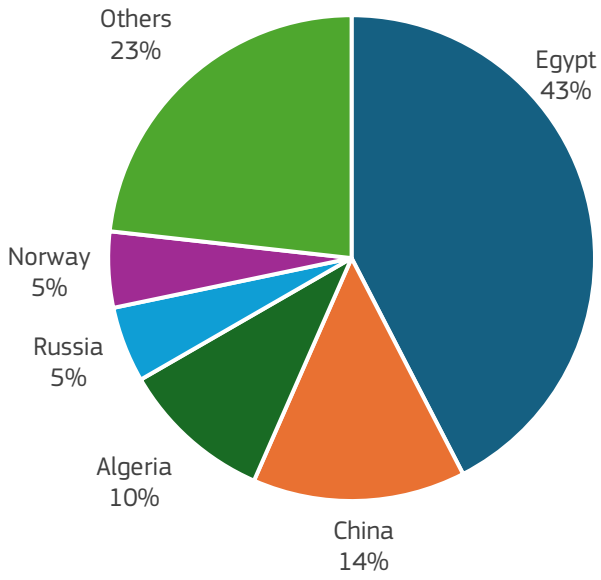
Source: DG Agriculture and Rural Development, based on COMEXT (Jan-Jul) and TAXUD Customs Surveillance (Aug-Sep).

By August, the sustained decline in imports had offset the stockpiling observed in late 2025. Monthly imports then recovered in August (0.54 million tonnes) and

September (0.8 million tonnes) 2026, returning to levels broadly in line with historical averages (Figure 5).

The main suppliers of nitrogen fertilisers to the EU (Figure 6) were Egypt, China, Algeria, Russia, Norway and others.

Figure 6 The EU's main suppliers of Nitrogen fertilisers – January-September 2026



Source: DG Agriculture and Rural Development, based on TAXUD Customs Surveillance and COMEXT data.

Imports of phosphatic fertilisers, particularly DAP/MAP, remain significantly below historical levels, with volumes around 45% lower than in previous years. Imports totalled almost 800 thousand tonnes in 2026 so far, including around 80 thousand tonnes in September. In contrast, the potash market remains stable, with imports broadly in line with historical averages, reaching around 2 million tonnes during the first eight months of 2026.

Increased prices and reduced affordability

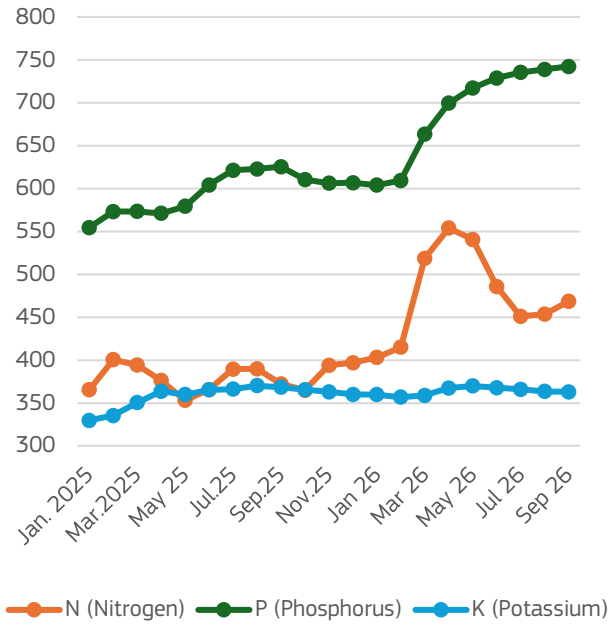
Nitrogen fertilisers are particularly sensitive to natural gas prices, gas being a major input cost in ammonia production. Phosphorus fertilisers are influenced by the costs and availability of sulphur and phosphate rock, while potash prices are primarily linked to the availability and cost of potash ore, mining and processing, as well as energy and transportation costs.

The escalation of the conflict in the Middle East has significantly affected the nitrogen and phosphatic fertiliser markets, mainly through higher natural gas prices and disruptions to sulphur supply. Natural gas prices fluctuated between EUR 70 and 80/MWh throughout September, remaining more than twice as high as February 2026. The resulting increase in production costs has affected EU fertiliser production. Several producers temporarily curtailed or reduced output in September and October, particularly ammonia production, while others increased their reliance on imported ammonia. At the same time, sulphur has more than doubled in price within one year.

These higher input costs have translated into significantly higher fertiliser prices, peaking in April 2026 for nitrogen before stabilising for the rest of the year at levels significantly higher than in 2024 and 2025. For phosphatic fertilisers, the price surge is still on-going, with no stabilisation so far.

From September onwards, fertiliser demand started to recover ahead of the next growing season, contributing to renewed upward pressure on prices, along further escalation in the Middle East and other geopolitical factors. At the end of September, nitrogen fertiliser prices in the EU reached a level that was 45% higher than the one in 2024. Phosphatic fertiliser prices are 27% above their 2024 level, further increasing the cost burden on farmers.

Figure 7 Evolution of EU fertilisers prices aggregated by nutrient in EUR/t



Source: DG Agriculture and Rural Development, based data from Argus Media Ltd. and S&P Global Commodity Insights.

Against a backdrop of lower yields linked to adverse climate conditions and subdued crop prices, higher fertiliser costs are putting additional pressure on farm margins and making fertiliser purchases increasingly difficult to absorb.

For nitrogen fertilisers, price developments remain closely linked to the energy market and are expected to ease as energy prices stabilise. The outlook for phosphatic fertilisers is more challenging, with damage to sulphur infrastructure and already limited global supply expected to keep prices elevated for a longer period.



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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While all efforts are made to provide sound market and income projections, uncertainties remain.
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