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Moving the needle on transforming food systems:

What's blocking progress in Europe and the UK and where investments can help

Pierre Marie Aubert, Rachel Headings, Christian Reynolds, Monika Zurek, Tara Garnett, Amanda Harding

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Introduction

Food systems in Europe and the UK[1] are not delivering for people or the planet. While this may sound stark, it reflects well-documented poor health outcomes, environmental harm and the persistent difficulty of making healthy and sustainable diets affordable and accessible — particularly for those most affected and least represented.[2] Despite sustained efforts by many actors over several decades, as well as the opening of some political windows of opportunity in recent years (e.g. with the Farm to Fork Strategy in the EU,[3] or the UK government food strategy for England[4]), progress has fallen short of what is needed.

Against this backdrop, this report examines the activities of food system stakeholders trying to create change (referred to here as 'changemakers') across Europe and the UK, alongside the research landscape that supports them. It identifies priorities for investment — including both what to fund and how to fund it — to better align research with action, accelerate food system transformation and enable better health, climate and equity outcomes. The analysis is grounded in an *impact pathway framework*, which articulates how actions and interventions are expected to lead to change through a sequence of cause-and-effect relationships, ultimately contributing to these three outcomes.

Key findings and recommendations

- Changemakers consistently emphasised the **need for dietary change** as a priority for enabling food system transformation. They especially emphasised a shift toward more plant-based diets (particularly fruits, vegetables and pulses), alongside reduced consumption of animal-source foods and foods high in fat, salt and sugar. One common approach for dietary shift was **changing food environments**[5] to make healthy and sustainable choices easy, attractive and affordable.
- Changemakers identified seven priority action areas to reshape food environments and support these shifts, largely reflecting realist or reform-oriented approach:

  1. developing public procurement policies;
  2. supporting local food interventions;
  3. getting retail and food services to change their offer;
  4. supporting product innovation;

1 In this report, 'Europe and the UK' refers primarily to the EU-27 and the United Kingdom, with empirical work focused on seven countries and the EU level.

2 EEA (2022). Transforming Europe's food system – Assessing the EU policy mix. Copenhagen, European Environment Agency, 106 p.

3 Schebesta H. & Candel J.J.L. (2020). Game-changing potential of the EU's Farm to Fork Strategy. Nature Food, 1 (10), 586-588. doi: 10.1038/s43016-020-00166-9

4 Defra, 2025. A UK government food strategy for England, considering the wider UK food system.

5 Understood here to be the physical, economic, political, cognitive and socio-cultural contexts in which people acquire, prepare and consume food. See e.g. Wunder S. & Brocard C. (2025). Towards national food policies that support healthy and sustainable consumption. Country case studies and the role of EU food policy. Berlin – Paris, Agora Agriculture & Iddri, 48 p.

5. developing fiscal measures;
6. regulating marketing;
7. repurposing agricultural subsidies

- Efforts to advance these actions face **five overarching barriers** across the stakeholkders and research workstreams:
  - Structural power imbalances which tend to favour actors invested in maintaining the status quo, particularly where dietary shift and reducing consumption is concerned;
  - Unfavourable policy and institutional frameworks which are hard to navigate;
  - Polarised public and political debates;
  - Fragmentation across both practice and research communities;
  - Impractical, inaccessible or inadequate evidence, particularly on how to achieve change politically and economically, and limited uptake of evidence in decision-making.

- We identify **four priorities for future investments**:
  - Reorient the research agenda towards applied research, especially in evaluation, economics and politics/political economy;
  - Strengthen links between evidence generation and decision-making by (1) involving changemakers throughout the research process and (2) supporting research translation and synthesis;
  - Support long-term, multi-actor collaborations;
  - Build compelling, evidence-based narratives and framings that can influence policy and public discourse.

- The above priorities apply differently to various action areas across geographic regions and time scales and lead to **three concrete recommendations**:
  - **Near-term impact action areas**: Strengthen public procurement, support local food interventions and strategies, and support retailers and food service providers,
  - **Build change over the long-term**: Further explore action areas that challenge food system structures such as product innovation and reformulation, fiscal measures, marketing and advertising and repurposing agricultural subsidies. These areas require deeper feasibility and political economy analyses to identify where to invest, with what potential for impact and with whom to unlock progress These areas also require greater synthesis and translation of existing evidence.
  - **Transformative opportunities**: There is significant potential in funding research and interventions which explore transformation pathways more broadly, focusing on socio-cultural, political and economic factors beyond the seven action areas examined in this study.

1 How we identified investment priorities

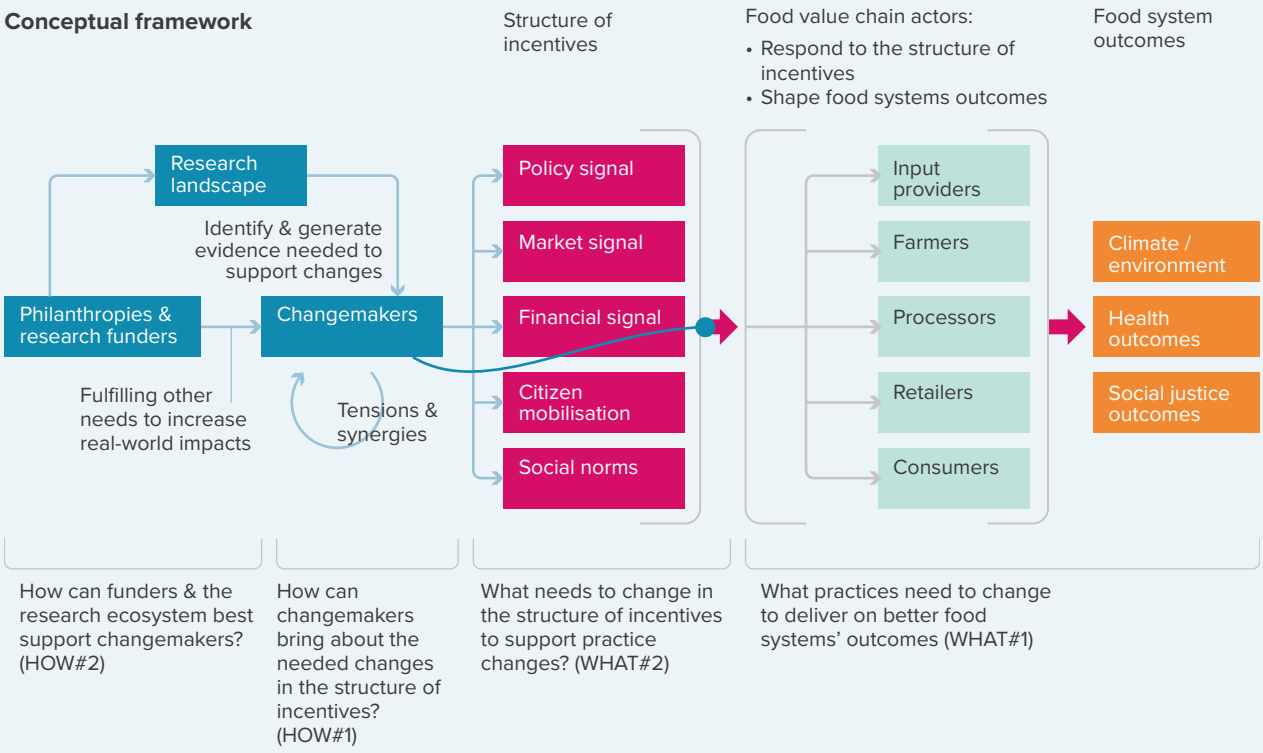
This study applies an impact pathway approach[6] to identify how activities and interventions are expected to have impact. We developed a general impact pathway for food system transformation to assess current change efforts and guide future investments to maximise impacts for better health, climate and equity outcomes (see Figure 1). Change priorities were analysed across four dimensions:

- *What* needs to change in the practices of food systems' actors to improve the three targeted outcomes (**WHAT#1**);
- *What* needs to change in the structure of incentives (from prices and subsidies to laws, standards, public pressure and social norms) that shape these practices (**WHAT#2**);
- *How* change in those incentives might actually happen (**HOW#1**). This includes the activities changemakers carry out to change the food system, as well as the resources they rely on (including evidence resources);
- *How* these evidence resources are generated (what is researched, how is the research carried out, by and with whom) and how this affects the ability of changemakers to make use of that evidence (**HOW#2**).

Our empirical study (see Box 1) investigated what changemakers, research funders and knowledge generators are doing in practice across Europe and the UK, as well as their priorities and goals for food system change – the results from this characterise the current practice and research landscape. The collected data enabled us to identify how research funder investments (HOW#2) connect to changemaker activities (HOW#1) through research publications and policy papers.

6 Weiss C.H. (1997). How can theory-based evaluation make greater headway? *Evaluation Review*, 21 (4), 501-524. doi: 10.1177/0193841X97021004

Figure 1: Impact pathway model for food system interventions. Source: Authors



Box 1: Data collection to characterise the current situation. Source: Authors

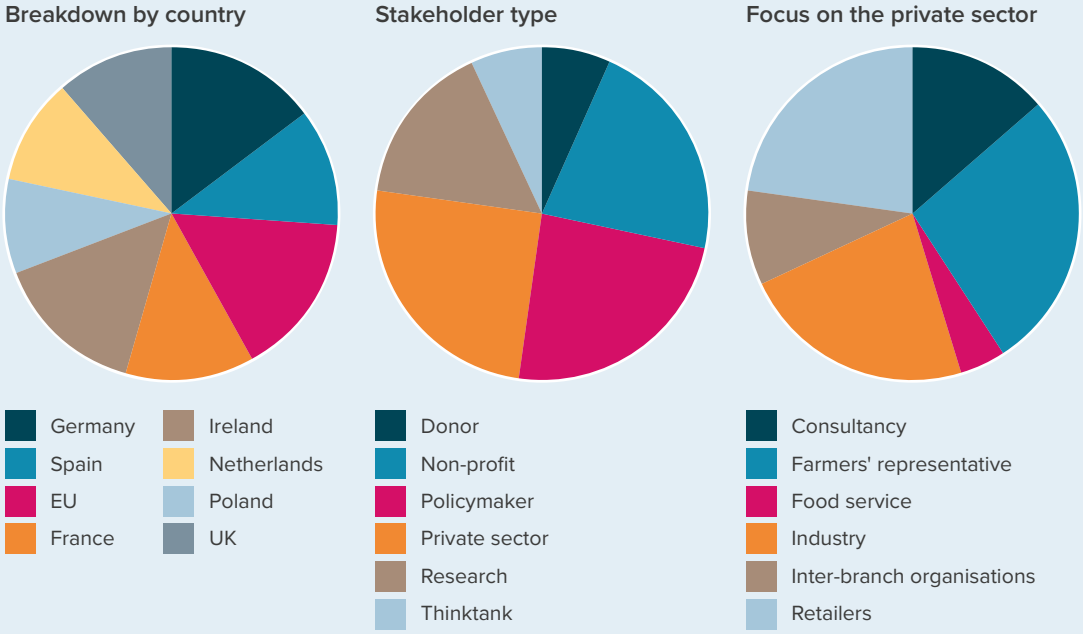
We combined two work streams to map what is being done to change food systems and how these activities are expected to contribute to change:

Our first work stream explored what food system outcomes changemakers are aiming to improve for health, climate and equity in eight geographic regions (seven countries: UK, Germany, France, Spain, Poland, the Netherlands and Ireland, plus at the EU level [Brussels]). Through a combination of interviews and workshops, we investigated what changes they pursue, how they do that and with what purpose. We intentionally prioritised changemakers from different actor groups, working across different parts of the food system, including: food businesses and industry actors (farmers, processors, retailers), third sector and not-for-profit organisations, government representatives and policy actors, financial and funder organisations and experts and evidence generators. Participants were selected based on the project team's and country partners' existing knowledge of actors across the different geographic regions, drawing from our own networks. We also drew upon recommendations from Wellcome. While this means there is some bias in the participant selection, mitigating factors include:

8. the fact that the project team is highly networked and, as such, has a very broad overview of the landscape of activity in their geographical region; and
9. the overall large number of actors interviewed across Europe and the UK helped offset the particular biases of any one individual interviewer.

That said, at least one actor category is quite under-represented in our sample, namely financial actors.

Figure 2: Interview breakdown by countries and categories of actors. Source: Authors



The second work stream examined the current evidence landscape at the intersection of health, climate and food. By mapping the evidence sources cited in policy documents, peer-reviewed publications and grants using Overton and Dimensions.ai databases, we assessed how evidence on health, climate change, and sustainable food systems informs policy in the EU, UK, EEA and Switzerland. We also linked cited outputs to grant data to identify the funders, institutions and collaborations associated with policy-relevant research. The mapping led to the extraction of the following documents that were then analysed. The mapping covered 7,573 policy documents and 26,693 unique research outputs, linking 11,952 outputs to 14,656 grants.

Additionally, we conducted an AI-assisted scoping review of academic, peer-reviewed literature (n=391, 2022-2025) to contextualise and validate findings from the wider study. Alongside both, we administered a virtual survey using Qualtrics (eliciting around 440 responses) to understand the perspectives of knowledge generators and researchers, validate the findings from the scoping review and compare their views with what we heard from food system stakeholders.

Our analysis followed a **portfolio approach** based on the idea that progress towards impacts in complex systems, such as food systems, will emerge through a combination of diverse actions over time, rather than from any single intervention.[7] As there are many ways in which a portfolio can be developed and thought about, we further define four **principles** to identify investment priorities. These are:

1. **Impacts**. The projects that together constitute the portfolio should contribute to delivering on the targeted health, climate and equity end goals. Simple indicators and guardrails are developed to guide this impact assessment.
2. **Synergies**. The different projects should support and reinforce each other towards the three end goals of health, climate and equity.
3. **Strategic gaps and complementarities**. Funders should move beyond the individual organisation to identify gaps and missed opportunities to maximise complementarities and ensure additionality.
4. **Risk-reward**. A portfolio should include a mix of highly feasible projects and more ambitious initiatives that might be more challenging to deploy.

The investment recommendations were developed and tested together with changemakers in the framework of several workshops organised at country level and in Brussels. In addition, they were stress tested with the Wellcome staff against a set of UK food system scenarios (see Box 2).

Box 2: Data collection to establish investment priorities. Source: Authors

To reflect on investment priorities, we organised a two-day, in-person workshop held in Brussels (24-25 Feb 2026) which brought together 67 changemakers (across five actor groups and the eight geographies) with the project team members and country partners to sense-check our early findings and co-develop impact agendas around priority actions, research needed to support these actions and related investment priorities (over 80 participants in total). Prior to the workshop, participants were invited to participate in an iterative, collaborative online survey (known as Reflect-Blend-Share methodology) that generated substantial engagement and key inputs to the Brussels workshop. During and after the workshop, participants' contributions were captured and synthetised, resulting in a brief outcome document disseminated to participating changemakers, identifying plausible pathways connecting across actions and research priorities, actors and scales.

These priorities were further refined, re-worked and tested against several scenario narratives in two foresight workshops, drawing on the recently developed AFN+ Network (now called Root and Reason) scenarios report on UK food futures for 2050.[8]

7 Cabaj M., Wellsch B. & Perla K. (2026). There is no such thing as a Fish. Tamarack Institute, 56 p.

8 AFN+ Network (now called Root and Reason), 2023.

2 Changing food practices through food environments: the WHAT and the HOW

Changemakers consistently emphasised the need for dietary change as a priority for enabling food system transformation (**WHAT#1**). They especially emphasised a shift toward more plant-based diets (particularly fruits, vegetables, whole-grains and pulses), alongside reduced consumption of animal-sourced foods and foods high in fat, salt and sugar.[9] These changes are often approached through a *food environment lens*, understood here as the physical, economic, political, cognitive, and socio-cultural contexts in which consumers engage with the food system to make decisions about purchasing, preparing and consuming food.[10] This food environment approach enables changemakers to address different dimensions of food systems while aiming to improve the *availability*, *attractiveness* and *affordability* of healthy and sustainable foods.

Changemakers tend to work across seven key areas to enable dietary change (the **WHAT#2** of our impact pathway):

- Improving public procurement
- Supporting local food interventions and strategies
- Supporting retail and food service
- Supporting product innovation and reformulation
- Developing fiscal measures
- Regulating marketing and advertising
- Repurposing agricultural subsidies (especially the Common Agricultural Policy).

While changemakers agreed overall on what needs to change, there was less consensus around how to bring about these changes (**HOW#1**). Three main *routes to transformation* emerged. These routes are not mutually exclusive, and individual action areas can be pursued through more than one route. A **policy route** about shaping rules and incentives (public procurement, local food strategies, fiscal measures, marketing and advertising regulation, agricultural subsidies); a **market route** about collaborating to change market structures (retail and food service, product innovation and reformulation, fiscal measures, marketing and advertising regulation) and a **local route** about community-scale action and citizen empowerment (public procurement, local food interventions and strategies).

9 Note that while there was broad agreement on these directions of change, changemakers differed on the scale and pace of dietary shifts, the role of different animal-source foods, and how to discuss alternative proteins and ultra-processed foods in ways that avoid polarisation.

10 HLPE (2017). Nutrition and food systems. Rome, High Level Panel of Experts on Food Security and Nutrition, 151 p, Brocard C. & Saujot M. (2023). Environment, Inequality, Health: what strategies for French food policies? Iddri – Study, 01.

The policy route tended to be the default option, with policy change widely regarded as essential for achieving overarching food system transformation. However, this route is also perceived to be slow, highly sensitive to political dynamics, difficult to secure and often yields mixed results. Therefore, changemakers are increasingly shifting their focus toward the two other routes, pursuing market solutions or local solutions both independently and in mixed approaches which combine multiple routes.

Regardless of the route pursued, changemakers require a sufficient understanding of the landscape in which they operate, as well as adequate data to inform their decisions. All interventions to transform the food system exist within an already active landscape of funding and research, which both shapes and influences changemaker practices and approaches to change. This includes: how research is funded and carried out, what topics are most researched and which are under-researched, who conducts this research and who funds it – all of which affects what knowledge is made available to changemakers and, as a result, how they use evidence to actually make decisions and apply it to create change (**HOW#2**): As of today, research funding and collaboration are concentrated among a small group of mostly Western European countries and institutions, and a few research organisations who are largely located in Western Europe (UK, Germany, France, the Netherlands and Spain) and who collaborate with each other. This concentration helps sustain strong research networks but may also limit innovation and reinforces existing hierarchies and biases:

- Research activity is concentrated around climate, health, land and food security, and is much weaker on equity, governance and other social dimensions such as poverty and gender.
- While some research reaches policy arenas through government and intergovernmental bodies, these tend to be technical, discipline-based papers which mostly diagnose problems in the current food system and identify *what* needs to change, very rarely focusing on *how* change happens or how to enable it.
- Deep collaboration and true co-production between stakeholders and researchers remain rare, even though studies involving authors from outside academia are linked to greater visibility and more policy references.

3 Barriers to progress at scale

Despite wide-ranging activity and strong changemaker engagement, progress towards food system transformation has stalled – falling short of the scale and pace needed to avert worsening health and climate crises.

Across geographies and sectors, changemakers encounter five overarching barriers or challenges. First, **structural power imbalances** give well-resourced actors greater influence over decision-making and greater capacity to resist change and resist change, while smaller stakeholders have limited influence. Second, **unfavourable policy and institutional frameworks**, which are hard to navigate, lead to poor coordination across sectors, unclear responsibilities and weak regulation, discouraging meaningful action. Third, **polarised public and political debates** around food create resistance to policies, especially on issues such as dietary change, and are intensified by concerns about cost and food security. Fourth, **fragmentation between practice and research communities** weakens progress: changemakers and researchers work in silos, lack trust and disagree on priorities and strategies, limiting collaboration. Fifth, there is a gap between knowledge and action with **evidence being impractical, inaccessible or inadequate**: while evidence on what to change exists, practical, accessible guidance on how to implement these changes is lacking. Research is often too technical, slow, fragmented and disconnected from real-world needs.

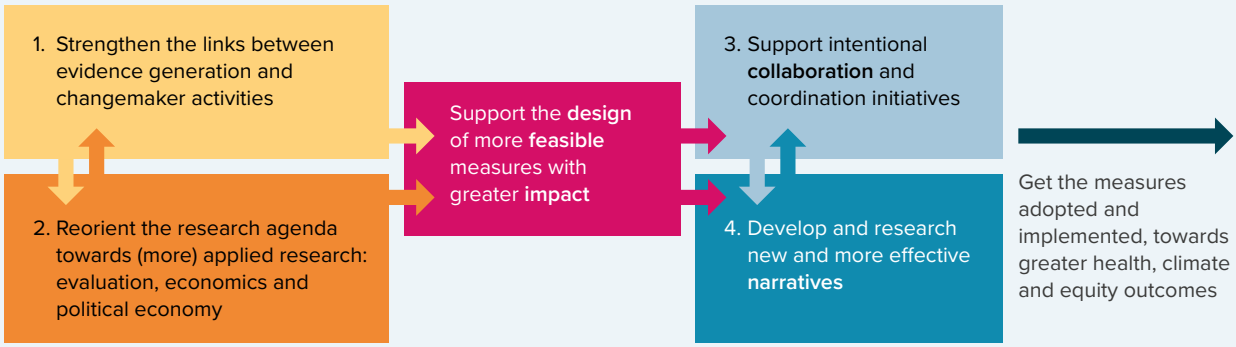
4 From needs to investment priorities: Recommendations for future funding

Four critical needs have surfaced in our research which, if met, could help changemakers overcome these barriers: (1) *reorienting research* agendas towards applied research (in economics, evaluation and politics) and research synthesis; (2) *strengthening the links between evidence generation and decision-making* at different levels; (3) *supporting more long-term, multi-actor* coordination, coproduction and collaborations and (4) *building new narratives and framings* that speak to multiple audiences.

In line with the recommended portfolio approach and the four investment priorities which underpin it (*impact*, *synergies*, *strategic gaps* and *risk-reward*), we can distinguish between two categories of recommendations. On the one hand are recommendations regarding *investment priorities* for the future, that relate to how to improve both the kind of and the way in which research is funded and carried out, to improve its value-add for changemakers and therefore their ability to deliver impact at scale and pace. On the other hand are concrete *investment recommendations* in terms of action areas and geographies.

The four *investment priorities* should build the foundation for and inform all new investments. They are designed to complement, support and reinforce each other, building capacity and knowledge over time that is more grounded in practical reality and therefore more likely to be taken up in practice and policy (see Figure 3). These priorities all relate to the **how** of our impact pathway: improving the research and funding landscape (what kind of research is funded and how research is done) and supporting more effective uptake, adoption and implementation of evidence in practice and policy (to deliver greater impact).

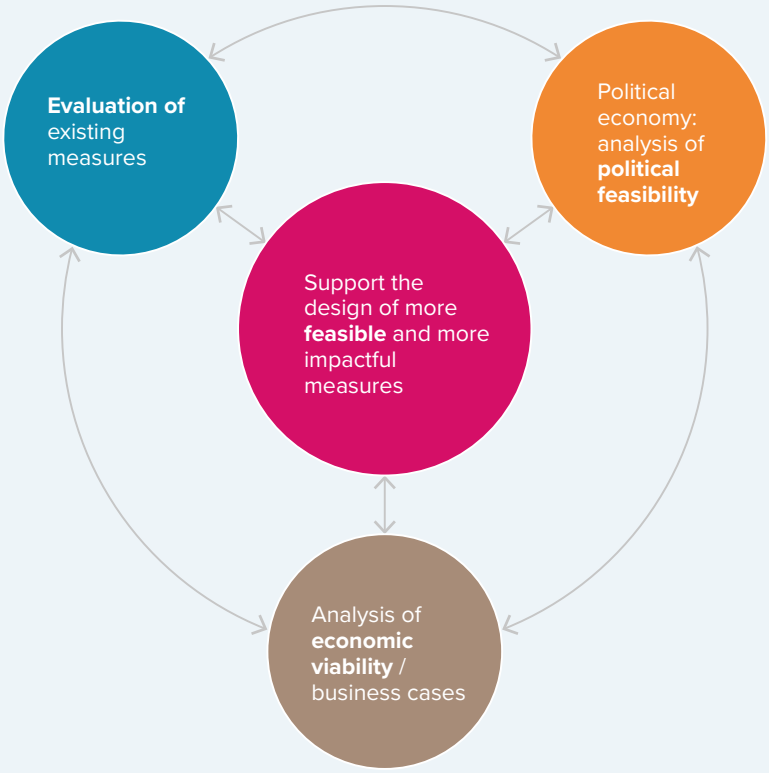
Figure 3: Synergies between the different needs in support of changemaker interventions. Source: Authors



The four investment priorities include:

- Reorienting the research agenda towards applied research and research synthesis, especially in three areas currently underfunded and underdeveloped. These are often perceived as less academically attractive, even if critical for real-world impact (see Figure 4). These three areas include:
  - **policy evaluation** to understand what works and why;
  - **economic analysis** of implementing changes to identify viable business models and financial barriers (going beyond a "true cost accounting" logic) and
  - **political (economy) analysis** that assesses feasibility, power dynamics and strategies to overcome resistance.

Figure 4: Three fields of applied research to support the design of more feasible and more impact-ful measures / interventions



- Strengthening the links between evidence and decision-making by (1) involving changemakers throughout the research process — from defining questions to shaping outputs – and by (2) translating research findings into practical, accessible formats (e.g. briefs, videos) tailored to different audiences.
- Supporting multi-actor and multi-sectoral collaboration to share knowledge, align efforts and co-develop strategies over the long-term. This requires time, trust, leadership and resources. Despite existing initiatives, collaboration remains underfunded and should involve a broader range of actors. Better coordination among funders could significantly enhance these efforts.

- Developing more effective narratives to influence public and political debates. Changemakers need stronger, evidence-based and co-developed messaging that addresses economic, political and social concerns while countering dominant narratives from powerful actors who oppose change, such as large food industry.

These four investment priorities apply differently to the seven different action areas and across geographies. The first set of concrete recommendations encompass **three action areas where immediate or short-term impacts can be achieved**: (i) supporting public procurement initiatives, especially in policy; (ii) the development and implementation of local food interventions and strategies and (iii) the need to support or even pressure retailers and food service providers to enable dietary shift. Specific recommendations include, for example:

- supporting the *evaluation* of past and existing public procurement and local food initiatives to identify stumbling blocks and how to overcome these;
- supporting *collaboration* between stakeholders or changemakers involved in public procurement and local food interventions, such as through the creation of *exchange platforms* between and within countries;
- further assessing the economic implications of a change in retail and food service offers (discounts, product placement and advertising) and developing stronger partnerships between retailers and food service providers, government actors and civil society organisations;
- cutting across all of these, supporting the establishment of a set of agreed upon and "usable" criteria to define what is and is not considered healthy and sustainable food, requiring rigorous *evidence synthesis*. But is a highly political and contentious task.

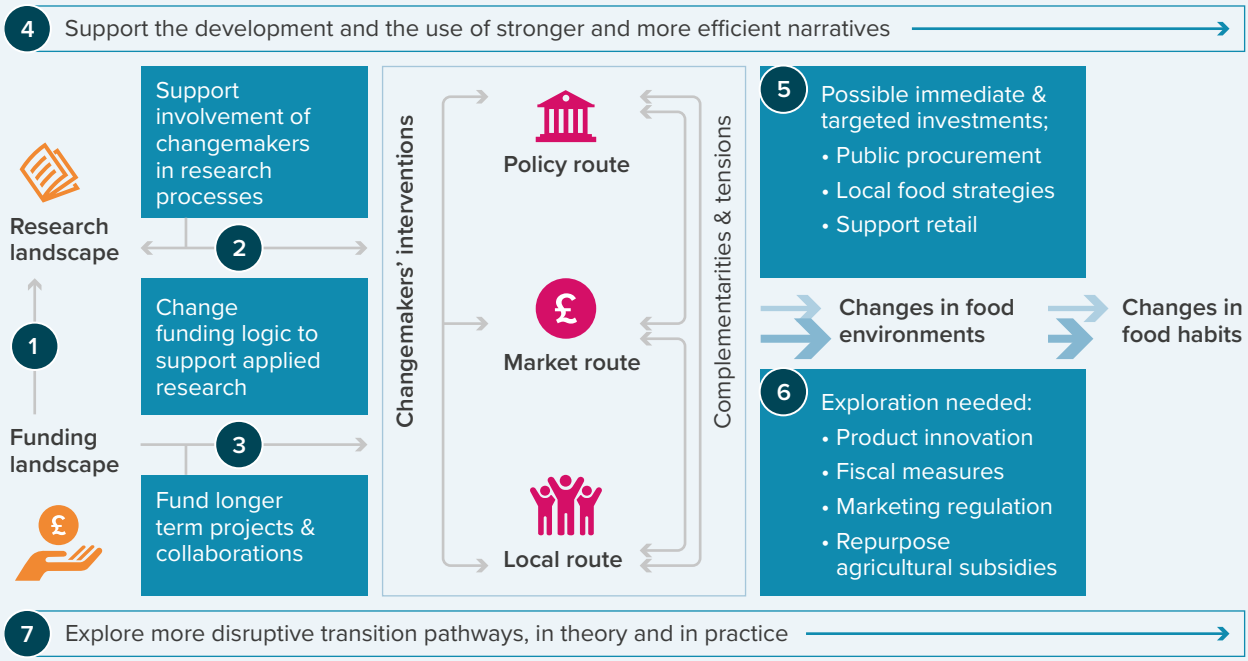
The second set of concrete recommendations pertains to four other action areas, where initial and smaller investments would help **identify potential opportunities for further (and larger) investments**:

- For *fiscal measures*, substantial evidence already exists on their cost-effectiveness. Much less has been invested in exploring the *political and economic implications and impacts* of introducing these measures in real-world conditions. Scoping studies could be funded in key countries to further assess their political feasibility and identify possible strategic pathways to introduce them.
- For *product innovation*, several funders are heavily investing in technological and regulatory aspects. Gaps persist, however, around the *socio-cultural* and *political* dimensions of introducing and scaling up alternatives to animal-sourced foods. One valuable opportunity for this is to scope more specific barriers and identify how to address them in equitable ways.
- For *marketing regulation*, practical case studies already exist, and evidence is emerging around observed outcomes. More evaluation work is needed to credibly assess effects and impacts on dietary change and consumption patterns, as well as economic and social consequences in both the short and long term.
- For *repurposing agricultural subsidies*, a lot of changemakers are heavily involved in both the EU and the UK, supported by a variety of funders and philanthropies.

Opportunities to support this are less clear, but would likely involve more research around political feasibility, assessment of existing interventions, translation and synthesis work of existing evidence and coordination, alignment and collaboration work.

The third set of concrete recommendations supports the need to invest over the long-term in research and activities which explore broader social and economic transformations beyond these seven action areas. This type of work would investigate deeper and more disruptive *pathways* to transformation (beyond defining a desirable end state), including how change happens and how it can be better enabled, allowing for different cultural and political realities. Such investment should include both empirical and theoretical work on different contentious social, economic and political topics and approaches, for example: on right-to-food approaches, competing social and economic values, scenario work around social impacts of food system shocks in different contexts and alternative food futures. It could be on topics that remain specific to the food field, e.g. investigate possible equity-based pathways to implement a "social security for food". It could also be on topics that connect with other sectors or fields such as renewing the social contract.

Figure 5: Recommendations, based on changemaker's needs



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Better understanding of how climate change affects health

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