

THE GLUTEN FREE DIET HOW MUCH DOES IT COST AND WHY DOES IT MATTER?

Coeliac UK report on the cost of gluten free
food in the current economic climate

March 2023





EXECUTIVE SUMMARY

We are in the midst of a cost of living crisis and with inflation at a 40 year high, spiralling energy costs and increasing uncertainty about the economy; many people are struggling. This is particularly true for people with coeliac disease, a serious autoimmune condition where the only current treatment is a medically prescribed gluten free diet. A diet that can be challenging to manage and requires staple gluten free substitute products for practical and nutritional reasons.

How has the current crisis affected the cost of staple gluten free products and what is the impact on the weekly shop? By understanding the true cost of maintaining a gluten free diet, in relation to a gluten containing one, we can shine a light on the additional challenges faced by the coeliac community and work towards a world where no life is limited by gluten. This report by Coeliac UK reveals the findings of its study on the prices of gluten free food within seven UK supermarkets from March-December 2022 and highlights actions that can be taken, alongside resources to aid the gluten free community.

KEY TAKEOUTS

Gluten free substitute foods have a key role in replacing those gluten containing foods that are typical of the UK diet, they are important for both practical reasons and their nutritional content. Eating rice or potatoes instead of bread can reduce iron and calcium intake by up to 96% and 93%, which is particularly important as people with coeliac disease are recommended to have a higher intake of calcium compared with the general population, due to previous or potential ongoing malabsorption.

A gluten free loaf of bread is on average **4.3 times more expensive** than a standard gluten containing loaf, whereas the cheapest gluten free loaf of bread is



Based on bread consumption the annual cost for white, brown and seeded bread for an adult on a gluten free diet compared with an adult on a gluten containing diet is £171 vs £41.

* Based on the Minimum Income Standard.

20%

more expensive

A weekly gluten free food shop can be as much as **20% more expensive** than a standard weekly food shop*

There are limited variety and budget options for all gluten free products which puts a disproportionate burden on those with the lowest incomes.

Coeliac UK works with policy makers, healthcare professionals and the food industry to improve the lives of people with coeliac disease across the UK to ensure no life is limited by gluten.



Shoppers will pay on average **double** for gluten free staple substitutes like pasta, flour, bread rolls, cereals

WHAT IS COELIAC DISEASE?

Coeliac disease is a serious autoimmune condition, affecting around 1 in every 100 people. Symptoms are wide ranging^[1] but can include bloating, stomach cramps, vomiting, diarrhoea and tiredness. Extra intestinal symptoms can be very diverse and include anaemia, low bone density, skin rashes, recurrent mouth ulcers, loss of balance, sensory symptoms, cognitive slowing, anxiety and depression^[2].

There is no cure for the condition and the only treatment is a strict gluten free diet for life. When

a person with coeliac disease eats gluten, even a crumb, it can cause debilitating symptoms and in the long term, gut damage.

Following a medically prescribed gluten free diet means you need to avoid eating the gluten containing cereals wheat, barley, and rye and for some people oats too. Complete replacement of gluten containing foods is not easy as these cereals are the main ingredients of many staple foods which constitute a significant proportion of the average UK diet. Gluten free substitute foods are important for both practical reasons and for their nutritional contribution to the diet.



“I would never rely on being able to find something, we take a packed lunch on every single trip out!”

Mum of child with coeliac disease, North West England

Why can't you just swap bread for rice and potatoes?

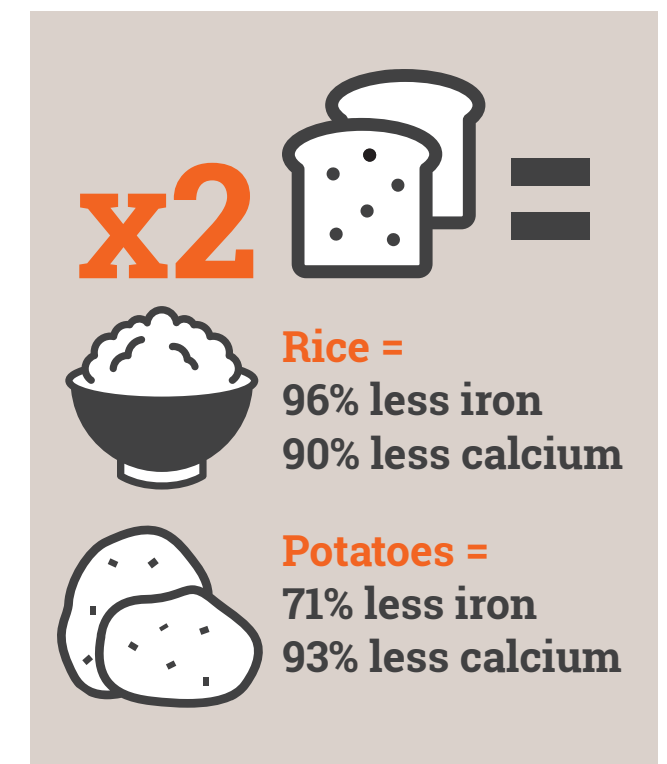
There are many alternative foods to bread and pasta, that by nature do not contain gluten, like rice and potatoes, but it is unrealistic for someone to cut bread completely from their diet and replace it with these. Complete replacement of gluten containing staple foods is not easy and gluten free substitute foods are important for both practical reasons and for their nutritional contribution to the diet.

For example, replacing two slices of gluten free bread with a portion of rice containing the same number of calories would reduce the iron content by 96% and the calcium content by 90%. Similarly, replacing gluten free bread with a portion of peeled, boiled potatoes containing the same number of calories would reduce the iron content by 71% and the calcium content by 93%^[3,4].

People with coeliac disease are recommended to have a higher intake of calcium compared with the general population due to previous or potential ongoing malabsorption^[5]. Research conducted by Coeliac UK on nutritional intake (Coeliac Diet and Nutrition Survey; CDNS) found that people with coeliac disease eat a similar amount of bread to the general population. For example, the CDNS^[4] found that adults

under 65 years, with coeliac disease eat on average 77 g/day of white/seeded/brown bread compared with 80 g/day reported for the general population in the Government's National Diet and Nutrition Survey^[6].

The gluten free diet can be even more difficult to manage when out and about. On many occasions it is not catered for, and availability can be unreliable requiring people to prepare food to take with them - the most practical solution being something like a sandwich.



RESEARCH RATIONALE

Even before the current crisis, people with coeliac disease faced the obstacle of paying a higher price to access the gluten free food essential for their health.

Previously published research has shown that gluten free bread and other gluten free substitute products range from two to four times more expensive than their gluten containing equivalents^[7]. Between 2015 and 2019, the relative price differential between gluten containing and gluten free produce actually increased across all UK supermarkets^[7].

In the past, Coeliac UK has carried out research looking at the cost of bread and the gluten free price index, where prices of gluten free substitutes were tracked against the gluten containing equivalent products and to examine the impact of inflation. This time the research went a step further and not only looked at the cost of gluten



free bread and individual staple products but also the cost and impact of a weekly gluten free food shop. This way, Coeliac UK might better grasp the full cost burden of maintaining a gluten free diet in these challenging times. After all, for those with a diagnosis of coeliac disease, sticking to a strict gluten free diet is not a choice but a medically prescribed diet and essential for health and wellbeing.

THE RESEARCH

Coeliac UK undertook research to compare the prices of gluten free products and their gluten containing equivalents from across UK major supermarkets. The analysis included data sourced from seven different supermarket websites but only five of these provided sufficient information beyond examining the cost of bread; for the range of substitute products and the weekly food shop, five supermarkets were used.

By measuring the cost of maintaining a gluten free diet, in relation to a standard gluten containing one, the additional challenges faced by those with coeliac disease can be better appreciated. This is evidence that Coeliac UK can use when advocating for the coeliac community.

How the data was collected

The Coeliac UK Evidence and Policy team collected the prices of all gluten free bread and key staple products between March 2022 and December 2022. Historical data from a previous Coeliac UK costing project was also used. Prices and pack size by weight were taken from the websites of the major supermarkets¹. A representative price per 100g was calculated for all items so the products could be easily compared.

Bread

Every 3 months since March 2022 the price of brown/wholemeal, white and seeded loaf bread was collected. Gluten free loaves are much smaller in size than gluten containing loaves so to enable a comparison, the average price was calculated by taking the average price per 100g of each loaf of gluten free bread compared to the average price per 100g across all gluten containing equivalent loaves. Coeliac UK compared prices of 59 gluten free loaves with an equivalent

66 gluten containing loaves². The data were taken from the websites of seven different supermarket chains every three months. This is to give an understanding of price disparity over time and see whether gluten free bread prices are increasing at the same rate as gluten containing bread. Looking at bread over time, the prices were indexed to 2015, to measure the real trend of prices and not the effect of inflation.



Other staple substitute foods

These products are an important and significant contributor to the UK diet and include pasta, plain flour, bread rolls, cereals, cereal bars, and crackers. Prices were collected throughout October 2022 from the websites of five different supermarket chains. These staple products were included in the research as traditionally, these were on prescription in England until 2017 and are still available in Scotland, Wales, and Northern Ireland. Here, the price ratios were compared.

Impact on a weekly food shop

To understand the true cost of maintaining a strict gluten free diet, all food items within a weekly food shop were costed, in addition to the gluten free staple substitutes. The weekly food shop is based on a Minimum Income Standard (MIS) basket. We selected two examples, one basket for an adult male, the other for an adult female, as part of a reasonably costed, adequately nutritious diet.

These two food shopping baskets of around 70 items each, based on the MIS, were developed by Loughborough University's Centre for Research in Social Policy (CRSP). CRSP developed the basket by holding discussion groups with multiple groups of working age adults. These discussions then formed the basis of case study menus which were altered by a nutritionist so that they met nutritional standards, thereby giving the minimum amount you would need to have a socially accepted, suitably nutritious diet. Despite this approach, the households in the poorest 10% of the UK spend £22.45 per week on grocery food and non-alcoholic drink shopping according to the Government's Family Food Survey (2020). It is unlikely that this food shop is adequately nutritious^[8].

The Coeliac UK study adapted this basket for five supermarkets and collected data on 11 October 2022. This basket also considers that the whole food item may not be eaten within a week and so assigns a consumption weight to each product. Due to men and women having different recommended calorie intakes, there are different baskets for males and females.



¹ Special offers and discounts were beyond the scope of this analysis therefore not included. There was no regional influence when prices were taken from each supermarket website.

² It should be noted that the 59 and 66 loaves of bread refer to the number of prices taken as opposed to distinct products. e.g. loaf X may have been available in more than one supermarket and as such more than one price will have been taken.

THE FINDINGS

A gluten free loaf of bread is on average 4.3 times more expensive than a gluten containing loaf

In December 2022, the average cost of a gluten free loaf was 61p per 100g whereas the average cost for a gluten containing loaf was just 14p per 100g.

This price difference has remained the same over the past 11 years, even though the range of gluten free bread available has increased.



Using individual bread consumption data for an adult under 65 years, taken from the NDNS and CDNS, the annual cost for white and brown/seeded bread for someone on a gluten free diet compared with someone on a gluten containing diet is £171 vs £41.

The cheapest gluten free loaf of bread is 7.2 times more expensive than the cheapest gluten containing loaf

While the cheapest gluten containing loaf is less than 5p per 100g, you will have to pay over 35p per 100g for a gluten free equivalent 'budget' loaf. That is the minimum price per 100g you can pay for a loaf of bread within the dataset from any of the seven supermarkets included in the research.

While the cheapest gluten containing loaf has not experienced any significant increase and hovered around 5p per 100g since recording of prices commenced in March 2022, the results show that the cheapest gluten free loaf has been increasing at the same rate as other items in this analysis – for example, from March 2022 to December 2022, the cheapest loaf of gluten free

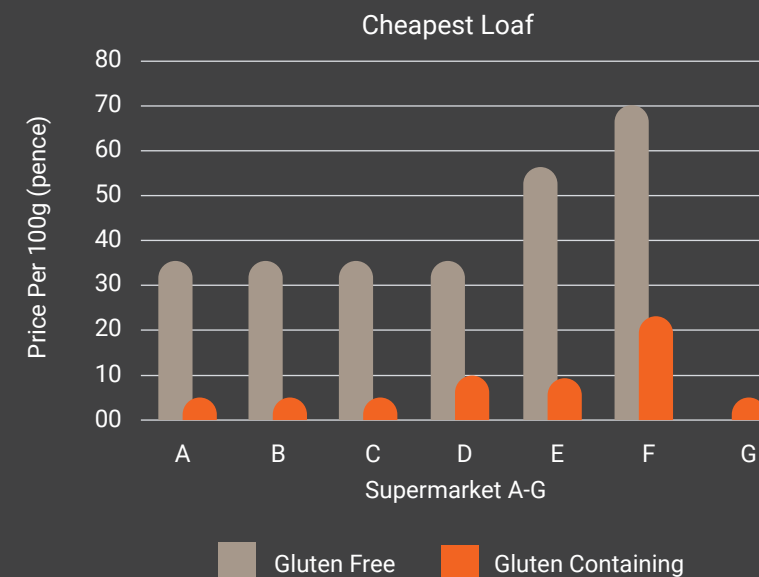


bread has increased by 7.3p per 100g while the equivalent gluten containing loaf has increased by 0.38p per 100g.

At each supermarket, it is possible to buy budget gluten containing bread but unfortunately, that is not true for gluten free. You may find a gluten free loaf for 35p per 100g at some supermarkets, but others do not sell a 'budget' gluten free loaf. It also might be the case that your local supermarket doesn't even stock this loaf. This can become a real problem if you don't have access to a bigger supermarket or the budget gluten free bread is sold out in your local store.

“For an average loaf of gluten free bread to cost more than four times a normal (gluten containing) loaf will only lead to people with coeliac disease being unable to stick to their gluten free diet.”

Professor David Sanders, Consultant Gastroenterologist Royal Hallamshire Hospital & the University of Sheffield



Note: Supermarket G does not have gluten free bread listed on its website, so no gluten free prices could be included.

So how easy is it to access gluten free staple products?

Even if a store sells a loaf of gluten free bread at the lower end of the cost scale, is it always available when you wish to buy it? Can you easily get to a supermarket that stocks gluten free products? Members of the coeliac community have expressed that sometimes it's hard to find the gluten free products they are looking for and it means that they must go to multiple shops to find the products they need. According to Coeliac UK's Shopping Habits survey from 2022^[9], which was completed by over 6500 people, 84% of respondents admitted to visiting more than one retailer to complete their gluten free shopping requirements and 90% said they experienced problems with products not being available when they wanted to purchase them^[9].

84% of shoppers need to visit more than one store

90% of shoppers experienced out of stock issues

Accessibility is also a challenge, particularly amongst rural communities and deprived areas where there may be more convenience and budget stores. This disproportionately impacts poor socioeconomic cohorts, the elderly, and physically disabled^[10]. In addition to the cost project, Coeliac UK is further focusing on access and availability, results of which will be shared in another report later in the year.

“Supermarkets having more/ less or different stock in different stores is a pain. I can visit 4 supermarkets to buy everything on my list either due to them not stocking it or having no stock. I have had coeliac disease for 4 months and I am shocked at how much I have to spend.”

Anon, Yorkshire and the Humber

THE INCREASED COST OF GLUTEN FREE STAPLE SUBSTITUTE PRODUCTS

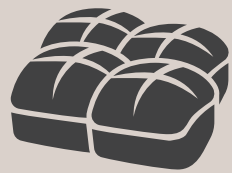
You will pay on average double for gluten free staple substitutes like pasta, flour, bread rolls, cereals

Staple substitute products, which constitute a significant proportion of the UK standard diet, cost on average double the amount of gluten containing equivalents³. The average price per 100g of gluten containing staple products was compared with gluten free staple products from five supermarkets. Specifically, gluten free flour is 2.1 times more expensive than standard wheat flour and at most supermarkets, there is only one brand available. There is reduced variety amongst gluten free products and there are fewer budget options for those on a gluten free diet; this places a greater financial burden on those with low incomes.

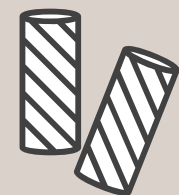
How many more times expensive for the gluten free equivalent?



Plain Flour:
2.1



Bread Rolls:
2.3



Pasta:
1.9



Crackers:
2.5



Cereal Bars:
1.8



A gluten free food shop can be as much as 20% more expensive than a standard food shop

The cost difference of a weekly food shop varies significantly across supermarkets. For example, there are two supermarkets where it will only cost 3% more for a gluten free food shop compared to a gluten containing one, providing the availability is good. It should be borne in mind that this is only for a single person, male or female, so it could potentially cost a lot more where there is more than one person in the household on a gluten free diet.

This can often be the case as first degree family relatives of someone with coeliac disease have an increased risk, 1 in 10, as opposed to 1 in 100 in the general population, of having coeliac disease themselves.

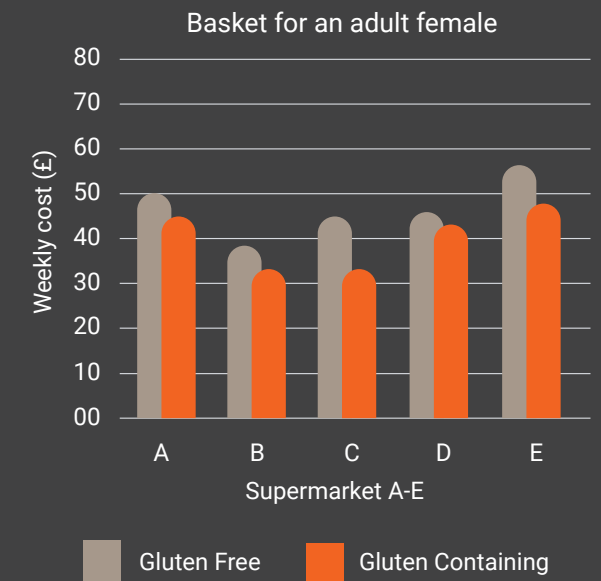
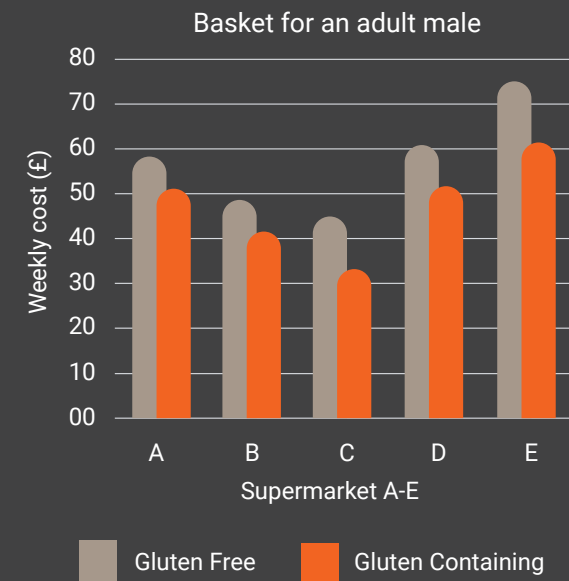


Figure 2

The male and female shopping baskets differ due to different energy requirements for males and females.

Note: five supermarkets were used for weekly food shop analysis.

There are limited variety and budget options for all gluten free products which puts a disproportionate burden on those with the lowest incomes.

This basket also assumes that products can be purchased from a single store, but that is not always the reality; many of the coeliac community must visit multiple shops to be able to buy all their gluten free products or face going without certain staple products.

"I'm retired, on a small pension, I wish gluten free foods like bread, pasta etc were cheaper!"
Dianna, South East England

"The financial burden on the families that I work with is huge. Providing a gluten free diet for children can already be extremely stressful as there can often be a lot of anxiety in children due to not wanting to be different from their peers, but also feeling very anxious about trying new foods. If the children all pick up on how much of a strain it is for their parents to provide them with a gluten free diet, this is an added burden to a child who has already been through enough. This report illustrates how devastatingly expensive keeping to the gluten free diet can be for our families, adding to their stress and burden."

Dr Sophie Velleman, Specialist Clinical Psychologist,
Bristol Royal Hospital for Children

³ This does not include gluten free loaves of bread which is reported separately.

IMPACT OF THE COST OF GLUTEN FREE FOOD

Higher prices for gluten free bread and staple products can have a significant impact on the cost of the weekly shop. This would be a challenge at the best of times but in the context of a cost of living crisis, it raises concerns that many people with coeliac disease could struggle to afford their gluten free diet, the only treatment for the condition. According to the Government, the poorest 10% of the UK population normally only spends £22.45 per week on their food shopping^[8]. That amount is insufficient to ensure the diet is adequately nutritious^[9]. This is particularly concerning in view of Coeliac UK's findings.

Coeliac UK has heard from concerned members who are struggling to be able to afford to buy gluten free food and worried about the impact this might have on their health.

As food insecurity increases, the cost of living crisis could become a cost of health crisis for many.

The situation is only likely to become more challenging with increasing inflation. Coeliac UK will continue to monitor prices to see how this impacts the price of gluten free food going forward. It is clear things are changing quickly at

the moment. This comes at a time when some areas of England have stopped prescribing gluten free bread and flour to those with coeliac disease, which pushes the economic burden further onto the individual or household.

“At a time when the cost of living is rising and people are having to identify any possible savings, the added expense of having a diagnosis of coeliac disease may become unsupportable, especially for the most disadvantaged in our society.”

Dr Jeremy Woodward, Consultant Gastroenterologist, Addenbrooke's Hospital



WHY IS GLUTEN FREE MORE EXPENSIVE?

There are several factors that may influence the price of gluten free food products. These include:

Production: to ensure that gluten free food is produced to a high standard, and with no risk of cross contamination, there are increased costs involved in the production process and the production environment itself.

Batch sizes: gluten free foods are manufactured in smaller quantities as the demand for them is less than that for gluten containing and this has associated increased cost.

Gluten testing: costs are involved in analysing products to make sure the gluten content is below the legal threshold for making a gluten free claim, which is no more than 20 parts per million of gluten.

Product development: there are challenges to removing gluten from products and manufacturers explore and invest in new technologies, recipes, and methods.

Ingredients: gluten free products are often made with a larger combination of ingredients, compared with gluten containing equivalents, to achieve the similar product characteristics of those made with

the gluten containing grains wheat, barley, and rye, such as bread, crackers and breakfast cereals. These alternative ingredients can also be more expensive, which influences the cost of the gluten free product.

Packaging: segregated packaging areas and differences in shelf life.

Transport, distribution and retail: there are a number of further costs associated with getting the product from the factory floor to the supermarket shelf. This includes transport, labour, logistics and supply chain costs. The smaller the volumes, the larger some of these costs can be.

Coeliac UK recognises there are additional costs to consider when producing gluten free products but is calling on the food industry throughout the food chain to make gluten free food more affordable for consumers.

ADVOCATING FOR OUR COMMUNITY

At Coeliac UK, for over 50 years we've been helping people with coeliac disease and other gluten related conditions live happier, healthier lives. We do this by striving for better gluten free food in more places, providing independent, trustworthy advice and support to our community, and funding crucial research to not only manage the impacts of gluten, but also find the answers to coeliac disease. And we do it all so that one day, no one's life will be limited by gluten.

By conducting this research, we have been able to establish solid benchmarks for the cost of gluten free staple foods and the wider impact of the gluten free diet on the cost of the weekly food shop. This evidence will be critical in underpinning the charity's advocacy work as we strive to ensure no member of our community is left behind.

The additional burden we have identified, highlights the urgent need for action. With this in mind, we're calling on policy makers and the food industry to join with us to help support those with coeliac disease and ensure they can access the food they need to treat their condition.

Gluten free prescriptions:

We believe gluten free prescriptions have a critical role to play in supporting people with coeliac disease to maintain a strict gluten free diet, and we will continue to fight to protect this service. We welcome the commitment to ongoing provision from commissioners and the devolved administrations across Wales, Scotland, and Northern Ireland and recognise the support offered by many Integrated Care Boards in England.

However, it cannot be right that for so many others with coeliac disease living in England, access to such support is denied. Not because of need or means but by accident of geography alone. When the Department for Health and Social Care (DHSC) carried out a national consultation on the future of gluten free prescribing in England in 2017, they heard from an unprecedented number (almost 8,000) of clinicians, professional bodies and patients. Their report rightly recognised the importance of maintaining access to bread and flour mixes for all those with a diagnosis of coeliac disease, with



the Secretary of State for Health & Social Care opting to retain gluten free bread and flour on prescription in England as a result.

Unfortunately, it was left to the discretion of local commissioners to set more restrictive policies and in recent years many have chosen to limit or withdraw gluten free prescribing altogether, often in the face of public opposition. Coeliac UK will be petitioning the DHSC to call for clearer national guidance for commissioners in England, considering the significant pressures on the coeliac community. We'll be calling on the public to lend their voice to these efforts to ensure no one is denied the support they need.

"I was diagnosed with coeliac disease when I was 9 and have been on a gluten free diet for 12 years. Before I was diagnosed, I would get stomach pains but now if I eat gluten by accident, I am usually sick. Having gluten free staples on prescription makes it so much easier and cheaper to do my weekly shopping. I don't have to worry whether there will be gluten free products in store. It also really helps offset the cost of my weekly shops because these are generally the most expensive items I would buy."

Quinn, Eastern Scotland

Gluten free in the supermarkets:

As our research has shown, the weekly food shop can cost as much as 20% more for an individual with coeliac disease which can be even more for families with more than one person diagnosed. We need to better understand why gluten free products cost so much more in the supermarket and we will continue to work with the food industry to address this. This is an ongoing project, our aim being to identify new ways to support the community to access the gluten free staple products they need, by ensuring gluten free products are widely available and affordable across the UK.

Food banks and third sector partners:

Reliance on food banks is increasing, and this trend is only likely to continue for the foreseeable future. For those in the coeliac community who may need to rely on the support of food banks, we will continue to work with third sector partners and policymakers to ensure they too

can have access to products to support their gluten free diet.

Resources for our community:

For those needing support, we have resources on our website www.coeliac.org.uk/cost-gf-food to help with maintaining a gluten free diet on a budget and information about prescribing policies by area. We also have a **Helpline 0333 332 2033** for advice from our friendly Helpline team.

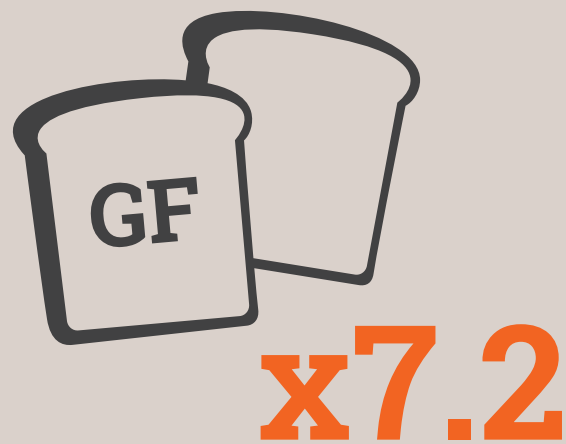
Get involved:

At Coeliac UK we are only as strong as those we represent. So, we will be inviting our members, supporters and the wider community to join us in this campaign by pledging your support. Complete the pledge form on our website: www.coeliac.org.uk/join-our-campaign and help us by writing letters to MPs, sharing our posts on social media and uploading your photo for our 'Wall of Support.' Together we can ensure no-one's life is limited by gluten.

THE GLUTEN FREE DIET: WHAT DOES IT COST AND WHY DOES IT MATTER?



This provides a summary of key findings from a study by Coeliac UK on the prices of gluten free food across UK supermarkets between March-December 2022.

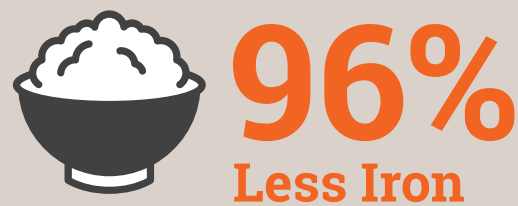


The cheapest gluten free loaf of bread is **x 7.2 more expensive** than the cheapest gluten containing loaf

£171 vs £41

Based on bread consumption the annual cost for white, brown and seeded bread for an adult on a gluten free diet compared with an adult on a gluten containing diet is **£171 vs £41**

84% of shoppers need to visit more than one store to complete their weekly gluten free food shop



Eating **rice** or **potatoes** instead of bread can reduce iron and calcium intake by up to 96% and 93%, particularly important as people with coeliac disease are recommended to have a higher intake of calcium compared with the general population, due to previous or potential ongoing malabsorption

20% more expensive

A weekly gluten free food shop can be as much as **20% more expensive** than a standard weekly food shop

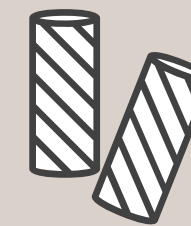


x4.3

A gluten free loaf of bread is on average **4.3 times more expensive** than a standard gluten containing loaf.

90% of shoppers experienced out of stock issues

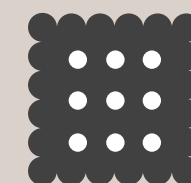
How many more times expensive for the gluten free equivalent?



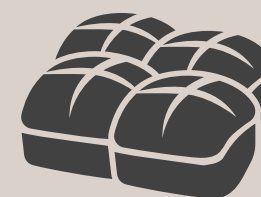
Pasta:
1.9



Plain Flour:
2.1



Crackers:
2.5



Bread Rolls:
2.3



Cereal Bars:
1.8

Information sourced from retailer websites. Seven different supermarkets for bread, only five with data for the range of staples substitutes and the weekly food shop. Prices of bread were collected every three months between March-December 2022 and staple substitutes collected throughout October 2022. Weekly food shop based on Minimum Income Standard (MIS) basket, developed by Loughborough University's Centre of Research in Social Policy. The basket represents a reasonably costed, adequately nutritious diet, prices collected 11 October 2022.

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Acknowledgments:

Coeliac UK would like to thank Abigail Davies from Loughborough University's Centre for Research in Social Policy and volunteers Quinn, Janice, Lara, and Shahina for all their support.

Tristan Humphreys, Head of Advocacy, commented:

"As the cost of living crisis shows no sign of abating, Coeliac UK has heard from concerned members who are struggling to be able to afford to buy gluten free food and worried about the impact this might have on their health. As food insecurity increases, the cost of living crisis could become a cost of health crisis for many.

For those with a diagnosis of coeliac disease, following a strict gluten free diet is not a choice but is a medically prescribed diet and is essential for their health. Our report reveals that people with coeliac disease are being disproportionately affected - a weekly food shop can cost as much as 20% more for an individual with coeliac disease, which can be an even greater burden for families with more than one person diagnosed.

We're calling on policy makers and the food industry to join with us to help support those with coeliac disease and ensure they can access the food they need to treat their condition."

coeliacuk
live well **gluten free**

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