

THE GLUTEN FREE DIET WHAT DOES IT COST AND WHY DOES IT MATTER? 2024 UPDATE

An updated Coeliac UK report on the cost, access and availability of gluten free food in the current economic climate.

June 2024



EXECUTIVE SUMMARY

Our latest research into the cost of gluten free food shows that while overall food inflation has reduced over the past two years, those with coeliac disease – for whom it is essential they maintain a gluten free diet to stay well - are still facing a huge additional burden both in terms of cost and availability. This updated report presents the findings of a research study comparing the prices of gluten free products and their gluten containing equivalents across major UK supermarkets. The research also highlights findings from the Coeliac UK cost and availability supermarket survey which recorded over 1,000 shopping trips from the community. The report outlines the actions that need to be taken to create a meaningful change for the coeliac community.

In March 2023, Coeliac UK published the report 'The gluten free diet: How much does it cost and why does it matter?' as part of a campaign to make gluten free food more affordable and accessible. The report intended to provide a snapshot of the true cost of maintaining a gluten free diet and shockingly confirmed that the cheapest loaf of gluten free bread cost more than 7 times the price of gluten containing equivalents gram for gram. It was also clear that accessibility of gluten free food is a huge challenge, particularly amongst rural communities and deprived areas where there may be more convenience and budget stores.

Coeliac disease is a serious autoimmune condition, affecting around 1 in every 100 people. Symptoms are wide ranging 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, peripheral neuropathy, cognitive slowing, anxiety and depression. There is no cure for the condition and the only treatment is a strict gluten free diet for life.

“Coeliac disease is not a diagnosis anyone would want even without the additional financial burden laid out in this report. Unfortunately, as a clinician, I’m seeing more and more patients who simply cannot afford the gluten free staple foods they need to treat their condition. People have a right to high quality nutrition at reasonable prices – significant numbers of coeliac patients are now being forced into a situation where they have to forgo the only treatment that makes them better (gluten free food) or go hungry. This is a significant public health issue and requires urgent action”



Dr Gerry Robins, Consultant Gastroenterologist, York Hospital



KEY TAKEOUTS

Failure to adhere to a gluten free diet when you live with coeliac disease can have serious consequences and gluten free substitute foods play 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. For example, eating rice or potatoes instead of white 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.

Those on the lowest incomes are hit hardest by this additional cost with the cheapest gluten free loaf continuing to be significantly more expensive than a gluten containing one. The limited variety and budget options for gluten free products place further disproportionate burden on this group.



35%

more expensive

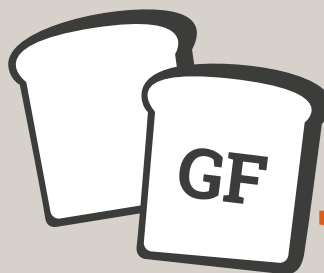
A full weekly food shop suitable for a gluten free diet can be as much as **35% more expensive** than a standard gluten containing weekly food shop*



x4.5

more expensive

A gluten free loaf of bread is on average **4.5 times more expensive** than a standard gluten containing loaf gram for gram



x6.1

more expensive

Whereas the cheapest gluten free loaf of bread is **6.1 times more expensive** than the cheapest gluten containing loaf gram for gram

* Based on the Minimum Income Standard.

A Coeliac UK survey of over 1,000 respondents found that many people with coeliac disease were opting to risk consuming gluten for cost reasons. This is particularly concerning as such individuals are potentially jeopardising their health as a result.

4%

4 in every 100 people were actively eating gluten out of cost concerns and nearly a third were opting to eat products with may contain cereals containing gluten statements for the same reason



77%

Almost 8 in 10 of respondents reported struggling to afford gluten free products

OUT OF STOCK

When shopping online, where substitutes were allowed or provided in

1 in 3 cases

they were not suitable for a gluten free diet



The survey also highlighted the additional barriers of access and availability.

87%

Nearly 9 in 10 respondents described problems with overall availability of products



1,2,3+ shops

86%

Nearly 9 in 10 respondents were unable to fulfil all their needs at one shop

70%



7 in 10 people said shopping gluten free 'adversely affects their quality of life'

COST, ACCESS AND AVAILABILITY CAMPAIGN

In March 2023, Coeliac UK launched its campaign to make gluten free food more affordable and accessible. Using the latest data on the cost of gluten free staple substitute products, it highlighted the challenges facing those with coeliac disease during the cost of living crisis.

Campaign objectives:

- To ensure there is access to support on the NHS for people with coeliac disease who need help to maintain their gluten free diet
- To ensure key decision makers across the UK are committed to policy responses that enable access to gluten free provision for those who need it
- To work with the food industry to ensure gluten free staples are affordable and available for those who need them
- To increase awareness of the impact the cost of living crisis is having on the coeliac community

The campaign was promoted to the Coeliac UK community across social media channels, via emails and through PR, including TV and radio and the response has been incredibly positive. Thousands of people pledged their support for the campaign, writing to elected representatives and local commissioners or sharing the message on social media.



Website and social media engagement:

Over **22,000** campaign page views

Over **2000** report downloads



Over **360,000** impressions on Coeliac UK social media channels

Over **35,000** engagements on Coeliac UK social media channels



8.4% engagement rate on Coeliac UK social media channels (+90% increase vs Coeliac UK average engagement)

Comments from our community:



"Any help to make the gluten free diet more affordable is definitely appreciated!"

"This is brilliant! I'm grateful for the prescription we get for my daughter but it's not enough, we need more to help!"

"Yes - so much hard work has gone into this and it's so so important. Gluten free is not a choice for most people so it needs to be more affordable and more accessible. Let's go!!"

"Fantastic work - the findings are not surprising to those of us with coeliac disease, but an important issue that needs shouting about and there could definitely be more done to help people with coeliac disease who are struggling to afford the staples."

PR coverage



Cost of Living: NI woman with coeliac disease says food bill has doubled

24 July 2023

MailOnline

People suffering from food allergies are being forced to endure painful symptoms due to unaffordable 'free-from' products, study warns

• Shoppers pay double for gluten-free essentials like pasta, flour and bread



'Free-from' food increasingly unaffordable in UK, experts warn

Patients, especially in England, who need it due to allergies and health issues are left with painful symptoms or permanent damage

How higher costs affect those with special dietary needs



METRO

Home - Lifestyle - Health

'It's not fair that we have to pay a premium': Woman with coeliac disease reveals struggles of pricey gluten-free food during cost of living crisis

Comment

The Grocer

HEALTH

Gluten-free diets a fifth more expensive, claims Coeliac UK

By Sam Quinn | 21 March 2023



1 Comment

Fighting for gluten free prescriptions in England

Gluten free prescriptions play a critical role in supporting people with coeliac disease to maintain a gluten free diet and stay well, and as part of the campaign we shared the latest cost data with commissioners across the country.

A number of Integrated Care Boards (ICBs) have taken on board the important evidence within the previous report resulting in:

- NHS South Yorkshire ICB chose to align its gluten free prescribing guidelines to the Coeliac UK England recommendations for all those with a diagnosis of coeliac disease across Barnsley, Doncaster, Rotherham, and Sheffield.
- During 2023, Kent and Medway ICB and South West London ICB also decided to re-instate gluten free prescribing to people with coeliac disease across West Kent, Croydon, Kingston, Merton and Richmond.

Not all policy change has been so positive and a number of ICBs have chosen to withdraw existing provision in spite of the evidence we presented and the views of patient groups. In some cases, this has meant a failure to meaningfully take account of the findings of public consultations and in other cases, no consultation at all. Most alarmingly of all, some ICBs have pointed to improved gluten free provision in food banks as a mitigation against gluten free prescription withdrawal. There is clearly still a lot of work to do, and we continue to call for renewed national guidance from NHS England.

Working with the food industry to secure urgent support

In our last report we invited the food industry to work with us to tackle the challenge of cost, access and availability and we have been encouraged by many of the discussions we've had in the interim. Coeliac UK has met with several gluten free manufacturers and retail representatives. Whilst we recognise the significant costs associated with producing gluten free staple substitute products, the existing increased cost, coupled with access and availability challenges poses a considerable barrier for the coeliac community. We welcome the support we've had from industry to date, it must however mark the beginning and not the end of the journey and we call on the industry to commit to providing key gluten free staple products in store at an affordable price.

"At Tesco we understand the challenges our customers face living with coeliac disease and are committed to making gluten-free foods more affordable and easily available. Recognising the cost challenges faced by our customers with coeliac disease, we continuously strive to deliver value through our extensive own-brand and branded ranges. We've reduced the prices of selected everyday Free From staples to match their main aisle equivalents and offer promotions throughout the year. Most recently, we ran a two-week 20% discount on all Free From foods (Own Brand and Brands), currently available in all our stores and online."

Statement from Tesco

'The Gluten Free Industry Association (GFIA) stands in support of the Coeliac UK Cost Report, recognising its invaluable insights into the challenges faced by individuals living with coeliac disease. Through collaborative efforts with Coeliac UK, the GFIA and its members aim to promote accessibility, and continue to provide high quality, safe gluten-free products to ensure a better future for the coeliac community.'

Paddy Cronin – Chair, Gluten Free Industry Association (GFIA)

The Gluten Free Industry Association (GFIA): The GFIA represents the UK's leading gluten free manufacturers, which includes; Nairn's Oatcakes, Dr Schaer, Genius Foods Ltd, Warburtons, Juvela / Hero UK, My Gluten Free Bakery, Morning Foods, Hamlyns of Scotland, Bells of Lazonby Ltd, Sleaford Quality Foods Ltd, Ecotone and Perkier.

GLUTEN FREE

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, peripheral neuropathy, 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.

The importance of a gluten free diet

The gluten free diet is the only treatment for coeliac disease. 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%^[3,4], 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^[5].

Long term complications associated with non-adherence to the gluten free diet will affect the patient's quality of life and result in financial implications for the NHS.

"I never want my girls to feel like they are missing out, but availability and choice often means they can't enjoy the same experiences as their friends. When we go out for day trips, we never feel comfortable that there will be gluten free food readily available. And the food that is available is always so much more expensive."

- Kate Powell, Mum of two daughters with coeliac disease, Hampshire



THE RESEARCH

Coeliac UK undertook research to compare the prices of gluten free products and their gluten containing equivalents from across major UK supermarkets. 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 understood.

How the data was collected

The prices of all bread, staple substitute products and shopping basket items were collected between March 2022 and March 2024. Prices and pack size by weight were taken from the websites of the major supermarkets. 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 has been collected. 60 gluten free loaves were compared with an equivalent 64 gluten containing loaves. The data was taken from the websites of seven different supermarket chains.

Other staple substitute foods

Staple substitute products include pasta, plain flour, bread rolls, cereals and crackers. Staple products were taken from five supermarkets every six months, updated last in March 2024.

The weekly food shop

To put the cost burden of gluten free staple products into perspective, food baskets were also analysed. The weekly food shop is based

on a Minimum Income Standard (MIS) basket. Two example baskets, one 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, contain everything you would need to buy for a week of food including ingredients for meals. The two baskets are separate due to different recommended calorie intakes and weights assigned to each food item as the whole item may not be eaten within a week. The MIS basket was developed by Loughborough University's Centre for Research in Social Policy (CRSP)¹. Gluten free and gluten containing baskets were adapted for five supermarkets using supermarket websites. The gluten free food shop is a basket that is suitable for someone on a gluten free diet and includes items that are labelled gluten free, items that naturally don't contain gluten or items that do not have any precautionary allergen labelling for cereals containing gluten.

Gluten free staple products remain significantly more expensive and harder to access

In March 2024, the average gluten free loaf of bread cost 68p per 100g, compared to the gluten containing bread which was on average 15p per 100g. This means gluten free bread is 4.5 times more expensive than gluten containing gram for gram.

Further, the average gluten containing loaf decreased in price by 5% over the last year (March 2023 – March 2024), while the average gluten free loaf increased by 0.4%. This means that the gap between gluten free and gluten containing bread is increasing and people on a gluten free diet will face an even greater cost burden for the same products.

¹ 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. Find out more about the Minimum Income Standard here: <https://www.lboro.ac.uk/research/crsp/minimum-income-standard/>

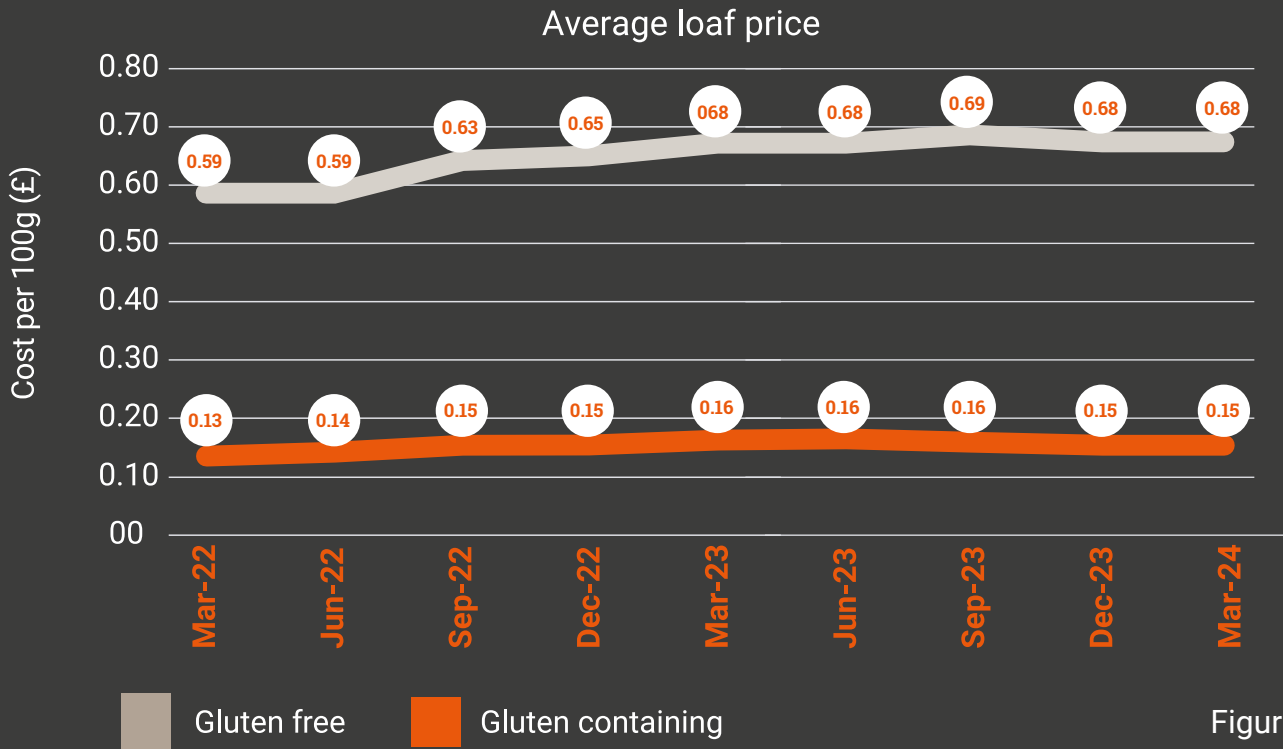


Figure 1

This gap becomes even more apparent when comparing the cheapest loaf across the seven supermarkets. The cheapest gluten free loaf is 35p per 100g compared to just 6p per 100g for the cheapest gluten containing loaf.

The cheapest gluten free loaf is **6.1 times** more expensive in this case

It must also be noted that many supermarkets have a 'cheap' gluten containing loaf that is around 6p per 100g, but this is not the case for the gluten free equivalent, meaning people need to shop around more often for a 'cheap' gluten free loaf.

The gap between gluten free and gluten containing staples has remained over twice the price per 100g on average.



2. The average loaf refers to the average across all loaves of bread for gluten free and gluten containing, whereas the cheapest refers to one loaf for gluten free or gluten containing which is the minimum you can get across all the supermarkets

How many more times expensive for the gluten free equivalent?



Plain Flour:
2.0



Bread Rolls:
3.1



Pasta:
2.0



Crackers:
2.1



Cereals:
2.1

Average:

2.2

A weekly food shop for a gluten free diet VS a gluten containing weekly food shop, by supermarket

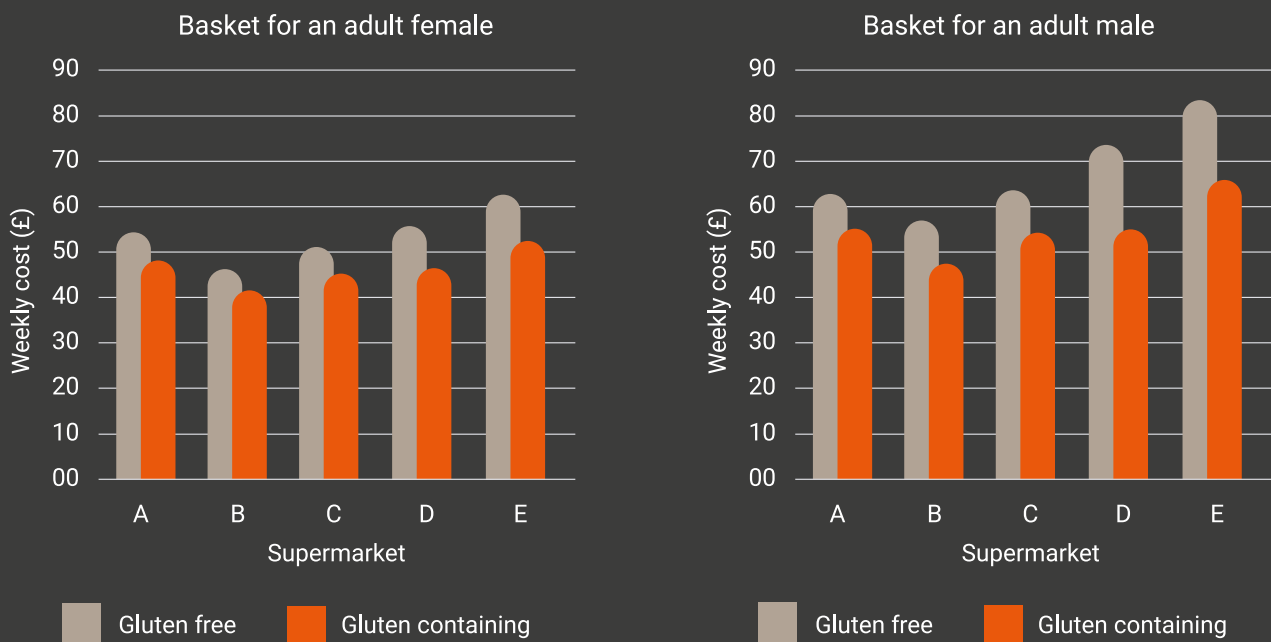


Figure 2



A weekly food shop for a gluten free diet can be as much as 35% more expensive than a standard gluten containing weekly food shop

The worst case scenario amounts to £982.79 more per year for one person. The gap in cost has grown between the average basket suitable for a gluten free diet and the standard gluten containing equivalent. The former is now on average 13% more expensive for the female basket and 22% more expensive for the male basket compared to the gluten containing equivalents. Even though this basket is considered the minimum standard that everyone should be able to afford, the cheapest full shop for a gluten free diet is £46.89 at Supermarket B. Despite this, the households with the lowest 10% of incomes in the UK spend £22.45 per week on grocery food and non-alcoholic drink shopping according to the Government's Family Food Survey (2020)^[6], which is considerably less than the cost of the basket for a gluten free diet or the gluten containing basket.

"Whenever I do a food shop, there is a feeling of anxiety that I would have overspent on what I deem as basics for the week. As an NHS worker with demanding hours, I often need to have some gluten free food available for my short lunch breaks. This necessity can be challenging to fulfil both in terms of accessibility and affordability. Staples like gluten free bread are crucial for quickly assembling a nutritious meal, yet they are often hard to come by at a reasonable price. As a result, I sometimes end up with a less nutritious meal, which is far from ideal given the physical and mental demands of my job."

- Hannah Meakin,
31, Cambridge



COST AND AVAILABILITY SUPERMARKET SURVEY

Shopping online vs in the supermarket – capturing the reality on the ground

Prices from the full weekly food shop analysis including bread and staple substitute products were taken from the online supermarket websites, however there are limitations to this approach. The charity regularly hears from members of the community that the cheapest products are not always available.

Coeliac UK asked the community to complete the cost and availability supermarket survey when they carried out their usual food shop in store or online and to record the amount of gluten free bread loaves, pasta and flour available and what was the cheapest item in stock. Respondents were also asked how they were feeling in relation to cost and availability. The survey ran from 1 June 2023 to 8 September 2023, with over 1,000 shopping trips recorded.

“On every shopping order, there will be items not available or unsuitable substitutions, so I will have to go to multiple shops to ensure that I have what my daughter needs for the week. There’s definitely a lack of choice of substitutions for gluten free foods in general.”

- Hannah English, 34, Mum of Harper aged 5, Ipswich



“As a gastroenterology dietitian, I have seen firsthand how the rising cost of gluten free foods profoundly impacts patients with coeliac disease. The findings from the Coeliac UK report highlight a critical concern: many patients struggle to afford the only effective treatment for their condition—a strict gluten free diet. This financial burden not only adds stress but also risks inadequate nutritional intake and poor health outcomes, especially during the current cost of living crisis. Ensuring affordable access to gluten free foods is essential for the well-being of the coeliac community.”

- Nick Trott RD, Gastroenterology Dietitian, Royal Hallamshire Hospital & The University Of Sheffield

THE FINDINGS

Cost

The cheapest gluten free bread available in store at the time of the shopping trip varied from an average 44p per 100g to 76p per 100g per supermarket chain. In the worst cases, you would have to pay up to £1.33 per 100g for the cheapest available loaf. That is a staggering 22 times more expensive than the cheapest gluten containing loaf at 6p per 100g. The cheapest gluten free loaf sold in store is not always available on the day of shopping and higher cost loaves may be the only option. Further, the average cost of the cheapest gluten free loaf available was dependent on the size of the store. For larger stores³, like hypermarkets, the cheapest loaf was 42p per 100g on average. Whereas the cost at a convenience store, was 64% more expensive on average (69p per 100g). Figure 3 shows the average cost per 100 grams of the cheapest loaf of gluten free bread, broken down by supermarket type.

**Worst case scenario:
the cheapest available
gluten free loaf was
22 times more expensive
gram for gram, than the
cheapest available
gluten containing loaf**



Prices of gluten free bread are considerably higher at the smaller stores. It is more likely that convenience and budget stores are found in rural communities and deprived areas, so this disproportionately impacts poor socioeconomic cohorts, the elderly, and physically disabled^[7].

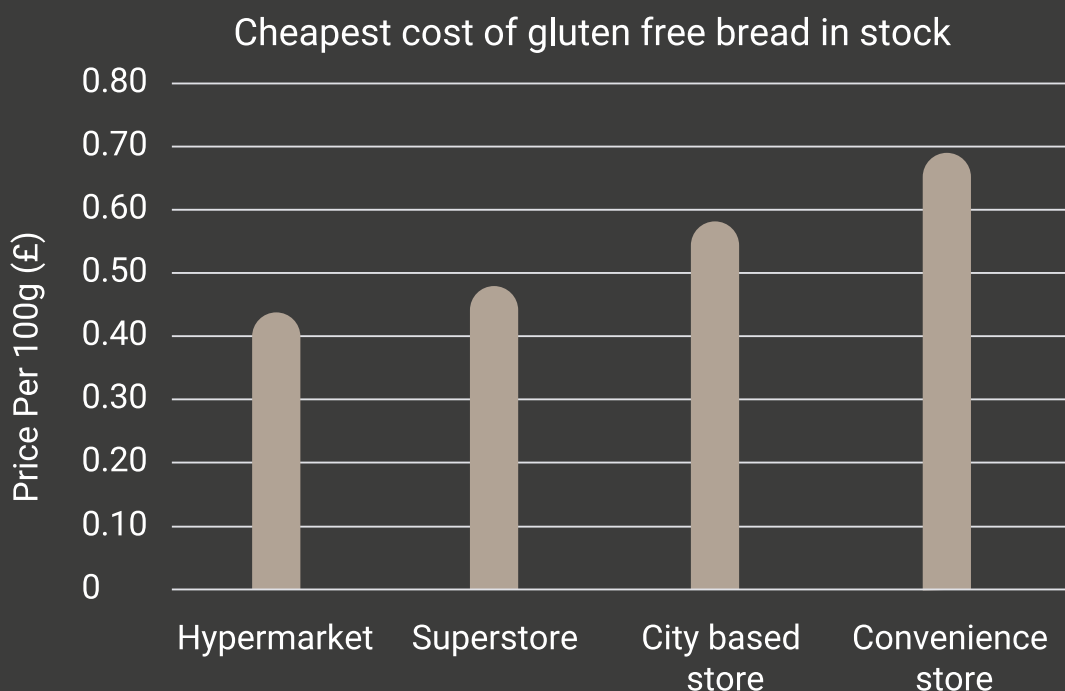


Figure 3

³ Hypermarket refers to stores which sell full range including clothes, homeware and electricals, as well as food. Superstore refers to stores which sell large range of groceries and small range of non-food goods.

The price of the cheapest gluten free pasta available at each supermarket ranged from 15p to £1.33 per 100g. However, the 15p per 100g pasta was only consistently available for most shopping trips at one supermarket chain. For the cheapest gluten free flour available, on more than half of shopping trips, it costed at the most 20p per 100g. For one supermarket chain, the cost was 11p per 100g for the majority of shopping trips. However, in the worst case, you could be paying as much as 80p per 100g for the cheapest gluten free flour.

Availability

Overall, a gluten free loaf of bread was available most of the time in hypermarkets, superstores, city based stores and convenience stores (95-100% of the time in stock). Gluten free pasta was found to be almost always available in larger stores (99-100% of the time). For city based and convenience stores, you could find gluten free pasta in 9 out of 10 stores. For hypermarket, superstore, convenience and city based stores, gluten free flour was available between 60-89% of the time. City based stores only had stock of gluten free flour just over half of the time.

This however was not the case if consumers shopped in a budget store. 35% of survey respondents shopped at budget supermarkets, yet they reported no availability of gluten free bread. Gluten free pasta was only available 10% of the time (1 in 10 shopping trips). Gluten free flour was not available for any of the shopping trips to budget supermarkets.

When shopping online, 1 out of 3 orders for gluten free bread loaves were out of stock and 1 out of 4 orders for gluten free flour were out of stock. Where substitutes were allowed or provided, in 1 in 3 cases they were not suitable for a gluten free diet.



Survey respondents reported no gluten free bread available at the budget supermarkets

Gluten free bread loaves were out of stock for 1 out of 3 online orders



The full food shop

In addition to staple gluten free products, further research was carried out to assess how much a full weekly food shop would cost in store rather than online and whether there were any issues with out of stock products. Volunteers from across the UK gathered to help collect prices for a weekly food shop suitable for a gluten free diet and prices for an equivalent gluten containing diet.



0%

of supermarkets had full availability

Out of the 15 supermarkets visited, no supermarket had availability of every item included in a weekly food shop for a gluten free diet

20%

OUT OF STOCK

On average **20% of products** requiring a substitute for a gluten free diet in a weekly shop were out of stock or not available in store. This increased to **72% for budget supermarkets**

Availability of products suitable for a gluten free diet was an issue at every store. Out of the 15 supermarkets visited, no supermarket had availability of all the items required in a weekly food shop. As a result, it was impossible to do a weekly food shop suitable for a gluten free diet at any supermarket visited by the volunteers.

Further, the price difference between the weekly food shop for gluten free and gluten containing was higher in store compared to the online prices. Once the basket was adjusted for out of stock issues, it was found that the full food shop for a gluten free diet for a female was on average 25% more than the gluten containing equivalent while the online difference was found to be 13%. The male shopping basket had the same price differential for online and in store.



“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.”

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

Attitudes to shopping for a gluten free diet

The charity's cost and availability supermarket survey also asked people with coeliac disease how they felt about shopping for a gluten free diet and how cost and availability of gluten free food in supermarkets and online impacted them.

87% of respondents had problems with overall availability of gluten free food and 86% were unable to fulfil all their gluten free needs at one supermarket

72% said shopping for gluten free foods adversely affects their quality of life and 77% struggled to afford gluten free products

4% 4 in every 100 people were actively eating gluten out of cost concerns and nearly a third were opting to eat products with may contain statements for cereals containing gluten for the same reason



GLUTEN FREE FOOD ON PRESCRIPTION - A LIFELINE FOR THOSE DIAGNOSED WITH COELIAC DISEASE

Certain gluten free staple substitutes have been made available on the NHS for decades, in recognition of the twin barriers of increased cost and limited availability of gluten free products. However, in recent years many ICBs have opted to cut back on this much needed support with gluten free prescriptions in England reducing by 70% since 2016.

While those living in Wales, Scotland and Northern Ireland can still access gluten free staple products on prescription, in England it has become a postcode lottery. As of June 2024, roughly 50% people in England live in an area that prescribes gluten free compared to 80% less a decade ago*. This has left far too many people cut adrift from this support at the very time they need it most.

Untreated coeliac disease is bad news for the NHS that has to pick up the tab for treating resultant health complications and devastating for the individuals impacted. It is critical that policy makers recognise the need for change.



“Being able to receive gluten free bread on prescription is a game changer. I can now spend more money on food for my children, as well as enjoy a more varied and balanced diet which is now strictly gluten free. It’s a relief no longer having to endure gut issues and it’s a weight off my shoulders having this support with food bills. The prescriptions have been a fantastic safety net and a way of sticking to a gluten free diet – I couldn’t imagine living without this lifeline. It’s been so important to me, and I’d never want to see anyone else needing to make the difficult decisions I had to make.”

- Andrew Bloodworth, 42, Stamford

*Data based on Coeliac UK analysis of NHS England gluten free prescribing policies and expenditure (2016-2023)

WHY IS GLUTEN FREE MORE EXPENSIVE?

There are several factors that may influence the price of gluten free food products and Coeliac UK continues to invite those industry partners who have yet to engage with the charity to join with us to tackle this issue. Factors that may influence the price of gluten free food 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.

For an insight into what goes into manufacturing gluten free staples products, the charity spoke to gluten free manufacturer, Warburtons.

“The key to making good quality gluten free bread starts with sourcing the best gluten free ingredients. With gluten free baking specifically, we are looking to mimic the functional aspects of wheat – which is difficult – hence the reason there are so many different ingredients in gluten free items. Alongside this we must ensure all ingredients are gluten free through a rigorous due diligence process.”

Chris Hook, Free From Director, Warburtons



TAKING THE CAMPAIGN FORWARD

A lot has happened since the launch of our previous report in March 2023 yet in some respects little has changed for those facing the challenge of managing a medically prescribed gluten free diet. The cheapest gluten free loaf remains more than six times as expensive as gluten containing equivalents, gram for gram and the weekly food shop for a gluten free diet is as much as 35% more expensive. As this report clearly shows, gluten free staple substitutes are more expensive, harder to access and not reliably available for those who need them most.

Coeliac disease is not a lifestyle choice; it cannot be right that so many are being priced out from the products that keep them well.

OUR MESSAGE TO THE UK GOVERNMENT

That is why for the next part of our campaign we are calling on the UK Government to:

- Work with Coeliac UK and healthcare experts to develop and share best practice models for protecting access to gluten free prescriptions for those who need it
- Meet with patient representatives to understand their concerns and learn about the patient experience
- Review the decision making processes from ICBs who have removed provision since 2022, monitoring its impact and report back to the Minister
- Publish updated guidance for ICBs that:
 - Re-iterates the critical role of the gluten free diet and the importance of staple gluten free substitute products in treating the condition.
 - Highlights the ICB's legal duties under the National Health Service Act 2006 to reduce Inequalities and meaningfully engage patients in decision making.
 - Notes the findings of the 2018 review of gluten free prescriptions and the vital importance of maintaining access to gluten free bread and flour for the those who need it
 - Emphasises the importance of ensuring access to annual review for patients with coeliac disease.



“After two decades in this field, I am concerned as to why the treatment for this life-long, prevalent autoimmune condition cannot be funded like the essential therapy for any other disabling disease. Governments, commissioners and those who apportion funding need to realise, that for patients with coeliac disease, a strict gluten free diet is not a “lifestyle choice”. It is the medicine that keeps them well and avoids serious complications. It is complex, socially divisive and very, very expensive.”

- Dr Ieuan Davies, Consultant Paediatric Gastroenterologist, Department of Child Health, Morriston Hospital, Swansea

OUR MESSAGE TO THE FOOD INDUSTRY

Policy intervention is urgently needed to support those in need, but for a long-term, sustainable solution, industry action is also essential. We welcome the commitment shown by industry partners such as the Gluten Free Industry Association (GFIA) to tackle this challenge. We look forward to working with them to further support the coeliac community and encourage others to engage with the charity to address the concerns raised in this report.

Much more needs to be done and we are working with the food industry to develop new initiatives to ensure access to more affordable and accessible gluten free staple substitute products.

We urge retailers to:

- Meet with Coeliac UK to understand the challenges facing the coeliac community and address existing barriers of cost, access and availability.
- Commit to developing retail offers that ensure a range of staple gluten free substitutes products are available on the shelf and online at affordable prices across stores, particularly for those who need it most.

The challenge set out in this report is imposing yet it is one that can and must be overcome. The reality for too many people across the UK with coeliac disease is that the food that keeps them well is too expensive and hard to access. The solution requires action from both Government and industry and we hope that the stark realities laid out in this report, coupled with the welcome support from stakeholders, can prove a catalyst for meaningful change for the coeliac community across the UK.

We would like to thank all those who have supported our campaign to date and encourage those inspired by this report to join us in helping to improve the lives of those with coeliac disease. In so doing, we can prevent this cost of living crisis becoming a health crisis.



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

2024 UPDATE

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 2022 and March 2024.



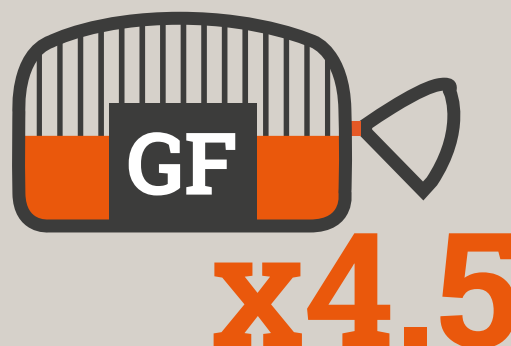
The cheapest gluten free loaf of bread is **6.1 times more expensive** than the cheapest gluten containing loaf gram for gram



On average, between December 2022 and March 2024, gluten free bread has **increased by almost 7p per 100g** while the gluten containing equivalent has **increased by less than a penny per 100g**

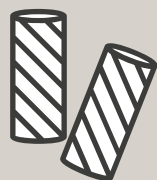


A full weekly food shop for a gluten free diet can be as much as **35% more expensive** than a standard gluten containing weekly food shop



A gluten free loaf of bread is on average **4.5 times more expensive** than a standard gluten containing loaf gram for gram

How much more expensive for the gluten free equivalent on average?



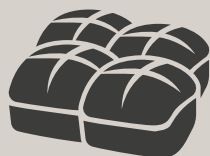
Pasta:

2.0



Plain Flour:

2.0



Bread Rolls:

3.1



Crackers:

1.7



Cereals:

2.1

A Coeliac UK survey of over 1,000 respondents found that people with coeliac disease were opting to risk consuming gluten for cost reasons. This is particularly concerning as such individuals are potentially jeopardising their health as a result.

4%

4 in every 100 people were actively eating gluten out of cost concerns and nearly a third were opting to eat products with may contain statements for cereals containing gluten, for the same reason

77%

Almost 8 in 10 of respondents reported struggling to afford gluten free products



The survey also highlighted the additional barriers of access and availability.

87%

Nearly 9 in 10 respondents described problems with overall availability of products

86%

Nearly 9 in 10 of respondents were unable to fulfil all their needs at one shop

72%

7 in 10 people said shopping gluten free 'adversely affects their quality of life'



OUT OF STOCK

1 in 3 cases

When shopping online, for 1 out of 3 orders, gluten free bread loaves were out of stock. Where substitutes were allowed or provided, in 1 in 3 cases they were not suitable for a gluten free diet

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 2022-March 2024 and staple substitutes collected every six months and last updated in March 2024. 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 every 6 months and last updated in March 2024.

GET INVOLVED

At Coeliac UK we are only as strong as those we represent. So, we are 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 to policy makers and sharing our posts on social media.

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. You can also call our free Helpline on 0333 332 2033 for advice and support from our friendly team.



Acknowledgments:

Hannah English, Andrew Bloodworth, Hannah Meakin, Dr Sophie Velleman, Nick Trott RD, Dr Ieuan Davies, Dr Gerry Robins, Abigail Davies, Mike Wilcock, Jacqui Smith, Fedelmia Regan, Ian and Janet Severn, Fiona Gibbon, Brian Pike, Susan Baines, Janice Sadler, Christine Parkin, Julie McLaren, Margaret Hollow, Jenny and Ian Newsome, Zoe Thomas, Jane Mitton, Peter Canell, David Lissaman, Kate Powell

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www.coeliac.org.uk



Registered office Coeliac UK,
Artisan, Hillbottom Road,
High Wycombe,
Buckinghamshire,
HP12 4HJ
Bucks HP11 2QW.



Helpline: 0333 332 2033



generalenquiries@coeliac.org.uk



www.coeliac.org.uk



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