

SAFE — SAFE FOOD ADVOCACY EUROPE
Food4Inclusion (ESF+ EaSI-funded project)

School Meals in SAFE Member Countries

Survey Analysis — Statistical Overview of Member Responses

Prepared by the Czech Consumer Association ahead of the online mutual-learning presentation on catering (meals) in schools, as part of the Food4Inclusion project. This document summarises the questionnaire sent to SAFE members between 7 and 20 July 2026 and is intended for distribution to project partners in advance of the presentation.

July 2026

Executive Summary

- 14 completed responses were received from 10 countries (a 15th file received was the blank master questionnaire and is excluded from the analysis — see Methodology).
- 11 of 14 respondents (79%) report that their country has national standards for school meals; where standards exist, most are described as mandatory (8 of 12, 57%).
- The central finding concerns implementation, not rules: only 3 of 14 (21%) say everyday school practice fully matches the official rules; 9 of 14 (64%) say it matches only partially. No respondent said practice does not reflect the rules at all.
- No single nutrition-related problem dominates — high sugar consumption, ultra-processed foods, low fruit/vegetable intake and budget constraints are each cited by 3 of 14 organisations.
- NGOs are seen mainly as educators (11 of 14) and policy contributors (8 of 14), almost never as monitors of compliance (1 of 14); several respondents actively call for a stronger consumer-association role in oversight.
- Engagement is high: 10 of 14 organisations volunteered for an active role in the online event (presenting, sharing a practice example, or joining the discussion); only one organisation declined.

Methodology and Respondents

A questionnaire on catering (meals) in schools was circulated to SAFE members between 7 and 20 July 2026, on a voluntary basis, in preparation for an online mutual-learning presentation on school-meal practices, with a case study on the Czech Republic. Fifteen files were submitted. One of these was the unfilled master questionnaire template (no organisation, country or answers entered) and has been excluded; the analysis below is therefore based on 14 completed responses from 10 countries.

Because the sample is small, voluntary and self-selected, it should be read as an illustrative snapshot of the views of engaged SAFE members rather than as a statistically representative picture of school catering across all SAFE member countries. Italy (4 organisations) and Spain (2 organisations) are represented more than once, while the remaining 8 countries each contributed a single response; this shapes the frequency counts throughout the report.

Respondents (14 organisations, 10 countries)

Organisation	Country
Association of Consumer Organizations in Slovakia (A3S)	Slovakia
Centre for Education and Informing Consumers	Croatia
EMOTIFOOD	Italy
Heroes of Responsible Dining Foundation	Hungary
Huerteco	Spain
Consumers United / Consumatorii Uniți	Romania
ADOC APS	Italy
The Vegetarian Society of Denmark	Denmark
SONVE	Italy
Union of Working Consumers of Greece (EEKE)	Greece
Confederación ConsumES	Spain
Cerden	Belgium
University of Rzeszów – Department of Dietetics	Poland
U.Di.Con. APS – Unione per la Difesa dei Consumatori	Italy

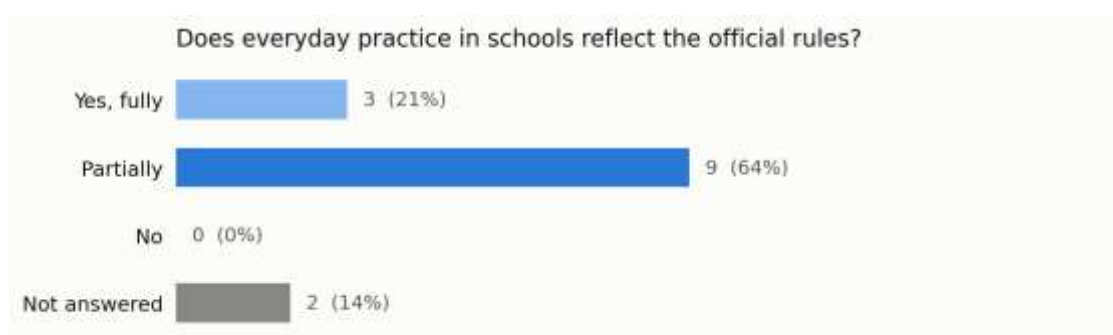
A. System and Regulation



Most respondents (11 of 14, 79%) report that their country has national standards for school meals or nutrition; two say no — Denmark, where school-meal trials are underway but not yet backed by binding national rules, and Belgium, where school catering is a regional ("Community") competence with no single federal standard. One respondent (Slovakia) left this and all other closed-ended questions unanswered.

Where standards exist, most respondents describe them as mandatory (8 of 12 answers, 57%); three describe a mixed regime (ADOC and SONVE in Italy, and Belgium's regional model), and one (U.Di.Con., Italy) describes national guidance as voluntary, implemented mainly through regional rules and local menu approval. A monitoring or enforcement mechanism is reported by 10 of 14 respondents; one is unsure and one reports only partial oversight.

B. Practice vs. Regulation — the Key Dimension

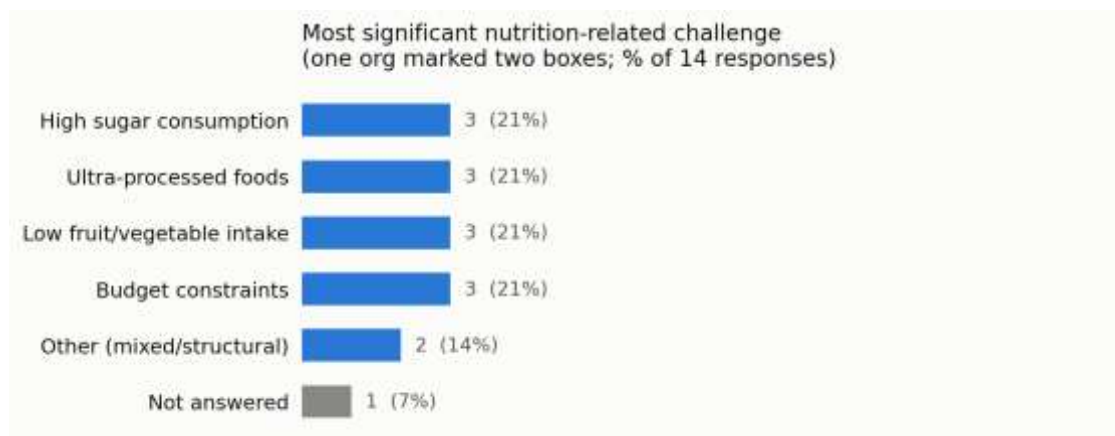


This is the survey's central finding, and the dimension the project specifically asked members to assess. Even where rules exist, only 3 of 14 respondents (21%) say everyday school practice fully matches them; 9 of 14 (64%) say it matches only partially, and none report an outright mismatch (2 left the question unanswered). In short: among these respondents, the gap SAFE members report is mainly about implementation, not about an absence of rules.

The free-text answers on implementation challenges converge on a consistent, recurring set of practical constraints, cited across otherwise very different national systems:

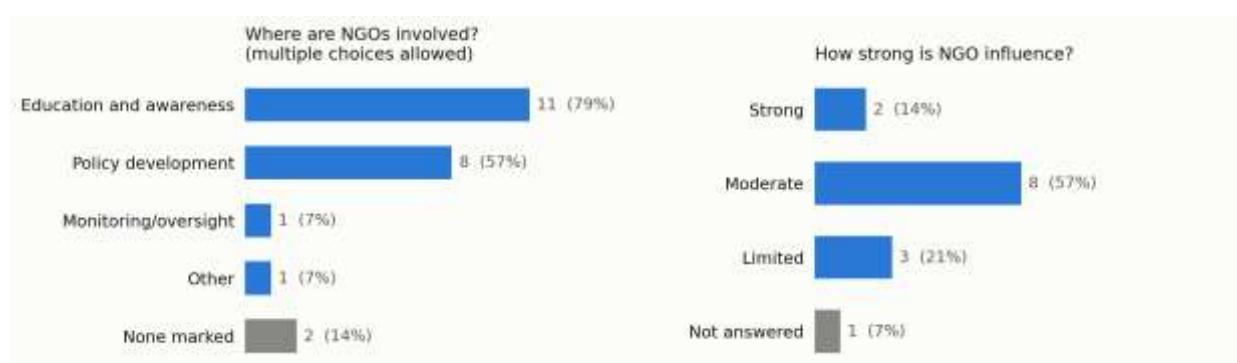
- Tight per-meal budgets — e.g. Romania (~€3.5/student incl. VAT), Hungary, Poland.
- Shortage of qualified kitchen staff and dietetic expertise — Poland, Hungary, Spain (ConsumES).
- Schools lacking a kitchen or dining hall, defaulting to cold, packaged food — Croatia, Romania.
- Inconsistent enforcement across municipalities or regions — Italy (ADOC, U.Di.Con.), Belgium.
- Low child acceptance of healthier menus, which pushes schools back toward familiar processed options — Poland, Hungary, EMOTIFOOD (Italy).

C. Nutrition-Related Challenges



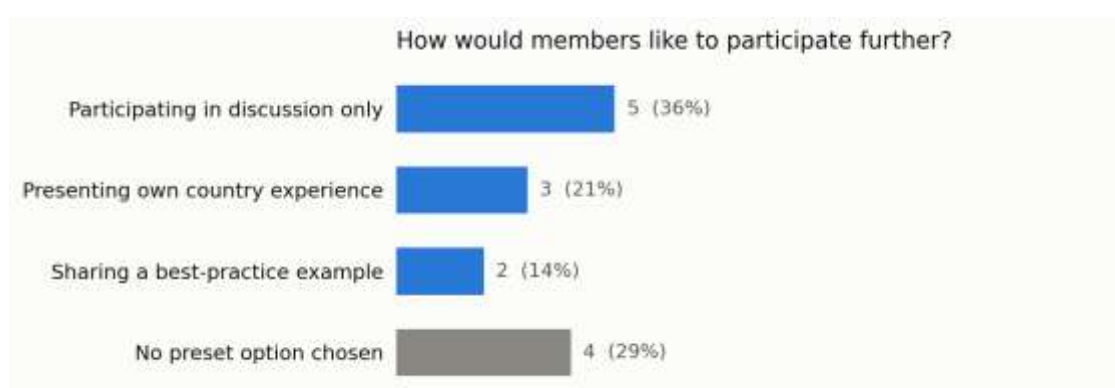
No single issue dominates: high sugar consumption, ultra-processed foods, low fruit/vegetable intake and budget constraints are each flagged by 3 of the 14 organisations as the most significant challenge in their country, with 2 further respondents citing a combination of factors as "other" (one org marked two boxes on what was meant to be a single-choice question — see Limitations). This even split suggests that a Czech case-study presentation on regulation should speak to several of these levers rather than assume one dominant national problem.

D. Role of NGOs



NGOs are seen overwhelmingly as educators — 11 of 14 respondents place them in "education and awareness" — and, to a lesser extent, as contributors to policy development (8 of 14). Very few report an NGO role in monitoring or oversight (1 of 14). Several respondents note this as a gap rather than a given: Spain's ConsumES, for example, explicitly states that consumer associations have no formal role in monitoring compliance under its new decree and are actively requesting one. Reported influence clusters around "moderate" (8 of 14), with fewer respondents calling it "strong" (2) or "limited" (3).

E. Motivation to Participate Further



Engagement with the project is strong: 10 of the 14 organisations opted into an active role in the online presentation — presenting their own country's experience (3: Croatia, Huerteco/Spain, Poland), sharing a best-practice example (2: Greece, ConsumES/Spain), or joining the discussion (5). Only one organisation (Cerden, Belgium) explicitly declined; the remainder gave a free-text comment rather than selecting a preset option. This gives the discussion section (Part 3 of the presentation) a ready pool of countries willing to speak, if the agenda allows.

F. What Members Find Most Frustrating (Open Question)

This closing, optional question was free text rather than multiple choice; the answers cluster around five recurring themes:

- **Ambition vs. resources:** a gap between new or ambitious regulation and the real financial, human and inspection resources to implement it without shifting costs onto families (ConsumES and Huerteco, Spain; Cerden, Belgium).
- **Infrastructure:** schools without a kitchen or dining hall are forced into cold, packaged meals regardless of what the rules say (Croatia; Consumers United, Romania).
- **Non-binding rules:** some countries rely on a voluntary quality codex rather than mandatory standards (Vegetarian Society of Denmark).
- **The food environment outside school:** sugary drinks, processed snacks, packed lunches from home and media influence undercut school-based efforts (A3S, Slovakia; EEKE, Greece).
- **Local inequality:** outcomes depend heavily on the budget and priorities of the individual school or municipality (U.Di.Con., Italy; Croatia).

Limitations and Data Notes

In the interest of transparency for partners who will use this analysis, the following data-quality points are worth keeping in mind:

- **Sample size and representativeness:** 14 completed responses from 10 countries is a small, voluntary, self-selected sample. It is best read as a set of illustrative signals from engaged SAFE members, not a statistically representative survey of school catering across Europe.
- **Uneven country coverage:** Italy contributed 4 responses and Spain 2; the other 8 countries contributed 1 each. Percentages in this report are of the 14 organisational responses, not of 14 countries.
- **Incomplete response:** Slovakia (A3S) left every closed-ended question blank and answered only the two open-text questions; it is excluded from all percentage calculations on closed questions but included in the open-question synthesis.
- **One file excluded:** of the 15 files originally supplied, one was the blank master questionnaire template with no answers and was not counted as a response.
- **Double-marked answer:** SONVE (Italy) selected two options on a nutrition-challenge question intended as single-choice; both are counted in Section C.
- **Inferred answer:** Consumers United (Romania) did not tick a box on the monitoring question but described active audits by named authorities in its comment; this has been coded as "Yes" on that basis.
- **Non-standard "No":** Belgium (Cerden) answered "No" to the national-standards question because catering is organised at regional (Community) level, yet still described a regional model in the follow-up question — a reminder that a binary yes/no does not map cleanly onto federalised systems.

Appendix — Full Response Table

"Yes*" for Poland: the closed answer is "Yes", but the accompanying comment notes that quality depends heavily on the individual school, municipality and catering model. n.a. = not applicable or not answered.

Organisation	Country	Standards exist?	Practice reflects rules?	Top nutrition issue	Most frustrating issue (short)
A3S	Slovakia	n.a.	n.a.	n.a.	Media influence pushes fast food/energy drinks despite school efforts
Centre for Education & Informing Consumers	Croatia	Yes	Yes	Other (kitchen infrastructure gap)	"Geographical lottery" of food quality via the bakery-product loophole
EMOTIFOOD	Italy	Yes	Partially	Ultra-processed foods	Gap between recommendations and children's real eating behaviour
Heroes of Responsible Dining Fdn.	Hungary	Yes	Partially	Budget constraints	Sustainability not systematically integrated into procurement
Huerteco	Spain	Yes	Partially	High sugar consumption	Hard to serve food grown at the school itself
Consumers United	Romania	Yes	Partially	Budget constraints	Cold sandwich box instead of a hot cooked meal
ADOC APS	Italy	Yes	Partially	Low fruit/vegetable intake	(no answer)
Vegetarian Society of Denmark	Denmark	No	n.a.	Low fruit/vegetable intake	Guidelines are voluntary, not mandatory
SONVE	Italy	Yes	Partially	High sugar + low fruit/veg (both marked)	Too much sugar, too much animal protein
Union of Working Consumers (EEKE)	Greece	Yes	Partially	High sugar consumption	Students consume processed foods, juices, energy drinks
Confederación ConsumES	Spain	Yes	Partially	Other (ultra-processed + budget)	Gap between new regulation's ambition and real resources
Cerden	Belgium	No (regional competence)	Partially	Ultra-processed foods	Ambition vs. tight budgets/outourcing, esp. for vulnerable pupils
Univ. of Rzeszów – Dietetics	Poland	Yes	Yes*	Budget constraints	Low child acceptance of healthier meals pressures schools/parents
U.Di.Con. APS	Italy	Yes	Yes	Ultra-processed foods	(no answer)