

# Free from & plant based



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 With plant-based foods having seen a downturn in recent years, as consumers reassess both their spending priorities and their health, it has given the category an opportunity for a reset along more natural lines. Both this and the free-from category are discovering the benefit of innovating in a way that mirrors traditional consumption cues, with flavour and convenience to the fore.

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## Analysis

# Retrench, reassess, reactivate

A challenged plant-based category is exploring more natural routes, while free-from suppliers are expanding their repertoires



➔ Naturalness, versatility and convenience are the three key trends colouring the plant-based and free-from markets in recent times.

While sales of plant-based foods have suffered due to the economic woes faced by consumers in the past two years, their ingredients and provenance have also come under heightened shopper scrutiny, necessitating some to reformulate or justify their clean-label credentials. As a result, more traditional plant-based ingredients such as tofu or tempeh have flourished, but still suffer from a lack of education among consumers as to how best to use them.

Meanwhile, as free-from products dust off their previous image of 'beige' and 'tasteless', their recent forays into more interesting, world-influenced flavours and formats are beginning to

excite more broad-based interest and innovation, with an ambition by some suppliers to inject the category with colour, life and a certain sense of joyful irreverence. In short, there is plenty of activity in both categories. So how are they faring?

The tofu market has grown by approximately £20m in retail sales value over the last three years<sup>1</sup>, outperforming the UK meat-free sector across both value and volume

**“We’re seeing clear signs of stabilisation across the plant-based category, with growth in more authentic, natural-led segments”**

(kg) during that period<sup>2</sup>, says Lucy Grogut, marketing director at Cauldron Foods. This, she says, signals positive momentum within the wider plant-based category, with a key driver of the growth being penetration gains, as the category attracted an additional 0.4m buyers in the last 52 weeks<sup>3</sup>. “This shows that growth is also coming from more consumers entering the category, over existing shoppers buying more,” she suggests.

According to The Tofoo Co’s co-founder and CEO David Knibbs, the past year has been one of recalibration rather than decline. “While the broader plant-based category has faced well-documented challenges, particularly around concerns over ultra-processed foods (UPFs), tofu has remained a standout performer,” he says. “Its

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natural credentials, health benefits and versatility continue to resonate strongly with consumers. As a result, tofu's share of the chilled meat-free category has reached a record 21.8%<sup>4</sup>, with the combined tofu and tempeh segment now worth over £65m, growing +13.2% year-on-year<sup>5</sup>.

"We're now seeing clear signs of stabilisation across the category, with growth in more authentic, natural-led segments," he adds. "Consumers are becoming more discerning, but this shift is ultimately positive, rewarding products that deliver on taste, quality and transparency, and signalling a more mature and resilient market going forwards."

With the steepest drop happening between 2023 and 2024, the UK plant-based meat category has faced an ongoing downward trend, reveals Elaine Moffatt, regional sales manager UK & Ireland retail at Beyond Meat. "However, early signs of recovery emerged in Q2 2025, led by a stabilisation in the chilled segment," she notes. "Chilled plant-based meat has been flat, at +0.7% versus last year<sup>6</sup>. In contrast, the frozen segment remains under significant pressure, declining by -7.1% versus last year<sup>7</sup>."

The chilled meat-free category has continued to decline over the past year (-1.4% in value and -2.5% in volume<sup>8</sup>), with an even steeper drop in the last 12 weeks<sup>9</sup>, indicating that the category is still adjusting after several years of volatility, counters Jason Fordham, customer insights director at The Compleat Food Group. "Despite this, certain parts of the market show clear signs of resilience and even strong recovery," he says. "Of all the protein bases within plant-based alternatives, tofu and tempeh are seeing the strongest growth, with tofu +8.3%<sup>10</sup> and tempeh up an impressive +26.7% in value<sup>11</sup>."

"Nearly half of shoppers still intend to increase their plant-based consumption or reduce meat<sup>12</sup>, which tells us the long-term opportunity remains significant," he adds. "The task is ensuring the category becomes simpler, tastier and easier to shop."

Overall, the free-from category continued to grow over the last 12 months, with a wide range of consumers needing to – or indeed choosing to – purchase free-from products, says Chris Hook, director of Warburtons Gluten Free. While sales of



free-from bread products remained flat against last year, sandwich alternatives such as pittas, proved most popular, up +11% in the last year alone<sup>13</sup>, he says.

Gluten-free flour in the free-from aisle has seen solid growth, with sales up 5.5% in volume over the latest 26 weeks<sup>14</sup>, indicating an increased interest in at-home cooking, says Clare Marriage, founder of Doves Farm Foods. "To meet this demand, Freee relaunched its baking mixes range at the end of 2025, including a new bag-in-box format with a vibrant, refreshed design to improve shelf stand-out and visibility," she says. "The refresh

**“Growth in the gluten-free bakery sector is increasingly being driven by products that feel closer to mainstream bakery”**

also included new products such as a gluten-free Yorkshire Pudding mix, Crumble Mix and, a category-first gluten-free Dumpling Mix.”

While the gluten-free bakery sector has continued to grow, it's becoming more polarised, says Matthew Cain, marketing director at Juvela, owner of the OAF brand. "Growth is increasingly being driven by products that feel closer to mainstream bakery, while more traditional functional offerings are starting to fall behind," he maintains. "For a long time, gluten-free bread has been accepted as a compromise, but that's changing. Shoppers now expect it to deliver on taste and texture in the same way as standard bakery, particularly in everyday staples."

Across several of the free-from sectors in which it works, Nairn's Oatcakes has seen value and volume growth, confirming good underlying demand, says marketing director Kevin

# How free-from is engaging shoppers

In the free-from bakery sector, there is now more of a tendency to echo popular products in the mainstream market, as Juvela's Cain explains. "Growth in free-from is coming from improving the products people buy every day, not niche innovation," he says. "In gluten-free bakery, that means better loaves, rolls and everyday formats. That's where most of the volume sits, and where the biggest gap versus standard bakery still exists.

"At the same time, there is growing demand for more engaging products and formats," he

adds. "Flavour and format innovation – whether that's indulgent inclusions, bolder combinations, or more relevant formats – is helping to bring more interest into the category. The opportunity is not one or the other, but both: better basics and more engaging products.

"Not all consumers are looking for fully 14-allergen-free solutions. Many simply want great-tasting gluten-free products, which creates more flexibility to innovate on flavour and overall quality."

At Warburtons, Hook says: "Ultimately, consumers are always looking for ways to make mealtimes more

exciting, and those following a gluten-free diet are looking for the same things that those who aren't – great quality products that are available and affordable, just without the gluten. In bakery products, new flatbreads or pittas are particularly popular as they are versatile, making a great lunchtime butty or partner to a meal."

Meanwhile, at Nairn's, Butterworth describes the free-from category as "highly competitive" but says the company continues to see success in the areas in which it plays. He points to the continued growth of snacking and

snacking occasions, noting that these are important to category growth. In this area, Nairn's has successfully established its Mini Cheese Bakes, which Butterworth says are now established on the fixture, and the company has extended this into sweet mini-bake alternatives this year.

"Our Mini Cheese Bakes format continues to drive strong value and volume growth – and this performance has given us confidence to further invest in NPD in this area," he explains. "All of our range are in portion bags for on-the-go convenience."

Butterworth. He reports that, in the latest 12 weeks, free-from biscuits grew by +6% in value<sup>15</sup>, with units up +2% year-on-year, while free-from breakfast cereal saw value rise by +4% YoY and units up +3%<sup>16</sup>. However, the strongest performance was in free-from savoury snacks (+12% YoY in value and +7% YoY in units)<sup>17</sup>. "Demand continues to be driven by those who have allergens (diagnosed or self-diagnosed) and 'lifestylers'," he says.

## Health, protein, clean label

"Health and protein continue to be two of the strongest motivators for consumers entering or returning to plant-based, and this shift is reflected in the performance of cleaner-label products," says The Compleat Food Group's Fordham. "But at the same time, research indicates that a sizeable proportion of consumers are not driven by health at all and are instead simply looking for improved flavour. This

duality means that brands must deliver on natural ingredient cues without compromising on taste.

"Overall, we see formulations moving steadily towards fewer ingredients, more recognisable plant components and continued investment in taste and texture," he notes. "Cleaner labels are becoming more important, but consumers will only remain loyal when the products taste exceptional."

Health is a key focus area with the continued trend for high protein content, along with the newly emerging focus on the importance of fibre, says Beyond Meat's Moffatt. "This opens a major opportunity to drive new interest in the plant-based meat category as an area that can deliver against both credentials, while often delivering lower saturated fat compared to its animal-based counterparts," she notes.

While Juvela's Cain agrees that health & nutrition are driving change, he says the conversation is shifting. "There's

growing pushback against over-complicated, over-processed products, and a move towards simpler, more recognisable ingredients," he notes. "In gluten-free that translates into less focus on claims and more focus on how the product actually performs. Taste and simplicity are becoming just as important as functionality."

"We're seeing a clear shift towards simpler, more recognisable ingredients and away from highly processed formulations, agrees The Tofoo Co's Knibbs. "Consumers are scrutinising labels more closely than ever, with growing focus on cleaner ingredient lists, protein content, gut health and overall nutritional value. In response, many brands are reformulating to meet these evolving expectations. But as scrutiny increases, so does scepticism and that's driving a renewed preference for natural, minimally processed foods."

Health and wellbeing, functional

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foods, nutritionally rich and a shift to more natural offerings are the bigger trends that will continue to shape the free-from category, according to Nairn's Butterworth. "GLP-1 remains in its infancy but certainly has the potential, if it gets scale, to change consumer behaviour," he says. "It's important for brands to increase brand and product awareness, becoming more salient and relevant not just with a core free-from audience but with the broader 'lifestyler' consumer."

While taste and texture have always been important for snacking products, consumers are much more aware of what goes into their food – whether that be a move away from UPF or a more informed understanding of ingredients on the back of the pack, adds Butterworth. "At Nairn's we are well placed as we have always focused on cleaner and more natural ingredients."

With an increasing awareness around allergies in many settings these days, from schools, to workplaces, places of sport and in the hospitality sector, Freee has continue to develop its on-the-go range as a result, says Dove Farm Foods' Marriage. The company introduced a new Freee Kids Oaty Bar range late last year, made without any of the top 14 allergens, so suitable for lunchboxes in allergen-sensitive settings, she says. Meanwhile, its gluten- dairy and nut-free Oat Bars are up 26.5% in volume last year<sup>18</sup>, with new distribution coming in Tesco and Morrisons this spring.

### Other plant-based drivers

Much of the renewed interest in plant-based is being driven by a dual dynamic: strong growth in core ingredients alongside demand-driven innovation in finished products, says Cauldron Foods' Grogut "On the ingredients side, tofu is seeing increased traction as shoppers look for versatile, protein-rich options that tap into scratch cooking trends and the broader shift towards consumers wanting flexibility, value and unbeatable flavour," she notes. And she points to the pace of innovation within tofu, with many new products being launched in recent years, demonstrating strong NPD-led category turnover.

At the same time, perfectly targeted and carefully created innovation is helping to bring new shoppers



into the category and drive valuable engagement. "Cauldron's Express Tofu range bridges a gap between ingredient and finished product, with pressed and ready-to-use formats in delicious flavour combinations and a speedy cook time of five minutes. Retailers striking this balance of innovation and trusted core lines are seeing the benefits of incremental sales growth," she says.

Plant-based meat continues to have an important role to play because it provides consumers with an option that

is tasty and satisfying as well as being quick and easy to cook, maintains Beyond Meat's Moffatt. "This lowers the barrier to entry for consumers who wish to reduce their animal meat intake but are worried about missing out on the taste, texture and satiation that they get from animal meat, and who live busy lives so value ease of cooking and the ability to integrate plant-based options into traditional and familiar dishes," she says.

High-cost pressures may also lead

# Convenience plays an increasing role



Convenience is playing an increasingly vital role in plant-based product development, particularly as shoppers look for quicker, simpler meal solutions that fit into busy lifestyles, says Cauldron Foods' Grogut. "This is especially relevant in a category like tofu, where perceived complexity is one of the most common barriers to purchase," she says. "Despite being the fastest-growing sector<sup>i</sup>, now worth £57.5m<sup>ii</sup>, consumer research highlights that tofu is still often seen as difficult to cook and prepare, with concerns centred around achieving flavour and avoiding poor cooking outcomes," she adds. "Cauldron's Express Tofu range was developed specifically to meet these needs, offering pre-pressed, flavour-led options that remove complexity from the cooking process. By focusing on ease of use, strong flavour profiles, and quicker

preparation times, these innovations are helping to reposition tofu within the convenience space."

"Convenience has become one of the most influential drivers in plant-based purchasing decisions," says The Compleat Food Group's Fordham. "Research shows the category still feels like a destination aisle<sup>iii</sup>, requiring an intentional visit that limits casual pick-ups. The best way to overcome this is through formats that are ready-to-use, intuitive and inspiring. Our ready-to-eat ranges show this: Squeaky Bean's Tuna-Style Flakes and Bacon-Style Strips, for example, help consumers create sandwiches, salads and snacks with minimal effort, while the Pastrami Style Slices provide a high-protein option that works well for on-the-go eating. Elsewhere, Wall's Vegan Jumbo Roll as the leading single-eat plant-based pastry item<sup>iv</sup>, demonstrates

that familiar, hand-held formats can deliver strong results when the taste excels.

"Across the wider market, tofu slices, pieces and multi-use formats are gaining momentum because they make plant-based food feel straightforward and versatile," he adds. "Our innovation focuses on products that consumers can use immediately, ensuring that plant-based becomes as easy and everyday as any other category."

With gluten-free now more embedded in everyday eating habits, particularly for younger and more time-poor consumers, they are looking for formats that fit into their routines – whether that's lunch, food-to-go or quick meals, says Juvela's Cain. "Products like sub rolls and sandwich carriers are key to unlocking those occasions, which have historically been underdeveloped."

"Convenience remains a key driver, but it must

be balanced with quality and health," says The Tofoo Co's Knibbs. "Today's shoppers are looking for quick, easy meal solutions that don't compromise on nutrition or taste. In response, we're developing products that fit seamlessly into busy lifestyles, from pre-marinated tofu to options designed for air frying and stir frying in minutes. The goal is to make plant-based eating both effortless and accessible.

"That said, it's not a one-way shift towards convenience," he adds. "Interestingly, the ingredients segment now holds a 31% share of the chilled meat-free category<sup>v</sup> and is one of the few areas still in growth, up +4.2%<sup>vi</sup>. This highlights a more nuanced behaviour: while consumers value convenience, they are also willing to invest time in cooking plant-based meals from scratch, moving away from more processed shortcuts like burgers and sausages."

to a shift in consumer habits, observes Moffatt. "If the category starts to see price parity or pricing benefit versus the meat equivalent, the perception of the meat-free category being expensive may become a thing of the past, and consumers may look to the category as a money-saving opportunity," she says. "Environmental concerns may also continue to shape future decision making around food choices, as we look for more sustainable food options for a growing global population."

The next year will be shaped most strongly by consumers' demand for protein-rich, satisfying products that feel like proper meal components rather than alternatives, says The Compleat Food Group's Fordham. "Protein credibility is therefore essential, and our upcoming innovations, including new mince-style options and continued development in plant-based fish, are centred around meeting that need.

"Versatility will also become a major growth driver," he adds. "Options

that slot naturally into multiple meal occasions will help to normalise plant-based within broader household routines. This shift is already visible in the growth of tofu and tempeh, as well as the continued strength of ready-to-eat formats. Meanwhile, cues like fibre, fermentation and nutrient density help to reinforce that a meal is both good to eat and good for you. This trend is particularly relevant given the growing number of GLP-1 users in the UK who are actively seeking healthier,

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nutrient-dense foods that keep them feeling full while still delivering on great taste. With 69% of GLP-1 users reducing their snacking occasions<sup>19</sup>, categories like nuts are emerging as key beneficiaries.”

### Dialling up the flavour

While unflavoured items remain the top-selling items in the meat-free category, we are seeing growth drivers being flavour profiles such as ‘smoked’, ‘chargrill’ or ‘smokey BBQ’, which are common flavours, but remain to be favourites, says Beyond Meat’s Moffatt. “In terms of groundbreaking new flavours, the category remains rather traditional, with large room and opportunity for innovations that tap into emerging food trends and cuisines, particularly considering that Brits are known for their adoption of global flavours,” she says. “We have seen significant appetite among consumers for spicy and Mexican-style flavour profiles, with Beyond Burger Jalapeño, which we launched in 2024, now the No.2 branded plant-based burger in the chilled category (after the original Beyond Burger)<sup>20</sup>.”

Cauldron Foods’ Grogut agrees that consumers are actively seeking bold, globally inspired flavours that elevate the eating experience at home. “Asian flavours are proving particularly popular, with products such as Cauldron Express Garlic & Ginger Marinated Tofu and Teriyaki Marinated Tofu resonating strongly with shoppers,” she says. “These options tap into demand for takeaway inspired meals that tick boxes on convenience and flavour and tap into the £1.2bn Asian meal occasions in the UK<sup>21</sup>.”

“At the same time, fresh flavours and al fresco dining gain traction during the warmer summer months, where shoppers are looking at more premium and occasion-tailored ranges. Cauldron’s new Express Grillable range, featuring Oregano & Thyme and Smoky BBQ flavours ... align with outdoor dining, summer occasions, and a more experiential style of eating.”

In gluten-free meanwhile, there’s a clear shift towards more flavoured options, particularly in everyday formats, says Juvela’s Cain. “Trends such as spicy and ‘swicy’ flavour profiles – combining heat with sweetness, like chilli and honey – are starting to come through, alongside



more indulgent ingredients like cheese,” he says. “These are helping to move the category beyond purely functional products and into something more enjoyable and relevant.”

Consumers expect and demand both taste and health in the free-from category, says Nairn’s Butterworth. “With these higher expectations, brands need to continue to bring exciting flavours and formats to maintain consumer relevance and spend, and grow sales. Flavour can play a different role depending on the category. In free-from sweet biscuits, for example... we find chocolate flavours have an important role for

shoppers. We continue to develop new flavours and formats to meet changing consumer needs and occasions i.e. Christmas specific products.”

Ingredients such as beans, legumes and seeds are attracting growing interest, particularly as consumers become more aware of the benefits of fibre, protein and the role of diverse plant ingredients in a balanced diet, notes The Compleat Food Group’s Fordham. “Fermented ingredients are also gaining traction. Combining the freshness and acidity of ferments with a kick, such as in Vadasz Smacked Cucumbers, resonates strongly with shoppers looking to add a touch of global influence to their plate. In meat alternatives, demand is growing for products with rich, umami depth.”

### Key message to retailers

Looking ahead, the most exciting opportunities for retailers lie in a combination of bold flavours and versatile formats, says Cauldron Foods’ Grogut. “Products that can deliver on taste without compromising on

**“In meat-free, the category remains rather traditional with a major opportunity for innovations that tap into emerging food cuisines such as global flavours”**



convenience are likely to drive the next wave of category success,” she advises.

Retailers need to know that it’s non-negotiable for plant-based products to deliver on consumer taste expectations, says Moffatt at Beyond Meat. “Research shows that, after a negative taste experience, it often takes a year for consumers to be persuaded to come back to the category and try plant-based products again,” she says. “With taste perception already a lingering hurdle that plant-based and vegan foods need to overcome, it’s key that retailers focus on listing SKUs that not only deliver on health and environmental benefits, but which consumers will also enjoy and be inclined to buy again – thus also strengthening the overall taste perception for the total category.”

Back in 2016, the tofu category was worth just £7m<sup>22</sup>, reports The Tofoo Co’s Knibbs. “We set out with a clear vision: to champion tofu, break down barriers and get more people to fall in love with it. Our original ambition was to grow the category to £40m but today it has

surpassed £65m<sup>23</sup> and shows no sign of slowing down. The message to retailers is simple: prioritise segments that align with evolving consumer expectations. Products that are minimally processed, versatile, and trusted will drive sustained growth and tofu is leading the way. Ensure space allocation and in-store positioning reflect these high-performing areas. Where possible, create additional off-shelf displays to maximise visibility and reach. This is key to attracting new, ‘tofucurious’ shoppers who may not yet be visiting the category aisle, helping to drive both penetration and long-term growth.”

The free-from fixture is a shop-in-shop and a critical location for those living with allergies and intolerances, says Dove Farm Foods’ Marriage. “Therefore, focusing the space on genuine free-from offerings across all allergen-challenged categories, such as home baking, pasta, breakfast cereal, bread, cookies chocolate and others should be the priority,” she notes. “We have recently seen one retailer move all non-truly free-from snack bars out of the fixture to provide more space and variety in free-from categories.”

At Warburtons, Hook doffs his hat to the success of the dairy alternatives category, which he says has done “a great job of serving those that follow a dairy- or lactose-free diet while bridging the gap for those who want to reduce or replace dairy products without compromise on quality or taste”. Warburtons’ ambition for its free-from bakery range has always been to ensure it is continuously innovating, enabling the business to give consumers access to a range of quality free-from products that they are able to enjoy without compromising on taste, he adds.

Nairn’s Butterworth hopes retailers would seek to allocate more space for free-from in-store both at the main fixture and in secondary locations. “More consumers are looking to adopt gluten-free diets, and it remains a significant opportunity,” he notes. “This can be delivered through continued collaboration and partnering with manufacturers to truly understand shopper and consumer needs and what makes this fixture unique. It also involves market insights, continuous range optimisation (given the limited shelf space), innovation, and category and brand activation to call out features

and benefits in a way that resonates with shoppers and consumers.”

Gluten-free bakery remains one of the most important and high-frequency segments within free-from because of its role in everyday consumption, notes Juvela’s Cain. “The biggest opportunity for retailers is to focus on the core – loaves, rolls and lunch formats – while broadening the category’s appeal,” he says. “There is clear headroom to attract younger and more mainstream shoppers by offering products that feel closer to standard bakery in both quality and relevance.

“The category has done a good job of being functional, but not always a good job of being interesting,” he adds. “Historically much of it has lacked brand personality or emotional connection, and many shoppers don’t feel existing brands really resonate with them. There is a clear opportunity to introduce brands that bring more energy, personality and a sense of enjoyment into the fixture – helping to make the category feel more engaging, and ultimately driving greater penetration and repeat purchase.”

Plant-based will only reach its full potential when it becomes easy, delicious and good value for everyday meals, sums up The Compleat Food Group’s Fordham. “Economic pressures mean that shoppers are scrutinising price more closely than ever, with 29% believing they’ll be worse off financially in the year ahead<sup>24</sup>,” he notes. “With consumers already comparing plant-based with the cost of their usual meat options, getting promotional strategies right is essential if retailers want to encourage trial. When value and taste come together ... the category proves it can outperform the market.”

#### Sources

- <sup>1,2</sup> Nielsen RMS, GB Total Coverage, Meat Free Tofu (Quorn Foods defined), Latest MAT to 01.11.25 vs previous MATs
  - <sup>3</sup> Nielsen RMS, GB Total Coverage, Meat Free Chilled Tofu (Quorn Foods defined), Latest MAT to 01.11.25 vs YA
  - <sup>4,5</sup> NielsenIQ Scantrack, 21.02.26
  - <sup>6,7</sup> Nielsen, UK, w/e 21.03.26
  - <sup>8</sup> NielsenIQ, 52 w/e 21.02.26
  - <sup>9</sup> NielsenIQ, 12 w/e 21.02.26
  - <sup>10-11</sup> See 8
  - <sup>12</sup> Plant Futures Collective, 2025
  - <sup>13</sup> NielsenIQ, Total coverage, Wrapped gluten-free bakery, Unit sales YoY, 52 w/e 21.03.26
  - <sup>14</sup> NielsenIQ, Grocery Multis, 26 w/e 21.03.26
  - <sup>15-17</sup> NielsenIQ, Total Coverage, 12 w/e 21.02.26
  - <sup>18</sup> Dove Farm Foods, internal company data
  - <sup>19</sup> IGD, January & February 2026
  - <sup>20</sup> See 6-7
  - <sup>21</sup> Nielsen RMS, GB Total Coverage, 2025
  - <sup>22</sup> Kantar Worldpanel, UK Meat Free Market, 11.10.2015
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  - <sup>24</sup> IGD, January 2026
- Convenience role**
- <sup>1</sup> NIQ, %2 w/e 01.11.25
  - <sup>11</sup> Nielsen RMS, GB Total Coverage, Meat Free Chilled Tofu (Quorn Foods defined), Latest MAT to 01.11.25 vs 2021
  - <sup>13</sup> See 12
  - <sup>14</sup> See 8
  - <sup>15-17</sup> See 23

# Expanding its UK product line-up

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**KEY PRODUCTS**

**Beyond Burger®**  
**Beyond Burger®**  
**Smash-Style**  
**Beyond Burger®** Jalapeño  
**Beyond Mince®**  
**Beyond Meatballs®**  
**Beyond Steak Pieces™**  
**Beyond Sausage®**  
**Beyond Tenders™**

**Source**

<sup>1</sup> Nielsen data, UK chilled & frozen, w/e 21.03.26

↙ In 2026, plant-based powerhouse Beyond Meat, maker of the famed Beyond Burger – the No.1 branded plant-based burger in the UK<sup>1</sup> – is expanding its portfolio of delicious, high-protein plant-based meats, bringing consumers the Beyond Meat taste and quality they know and love across even more options, says Elaine Moffatt, regional sales manager UK & Ireland retail.

“In January this year, we launched Beyond Tenders, a crunchy-on-the-outside, juicy-on-the-inside frozen breaded tender, into select Tesco and Sainsbury’s stores and online,” she reveals. “Already heralded by consumers for its convincing chicken-like taste and meaty bite, this launch is followed by a new and improved Beyond Sausage recipe – a juicy, meaty product that offers a great option for both quick weekday dinners or on the BBQ this summer. With 14g of protein and less than 1g salt per 100g, it meets consumer demand for high protein content.”



“Our new Beyond Sausage recipe meets current demand for high protein content”

Beyond Meat also unveiled a new pack design earlier this year, with a focus on taste and mouthwatering product photography front and centre, delivering exceptional shelf-edge standout, says Moffatt.

“We have exciting marketing plans this summer and further innovation on the way, building on the success of our burger portfolio with a new on-trend flavour. So, watch this space!”

**BEYOND MEAT**  
**ALL TASTE NO WORRIES**

**HIGH IN PROTEIN**



# Making tofu deliciously accessible

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**Cauldron™**  
– **Express Marinated Tofu range** in Teriyaki and Ginger & Garlic flavours (160g, RRP £2.75\*)  
– **Express Grillable Tofu range** in Oregano & Thyme and Smoky BBQ flavours (180g, RRP £2.30\*)

\*Pricing set at retailer discretion

➤ Tofu has been on an upward trajectory in recent years, driven by growing consumer demand, flavour-focused innovation and stronger activation in-store and online. Despite this, research has identified that many consumers think tofu is tricky to cook and prepare. So, Cauldron Foods is creating bold and inviting flavours, that remove the perceived ‘faff’ of tofu usage, delivering something genuinely distinctive in a competitive category, says marketing director Lucy Grogut.

“This year, Cauldron launched the Express Tofu range (see details left), created to make tofu easier and more accessible, without compromising on taste,” she says. “Using plant alchemy knowhow, Cauldron has developed flavour combinations that make it easy to create delicious dishes. Each product has a five-minute cook time, and their convenient pressed formats give consumers the tofu ‘ta-da’ moment they’ve been missing.”



“Our Express Tofu brings the ‘ta-da’ moment consumers have been missing”

Over the past year, Cauldron has seen encouraging improvements in how shoppers view the brand across key metrics such as taste, quality, value and health<sup>1</sup>. Supported by targeted marketing and engaging social media activation, Cauldron is giving retailers the tools to ensure the category continues to attract new shoppers, and drive repeat purchase.

**Source**

<sup>1</sup> Blue Yonder Brand Tracking YoY

**Flavour in a flash**

**CAULDRON Express**  
Garlic & Ginger Marinated Tofu  
HIGH IN PROTEIN  
COOKS IN 5 MINUTES

**CAULDRON Express**  
Oregano & Thyme Grillable Tofu  
HIGH IN PROTEIN  
COOKS IN 5 MINUTES

**CAULDRON Express**  
Smoky BBQ Grillable Tofu  
HIGH IN PROTEIN  
COOKS IN 5 MINUTES

**CAULDRON Express**  
Teriyaki Marinated Tofu  
HIGH IN PROTEIN  
COOKS IN 5 MINUTES

**Tofu that sells as fast as it cooks, stock up now**

# Committed to free-from innovation

## DETAILS

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**Thomas Barkholt**  
Head of Marketing  
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Head of Sales

## KEY BRANDS

Gluten Free Flour  
Gluten Free Pasta  
Gluten Free Breakfast Cereals  
Gluten Free Oat Bars  
Gluten Free Baking Essentials  
Gluten Free Baking Mixes  
Gluten Free Cookies

One of the original free-from pioneers, UK based and family-owned brand Freee has been a leading player in gluten-free foods for more than 40 years. Its naturally gluten-free range spans home-baking, breakfast cereal, pasta, snack bars and cookies, and the brand continues to bring innovation to the market to deliver on its mission to make gluten-free living deliciously simple.

Building on strong performance in its ready-to-eat breakfast cereals range at +7.2 percentage points<sup>1</sup> versus the category, Freee recently launched two new gluten-free mueslis. An overlooked segment within the free-from category, Freee is excited to introduce a category-first Swiss Style Muesli, using innovative ingredients such as oat flour and tigernuts alongside an indulgent Chocolate Muesli variety, reveals founder Clare Marriage. Both mueslis are already on Ocado, while Freee Swiss Style Muesli rolls out into Tesco in May. They join established favourites Chocolate Stars, Cinnamon Hoops and Fibre Flakes. Freee makes all its cereal in-house in dedicated facilities ensuring consistent and safe gluten-free quality.

In home-baking, where Freee is already the No.1 gluten free flour<sup>2</sup>, the brand relaunched its entire baking mixes line-up. A fresh new design was introduced and the range moved to



“With muesli an overlooked segment within the free-from category, Freee is excited to introduce a category-first Swiss Style Muesli, using innovative ingredients such as oat flour and tigernuts”

a bag-in-box solution for better shelf standout. The refresh included three new mixes including a Crumble Mix, Yorkshire Pudding Mix and, uniquely, a gluten-free Dumpling Mix for the first time, providing free-from shoppers a simple way to add delicious dumplings to their favourite dishes.

In snacking, Freee had another stand-out year, growing 26.5%<sup>3</sup> with its flapjack oat bars as both distribution and rate of sale grew. “High in fibre and made without any of the top 14 allergens, they are among few truly free-from bars in the free-from aisle,” says Marriage. “In October, the range was extended with two Kids Oaty Bar versions. Smaller in size, with nothing artificial and made without any of the top 14 allergens, they are perfect for school lunchboxes and snack times alike,” she adds.

Following a significant investment in setting up its own gluten-free pasta factory in Italy, Freee staged a major relaunch of its gluten-free pasta in the second half of last year. An improved pack format was accompanied by a refreshed pack design, and the brand launched new varieties to broaden consumer choice.

The relaunch was supported by a major ‘try me free’ campaign to encourage trial of the new range. As shoppers increasingly look beyond wheat pasta, Freee is planning to bring further exciting new news into the pasta space in the coming year.



Source  
<sup>1</sup> NIQ, Groc Mults, 52 w/e  
21.03.26

# Goodbye gluten,

# hello delicious!



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# Don't overlunch your think!

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Head of Sales

**KEY BRANDS**

**OAF Gluten Free**  
– White Softie Loaf  
– Cheese & Herb Super Softie Sub Rolls  
– White Super Softie Sub Rolls  
– The Big Cheese Loaf  
– Super Soft N Cheesy Rolls  
– Jalapeño N Cheddar Rolls

“When we first looked at the gluten-free category a couple of years ago, it was already well established – but it wasn't exactly exciting,” says Juvela head of sales Matthew Cain. “The fixture had nothing wrong with it, it was just a bit dull: lots of beige; lots of explaining; not much to get excited about. So we did the opposite, launching OAF in July 2025.”

Something in the category was missing – not just better products, but more personality, more energy and more reasons for shoppers to engage with it, he says. “Too much of gluten-free had become about what products don't contain, rather than why you'd choose them,” he observes. “So we took a different approach.”

Alongside improving product quality, Juvela set out to build a stand-out brand that feels more personality-led, more confident and far less serious than the category norm. After all, bread without gluten is still bread – and it should feel like it. “That thinking sits behind our ‘Be More OAF’ approach,” notes Cain. “It's about stripping away the overthinking that surrounds gluten-free, simplifying the category and putting the focus back on enjoyment.”

This approach carries through into both product and brand, he adds. “From a product perspective, the focus has been on delivering a more mainstream bread experience – soft, usable, everyday formats that work as part of normal life. As for the brand, OAF is designed to be brighter, more distinctive and harder to ignore.

“And it's working. Since launch, and despite only being listed in Tesco, the brand is on track to surpass £1m in retail sales value in its first year<sup>1</sup>. Fewer than 1% of products across UK grocery and convenience reach that level annually<sup>2</sup>, highlighting the strength of early consumer demand.”

At the same time, the shopper is changing. “Younger and time-poor consumers are entering gluten-free, looking for something quick, familiar



“Too much of gluten-free had become about what products don't contain, rather than why you'd choose them. So we took a different approach”

and enjoyable. Not all of them require full 14-allergen solutions; many simply want great-tasting gluten-free food that fits easily into their routine,” he says. “We've also expanded our presence in retail, including the recent rollout of our Super Softie Sub Rolls into Asda, helping to unlock lunch and food-to-go occasions that, historically, have been underdeveloped. Looking ahead, we're building on that with more flavour.”

From late April, Juvela is launching a new range of cheese and spice-led products into Tesco, including an unsliced cheese loaf and flavoured rolls. “Flavour has been underplayed in the category for a long time,” says Cain. “Cheese, spice and bolder combinations like jalapeño and cheddar give people something they actually want to come back for. It's also key to attracting a broader, younger audience who are looking for something that feels a bit more exciting and less like a compromise.”

Ultimately, this will fashion the next phase of growth in gluten-free bakery, he says. “That means better everyday products, more relevant formats and brands that people actually want to pick up.

“So remember, Don't overlunch your think!”



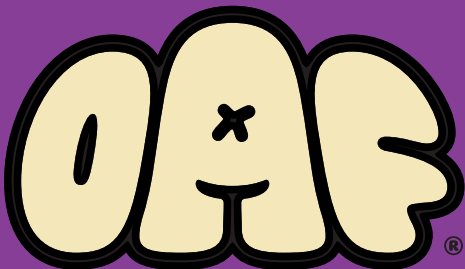
**Source**

<sup>1</sup> Internal company data  
<sup>2</sup> NielsenIQ Million Club. Fewer than 1% of companies trading across 55k UK grocery and convenience stores surpass £1m in RSV in their first year



# STOCK OAF. STUPID.

**WE'RE ALREADY BREADILY AVAILABLE  
IN BIG TESCO AND ASDA**



**STUPIDLY TASTY  
GLUTEN FREE**

# Naturally better for you

**DETAILS**

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Managing Director  
**Kevin Butterworth**  
Marketing Director  
**Paddy Cronin**  
Commercial Director

**KEY BRANDS**

**Sweet and savoury biscuits and snacks**  
– Oatcakes  
– Crackers  
– Flatbreads  
– Mini Bakes  
– Biscuit Breaks  
– Cereal  
– Oaties

At Nairn's, we're not just making delicious gluten-free products, we're setting the standard, says marketing director Kevin Butterworth. "As the brand leader in gluten-free<sup>1</sup>, we're constantly innovating to bring consumers the best in taste, texture and variety. "From everyday snacks to special treats, our range is packed with flavour, offering something delicious and full of the goodness of gluten-free wholegrain oats for every occasion. With trusted ingredients and a passion for great taste, Nairn's proves that gluten-free means no compromise – just great products everyone can enjoy."

**Award-winning products**

Nairn's prides itself on offering a range of products that taste amazing and just happen to be gluten-free, he adds. "But don't just take our word for it as our products have won numerous Free From Food awards and Great Taste awards," he says. "We believe that snacks should taste great and be better for you as well. That is why all of our products are made from gluten-free wholegrain oats that are brought together with simple and natural ingredients, so consumers know they are packing more of the good stuff in to every snack."

There is a continued shift in consumer behaviour as they look for better-for-you snacks that don't compromise on taste, notes Butterworth. "There is no longer a trade-off between taste or health, with consumers expecting snacks to deliver both," he observes. "At Nairn's we are well placed to meet this demand with our products both tasty and naturally full of goodness. We have commissioned research to better understand the consumer and the category and this has helped inform our brand activation and new product development.

"Over the last 12 months we have also invested to build consumer awareness and build in-store visibility. We have refreshed a large part of our gluten-free



**“We believe that snacks should taste great and be better for you as well”**

product packaging to build taste credentials and improve on shelf visibility, dialling up motivating product claims where relevant.”

**Latest launches**

Nairn's also prides itself on innovation, with this being a key part of what the company does to better meet different consumer needs and occasions.

"Over the last 12 months we have successfully launched Snaks and Moments, and Mini Cheese Bakes has been one of the most successful launches seen in the category in recent years," reveals Butterworth. "It has achieved a 12% share of free-from savoury snacks with a high repeat rate of 80%<sup>2</sup>. Building off this positive momentum we have recently launched Mini Choc Chip Bakes – a mini sweet biscuit snack that is perfect for on-the-go or as a light snack at home," he adds.

"All of our gluten-free products are made in a dedicated facility that ensures the highest quality and safety for consumers."



**Source**  
<sup>1</sup> Nairn's U&A research, 2025  
<sup>2</sup> Nielsen data, 52 w/e 28.03.26

# THE NEW MINI BAKES ON THE BLOCK

Enjoy gluten-free goodness on the go with our brand-new Choc Chip Mini Bakes. Mini, moreish and made from wholegrain oats and real chocolate, these bitesize treats are bursting with flavour.

**NEW**

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sugar\***

**Real dark  
chocolate**

**n**  
nairn's  
**Mini  
CHOC CHIP  
BAKES**

**45g e**



**Made with wholegrain oats**



**Certified Gluten Free**



**In store now**

[nairns.com](https://nairns.com)

\*see website for details

**n**  
nairn's

# Accelerating category growth

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Pork Farms  
The Real Yorkshire  
Pudding Co.  
Wrights  
Unearthed  
Vadasz  
Yolk Folk  
Squeaky Bean  
Palace Culture  
Julienne Bruno  
Harvey & Brockless

➔ The Compleat Food Group is home to Britain's favourite plant-based brands, says chief marketing officer Yvonne Adam. "Everything we create is driven by great taste, quality and a deep understanding of how people want to eat today," she notes. "This approach underpins our mission to create 'Food to Feel Good', and has shaped our market-leading brands."

Squeaky Bean, the company's hero plant-based brand, is outperforming the market, up +5.8% in value in the past year<sup>1</sup>, reveals Adam. "Consumers increasingly want food that feels satisfying and nourishing, with protein and fibre now key cues influencing choice. Squeaky Bean has responded quickly to this insight by strengthening its nutritional communication, including clearer on-pack high-protein and high-fibre messaging on products such as its Pastrami-Style Slices, which contains at least 27g protein per pack.

"Alongside this, best-selling products like Tuna-Style Flakes and Bacon-Style Strips continue to win repeat purchase by offering versatile protein formats that fit effortlessly into meals ranging from lunchtime salads to midweek dinners."

Meanwhile, growing consumer interest in gut health has inspired Squeaky Bean's fermented vegetable pies, with the Spanish Chorizo-Style Pie and Braised Veggie Pie combining probiotic-rich vegetables with bold savoury flavours.

Fermentation-led insight is also powering growth for Vadasz, the UK's No.1 chilled pickles and ferments brand, which has seen strong momentum, at +15.2% in value<sup>2</sup>. "Its award-winning, live-cultured range, including Kimchi and Super-Beet Kimchi, brings gut-friendly benefits along with crunch, colour and deliciousness to meals," says Adam.

Palace Culture taps into the fermentation story in a different part of the plant-based fixture, with flavour-first nut-based cheeses crafted from live-cultured fermented nuts. "With Great Taste awards across its Kimcheeze and The Goat, the brand shows how consumers will confidently trade up when



“Innovation is driven by great taste, quality and an understanding of how people want to eat”

plant-based delivers something exciting and distinctive,” she says.

Adding to The Compleat Food Group's plant-based cheese line-up is Julienne Bruno, relaunching this month. As well as its return to Ocado, the brand's high-quality and versatile plant-based products are widely chosen by chefs, cementing its position as a leading foodservice brand.

Consumer-led thinking also runs through our pastry brands,” says Adam. “Pork Farms has reformulated its market-leading Porkless Pie, improving taste and texture. At Wall's Pastry, our Vegan Jumbo Roll remains No.1 in the category<sup>3</sup>, winning repeat shoppers as a great-tasting option in food-to-go.

“Grounded in insight into what people genuinely want to eat, and delivered through great taste and quality, our innovation is driving growth in the plant-based category.”



Source  
<sup>1,3</sup> NIQ 52 w/e 21.02.26

# HOME TO BRITAIN'S FAVOURITE PLANT-BASED BRANDS



THE  
**COMPLEAT**  
**FOOD** GROUP

## FOOD TO FEEL GOOD

[www.compleatfood.com](http://www.compleatfood.com)

The Compleat Food Group 

# Evolution to a new chapter

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**KEY BRANDS**

**Tofoo & Co**  
**Wheaty**

As The Tofoo Co marks its 10-year anniversary, the brand is emerging as one of the UK’s standout plant-based success stories, and shows no signs of slowing down. What began as a challenger tofu brand has evolved into a clear category leader, now holding more than 50% share of the UK tofu market and ranking as the second biggest brand in chilled meat-free<sup>1</sup>.

“The company has built a reputation for doing things differently, focusing on simple, natural ingredients and bold, irreverent branding,” says co-founder and CEO David Knibbs. “Over the past decade, that formula has paid off, with the business scaling rapidly and, more recently, attracting investment to accelerate its next phase of growth.”

That momentum has continued into 2026, with a landmark move into Europe through the acquisition of German plant-based pioneer Topas, best known for its Wheaty brand. “The deal significantly strengthens The Tofoo Co’s position in natural plant proteins and provides access to established manufacturing and distribution across key European markets,” notes Knibbs. “It also reflects a clear ambition to take our less processed, more natural proposition beyond the UK.”

By bringing Wheaty into the fold, the company is also broadening its seitan portfolio, strengthening its credentials in wholefood, plant-based proteins at a time when consumers are increasingly moving away from ultra-processed alternatives.

Back home, the brand is stepping boldly into its next chapter, kicking off with a rebrand to Tofoo & Co. This marks an exciting evolution from tofu pioneer to a broader force in natural plant-based protein. At the same time, a striking new pack design is rolling out across both core and added-value ranges, dialling up shelf impact, sharpening consistency and amplifying the brand’s trademark personality.

This is all being brought to life through a major new advertising and sampling campaign, ‘You Too Can Foo’, a confident, high-energy push to inspire a new wave of consumers to embrace meat-free, he reveals. “The



“The message is simple: cooking with tofu doesn’t have to be intimidating – it is easy, inspiring and genuinely exciting, whoever you are”

message is simple; cooking with tofu doesn’t have to be intimidating – it is easy, inspiring and genuinely exciting, whoever you are,” he says.

Innovation remains central to the brand’s strategy. The goal is clear; to make tofu more accessible to a broader audience while retaining the quality and simplicity that underpin the brand. The past year has seen strong success with its Stir Fry Tofoo, particularly as part of retailers’ meal deals, helping the brand reach new shoppers who might not typically visit the meat-free fixture. Upcoming launches will focus on convenience, flavour and versatility, including marinated tempeh, silken tofu, and two new sausage products.

“Together, these moves underline a business that is not just riding the plant-based wave but actively reshaping it,” says Knibbs. “We have benefited from a shift towards cleaner-label, less processed foods, a space we’ve occupied since day one. Our upweighted marketing campaign and refreshed packaging will help drive penetration further.

“Ten years in, The Tofoo Co is no longer a disruptor on the fringes; it is a category leader with scale, a growing international footprint, and a clear view on where plant-based is heading next.”

Source  
<sup>1</sup> Nielsen IQ Scantrack, 21.02.26

YOU TOO CAN

FOOO



# Quality and choice in bakery

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Director, Warburtons  
Gluten Free

## KEY BRANDS

GF Soft Sliced Brioche Rolls  
GF Super Soft White Rolls  
GF Super Soft Seeded Rolls  
GF Cinnamon &  
Raisin Fruity Buns  
GF White Wraps  
GF Soft White Pittas  
GF Soft Brown Pittas  
GF Crumpets  
GF White Thins  
GF 300g White Loaf  
GF 300g Seeded Loaf  
GF White Tiger Bloomer  
GF Seeded Tiger Bloomer  
GF White Bloomer  
with Sourdough  
**NEW:** GF Farmhouse Tiger  
**NEW:** GF Farmhouse  
Original White  
**NEW:** GF Farmhouse  
Super Seeded  
**NEW:** GF Soft White  
Flatbreads

➔ The free-from bakery market is almost unrecognisable to where it was 15 years ago when Warburtons started out on its gluten-free journey. It has changed, not just in terms of size and scale, but, and perhaps most importantly, in terms of the quality and range of products produced for consumers following a gluten-free diet. Gone are the days of crumbly gluten-free bread; today, Warburtons Gluten Free bakes a range of 18 high-quality products, from Tiger Bloomer to crumpets, rolls, fruity buns, thins and pittas, reveals director Chris Hook.

## Outpacing the category

Warburtons Gluten Free has grown significantly in the last 15 years and is now Britain's No.1 gluten-free bakery brand, holding over 29% share of the market<sup>1</sup>. In the last year, Warburtons has achieved remarkable growth in the free-from bakery sector, with sales increasing by 5% in the last 12 weeks alone<sup>2</sup>, significantly outpacing total gluten-free bakery, which has stayed flat versus last year.

“Our success has been driven by our commitment to providing high-quality products that taste great and by our focus on innovation, which has helped maintain strong consumer demand and overcome market challenges,” notes Hook.

Baking from a dedicated gluten-free bakery in Newburn, Warburtons Gluten Free has invested significantly in innovation to help make mealtimes more exciting for consumers. Hook comments: “Following a gluten-



“We are continually investing in our Gluten Free range and are launching several new products this year, which we are sure will delight our consumers and continue to grow the category”

free diet, doesn't mean you want to compromise on taste or choice and that's why our focus is on baking the best-quality products, and innovating to help keep mealtimes interesting.

“We are continually investing in our Gluten Free range and are launching several new products this year which we are sure will delight our consumers and continue to grow the category,” he adds.

## New arrivals

And consumers don't need to look too far ahead for new exciting products to boost their mealtimes, as Warburtons' strong pipeline of innovation has seen four new products hit the shelves this April – Gluten Free Greek Style Flatbreads and Gluten Free White, Super Seeded and Tiger Farmhouse loaves. All products are Coeliac UK-certified and uphold the same high-quality standards that Warburtons is known for.

“Historically, free-from shoppers have had to shop from a limited range of products, so it is fantastic to be able to launch more new products to market,” says Hook. “The free-from aisles have improved considerably, and we work closely with our retailers' partners to review space and ranges in-store so we can ensure shoppers can be genuinely excited about the products on offer within the free-from category.”



## Source

<sup>1</sup> NIQ, Total Coverage, Wrapped Gluten Free Bakery, unit sales, L52 w/e 21.03.26  
<sup>2</sup> NIQ, Total Coverage, Wrapped Gluten free Bakery, unit sales YoY, L12w/e 21.03.26

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