

# Free from & plant based



THE VEGAN FOOD GROUP

Making uncompromising plant-based food accessible to everyone, everywhere at every mealtime

Feeding the Future



# Investment for the future

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**VFC**  
**Clive's Purely Plants**  
**JUST Egg**

 Vegan Food Group (VFG) is setting out a bold vision for the plant-based category – grounded in consumer insight, forward-thinking partnerships and operational strength. As the category faces critical challenges, VFG is investing in the capabilities needed to help retailers reinvigorate the market, attract new and lapsed shoppers, and drive long-term growth.

At the heart of this is a renewed focus on solving the real-world challenges retailers face – from reducing wastage and price parity with meat, to delivering true innovation that excites consumers.

While its senior leadership team boasts more than 100 years of collective plant-based experience, with dedicated specialists across NPD, R&D and category, VFG is also investing in a bespoke project with Kantar to build an unrivalled understanding of the plant-based shopper, strengthening its data-led approach. “We’re motivated by what matters most to our customers,” says Richard Coggon, managing director of VFG UK. “That means offering commercially viable solutions, underpinned by data and research, that build a more resilient category.”

With a growing portfolio of brands – including Meatless Farm, VFC and Clive's Purely Plants – and fully scalable own-label production, VFG is able to deliver plant-based products across all shoppers' needs, from everyday value to premium tier. “Our ‘Good, Better, Best’ approach allows retailers to tailor ranges that increase basket value and encourage trade-up, while maintaining consistent quality across tiers,” says Coggon. “Taste, quality, value, versatility – these are the



**“Taste, quality, value, versatility – these are the levers that unlock repeat purchase. And we’re ready to deliver on those across both branded and own-label products”**

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VFG operates two BRC-rated manufacturing sites in the UK and Germany, the latter being the largest dedicated plant-based facility in Europe. Ongoing investment of £6.25m in automation and innovation is future-proofing production, while improving quality and consistency. “Our sites can handle everything from artisan seasonal pastry, veg-led ready meals and mainstream meat alternatives, to volumes of 600,000 cooking sauce jars a week,” says Coggon. “We can produce across chilled, frozen and ambient, with capability to expand into adjacent categories. We’re armed with flexibility and scale to support customer growth, improve operational stability, and increase the reach of vegan products across stores and menus.”

Recently, the business partnered with Eat.Just to bring Just Egg – the US’ No.1 plant-based liquid egg – to European markets, supported by an additional £5m investment in a new production line. It’s a clear signal of the company’s intent to lead in both category-defining innovation and operational delivery.

For retailers looking to reset and reignite the plant-based category, VFG stands ready as a strategic partner. “It’s about collaboration. If we get this right together, the opportunity is enormous,” concludes Coggon.





**THE VEGAN  
FOOD  
& GROUP**

# Solving the Plant-Based Puzzle

Delivering on quality, taste, value & versatility  
as a key partner in unlocking category growth



**THE TOTAL PLANT-BASED SOLUTION**



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## Analysis



It hasn't been the easiest few years for plant-based foods, although free-from seems to have held its ground more ably. For plant-based, however, a combination of factors – including their relatively higher cost and a negative perception on the ingredients used to make them – has seen the market take a tumble, as consumers (flexitarians in particular) watch their wallets.

Yet, there's a distinct air of optimism now creeping back into the sector, as suppliers shift the dial to meet shopper expectations on transparency and retailers start to show renewed interest. Suppliers are also identifying that their products increasingly need to be viewed as mainstream, not 'alternatives', if they are to entice consumers back to the table, making convenience and ease of use a priority.

Challenges for both the chilled and frozen meat alternatives sector of the plant-based market have led to the combined category experiencing a -7.7% decline, bringing it to £465.6m<sup>1</sup>, acknowledges Gillian Lapsley, category lead at Vegan Food Group (VFG). "A key factor behind this decline is the reduced shelf space for these products in stores, compounded by the impact of the cost-of-living crisis, which has heightened the price comparison between meat and meat alternatives," she observes. "Additionally, consumer concerns around ultra-processed foods (UPFs) have added to the challenge."

Despite this, there are promising areas within plant-based, she notes. "In fact, research shows that consumers are still looking for unique and interesting plant-based dishes with veg-centric cuisine

being a major macro trend<sup>2</sup>. Growth has been evident in the plant-based ingredients sector, particularly tofu and vegetable-led products, as well as in convenient offerings."

The plant-based market has seen overall category value decline of -8.9% over the last 52 weeks<sup>3</sup>, says Jason Fordham, customer insights director at The Compleat Food Group. "This can be attributed to several factors, notably the rising consumer awareness of UPFs," he says. "As consumers continue to educate themselves on food processing and additives, some are becoming wary of plant-based alternatives that may be perceived as overly processed and unhealthy, and therefore hesitate to purchase. Following the cost-of-living crisis, where we saw flexitarian consumers moving back to



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more affordable meat-based options, the category must work even harder to entice these savvy shoppers back and justify the rising costs of plant-based alternatives,” he notes.

Cauldron Foods UK head of brands Lucy Grogut points to increased awareness on topics such as health, sustainability and animal welfare, which she says are motivating shoppers to create new dietary habits. Within this, meat-free snacks are driving the category forwards, she notes: “It’s the highest recruitment sector<sup>4</sup>, bringing in the most new shoppers.

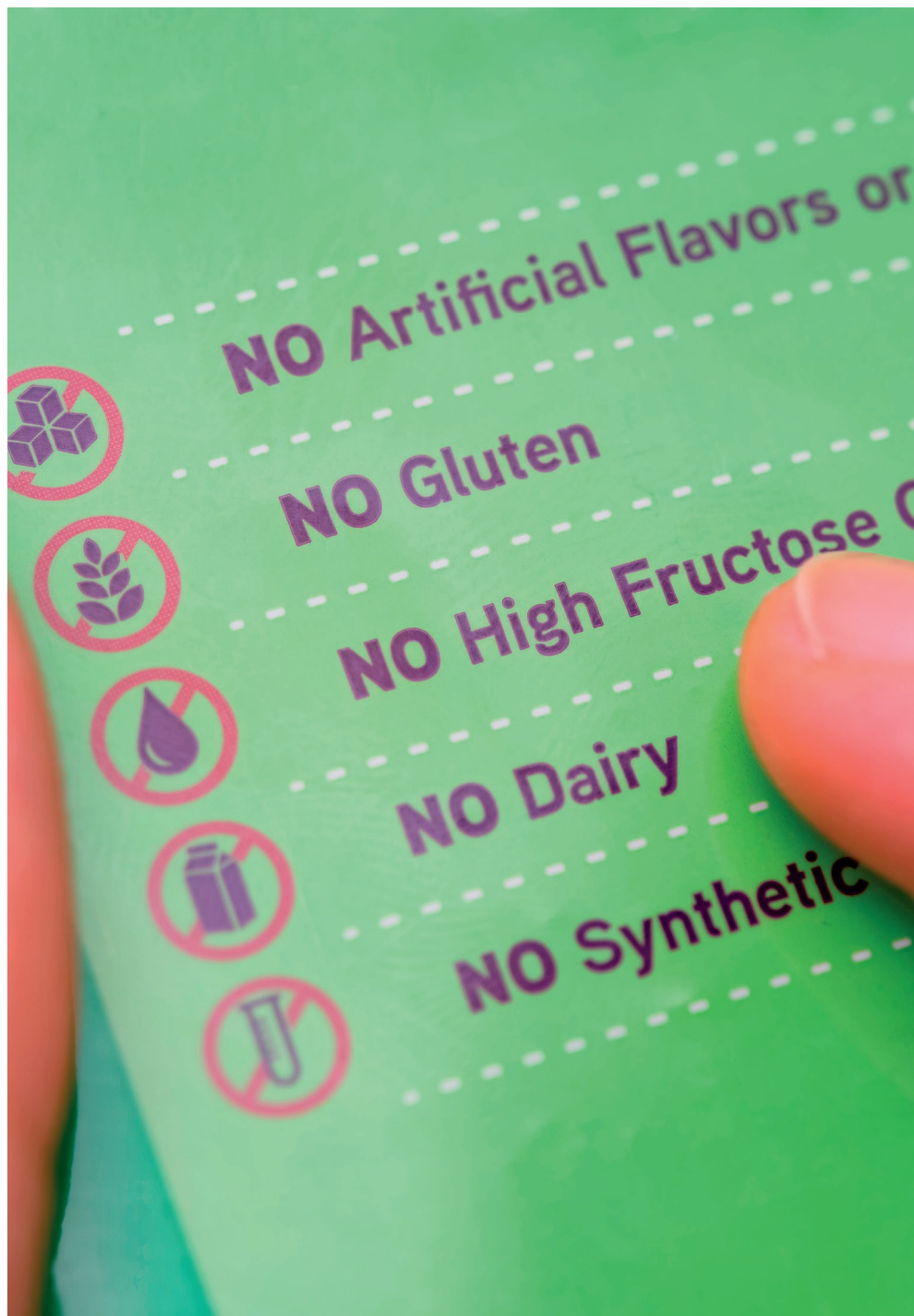
“Consistent flavour-packed NPD helps retailers drive penetration and frequency, enticing even more shoppers into the category and making sure they come back,” she adds, pointing to tofu as another sector that’s recruiting shoppers into plant-based, with 77,000 new buyers in the 12 weeks leading up to the end of January<sup>5</sup> alone.”

Ross Longton, co-founder at Tiba Tempeh admits the meat-free category has seen a decline, but says tempeh has defied the trend, “emerging as one of the fastest-growing sectors as consumers demand more natural and nutritious alternatives amid rising concerns over UPFs”, he says.

Meanwhile, according to Bel UK, the total UK plant-based alternatives to cheese category is worth £40.1m<sup>6</sup> and appeals to shoppers committed to making more conscious food choices. In fact, a recent UK study suggests the number of vegans has risen by around 1.1m since 2023<sup>7</sup>, with younger consumers – Gen Z in particular – more likely to follow a vegan diet,” it says.

Also on a positive note, a recent Mintel report, cited by Gosh! Food managing director Jason Belmont, predicts the plant-based category will grow in 2025 for the first time since 2021<sup>8</sup>, with mid- and higher-end market projections between +5% and +13% pa between 2025 and 2029<sup>9</sup>. Despite strong headwinds in recent years, “the emerging all-natural plant-based subcategory is primed to help revitalise the sector”, he says. “The increasing demand for all-natural plant-based foods is driven by the underlying macro trend of people trying to eat more healthily and prioritising all-natural ingredients and wholefoods. As reported by Mintel, 71% of adults try to eat healthily all or most of the time<sup>10</sup>.

“Flexitarian and plant-based diets




are now more mainstream, so it’s more important than ever for retailers to champion the plant-based category and the all-natural segment, broadening the appeal. Recent stats found 68% of adults find highly processed ‘meat subs’ off-putting, and nearly half reacted negatively to UPFs in early 2024<sup>11</sup>, so we need to move on from over-processed products and lead with a more positive vision to help people make healthier, more nutritious choices.”

### Free-from buoyancy

In the free-from market, meanwhile, Philip Rayner, founder and MD of Glebe Farm Foods reports that it continues to go from strength to strength – “now worth £3.85bn in the UK, with an impressive +2.4% growth, adding £421m to the category<sup>12</sup>”, he says. “This momentum reflects the increasing number of consumers making considered dietary choices – whether for health reasons, sustainability concerns



# UPFs: impact on the category



With UPFs an important consideration in product development, Vegan Food Group is seeing growing demand for cleaner labels and improved taste and texture, says Lapsley. “However, it’s important to acknowledge that there is currently no clear or consistent definition of what constitutes a UPF, nor conclusive evidence of causation when it comes to health impacts,” she says. “Rather than focusing on processing alone, we believe nutritional balance should remain the priority, limiting high in fat, sugar or salt content and including beneficial processes like fortification or fermentation that can support overall nutrition.”

The Compleat Food Group’s Fordham describes the backlash against UPFs as a “defining factor in plant-based purchasing decisions”. Increasing media coverage and government scrutiny have made consumers more aware of

processing methods and ingredients lists, he says. “As a result, cleaner-label products like tofu and tempeh are seeing strong growth, up 10.3% in the last 52 weeks<sup>i</sup>.”

Concerns about UPFs have been “a significant barrier” to consumers adopting a plant-based diet, impacting the growth of the meat-free category, notes Tiba Tempeh’s Longton. “To reignite this growth, brands and retailers must focus on offering more natural and nutritious options. Sectors such as tofu and tempeh have seen substantial growth due to their natural credentials and many brands are exploring the opportunity to adopt more clean-label practices, which will benefit the category overall.”

The UPF debate has also affected the perception of vegan products, which no longer carry the same health halo they once did,” he adds. “At Tiba Tempeh, we’ve shifted our focus to appeal to a broader audiences, including meat

reducers and foodie consumers seeking more natural and nutritious whole-food alternatives. While plant-based is still an important aspect, it is not the defining feature.”

Clean-label products have become more important than ever, particularly in response to increasing scrutiny around UPFs, says Glebe Farm Foods’ Rayner. “With 64% of consumers perceiving UPFs as unhealthy<sup>ii</sup>, there is a clear demand for brands to offer simple, transparent ingredients lists. However, the relationship with UPFs is complex: 43% of consumers still consume them multiple times a week, and cost remains a factor, especially in the current economic climate<sup>iii</sup>.”

The Covid pandemic made people more health-conscious and the food and drink they consume is obviously a big part of that, says Windmill Organics’ Ferguson. “When you add in the increased understanding about

the potential long-term health impacts of consuming too many UPFs, it’s no surprise a growing number of people want healthier, natural foods without chemical additives,” she notes. “Over 3m UK consumers are now actively avoiding UPFs<sup>iv</sup> and clean-label, products are clearly on the rise. Organic food is more relevant now than ever before, because it allows retailers to address this growing consumer concern about the impact of UPFs.”

There is a growing consumer awareness that UPF and artificial vegan and vegetarian foods are “not as healthy as they look, leading to an increase in demand for natural alternatives”, she adds. “In addition, plant-based foods sales have suffered as many of the products are expensive. “So, with the ongoing cost-of-living crisis, coupled with increasing concerns around UPFs, many consumers are turning to whole foods like beans and pulses as meat alternatives.”

or simply for better-quality products.”

Gluten-free remains a key driver, with 2.9m UK consumers now following a gluten-free diet, outnumbering the 676,000 diagnosed with coeliac disease<sup>13</sup>. “This underscores a shift towards gluten avoidance as a mainstream lifestyle choice rather than just a medical necessity,” he notes.

Meanwhile, dairy alternatives have seen notable shifts, with oat drinks now forming 46% of the category by

volume<sup>14</sup> – the only plant-based drink showing YOY growth<sup>15</sup>, he adds.

Over the last five years, the free-from category has grown, with a wide range of consumers now needing to – or indeed choosing to – purchase free-from products, says Chris Hook, free from director at Warburtons Gluten Free. “Sales of free-from bakery products have grown by 1.5% year on year<sup>16</sup>, with sandwich alternatives proving the most popular, at +20.6%

YOY<sup>17</sup>, post the launch of WGF’s Soft White Pittas in April 2024,” he says.

At a total level, we have continued to see good growth in free-from over the last 12 months, says Nairn’s Oatcakes marketing director Kevin Butterworth. “There has been growth across most categories with the largest in snacks (+10.1% value) and savoury biscuits (+11.1% value)<sup>18</sup>,” he says.

There is still significant opportunity to grow the free-from category, he adds.

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“The UK gluten-free foods market is anticipated to witness a CAGR of 8.7% from 2023 to 2030<sup>19</sup>,” he notes. However, consumers still have unmet needs and not all occasions are fully addressed. For example, repertoire is still lower than it could be (vs other category averages) at around two units per trip, meaning consumers are not finding everything they need when at fixture and there are still some concerns around the taste of free-from products.

Kirsty Henshaw, MD at Kirsty’s maintains takeaway is driving the growth for free-from as shoppers trade down from eating out due to the cost-of-living crisis<sup>20</sup>. “Free-from is bringing a highly loyal and regular shopper to the chilled ready meals category,” she says.

And Declan Lockett, MD UK & Ireland at Dr. Schär, points to heightened innovation and investment contributing to a steady 4% YOY<sup>21</sup> growth in gluten-free. At its specialist Glasgow bakery, the company looks to introduce exclusive innovations, recently introducing a gluten-free Marble Cake, alongside Madeleines and Choc Chip Muffins “contributing 30% to overall category growth<sup>22</sup>,” he reveals.

Gluten-free specialist Freee (Doves Farm Foods) also reports solid performance across the categories in which it operates, including home baking, breakfast cereals, pasta, snack bars and cookies. “For example, in the free-from aisle, gluten-free flour was up 3.3% in kg versus 2.1% kg growth in the regular aisle<sup>23</sup>,” says CEO and founder Clare Marriage. “We’ve also seen strong volume growth of branded gluten-free ready-to-eat breakfast cereal (+5.7%) against a declining overall ready-to-eat cereal category (-2.5%)<sup>24</sup>.”

Carmen Ferguson, brand manager at Windmill Organics, points out that free-from should not imply foods that are lacking. “Regardless of allergies, intolerances, dietary preferences, flavour should always be at the heart of what we eat and ‘free-from’ food should be no different,” she says. “Very often, free-from foods use traditional ingredients, simply processing out the gluten. Instead, we use ingredients that are naturally gluten-free and combine them in recipes to create satisfying, exciting food.”

### Flavour and ingredient trends

Cauldron Foods’ Grogut points to Mediterranean, Korean and Thai



flavours remaining popular across the market “as consumers continue to look for sweet, spicy, smoky and herbaceous profiles”. “But we are also seeing some new and emerging trends which we expect to continue growing in popularity this year,” she adds. “Distinctive tastes such as fermented and charred flavours are coming out on top, alongside classics like sweet & savoury and caramelised.”

She also notes a huge surge in popularity for Moroccan flavours, with the delicate mix of sweet and spicy, such as apricot and chilli, proving “a huge pull for shoppers”.

**“Distinctive tastes such as fermented and charred flavours are coming out on top, alongside classics like sweet & savoury”**

Consumer palates are developing a growing taste for south-east Asian flavours, says Windmill Organics’ Ferguson. “Last year, south-east Asian cooking sauces surged in both value (+28.4%) and volume (+11.9%)<sup>25</sup> to cement themselves as the current fastest-growing cooking sauce type. With this in mind, the company launched an organic and fully vegan Thai Red Curry Paste, with ingredients including chilli, garlic, ginger and lemongrass.

Consumers are increasingly searching for bold and experimental world food flavours to excite their senses, driven in part by globalisation, cultural curiosity and social media influence, says Gosh! Food’s Belmont. “Bidfood cites ‘flavours less travelled’ as a major trend for foodservice in 2025<sup>26</sup>. This is underpinned by research that 80% of people like trying new things<sup>27</sup>. Lumina identified multiple international cuisines as emerging





# Cost and on-shelf visibility hinder sales

Among the barriers to purchase, price remains one of the most pressing concerns, particularly for flexitarians, says The Compleat Food Group's Fordham.

"Cost is often a deciding factor, meaning that brands must implement smart promotional activities, such as multibuy deals and loyalty incentives to drive trial and encourage repeat purchases," he says.

Cost remains one of the biggest barriers to consumers adopting plant-based or free-from diets, agrees Glebe Farm Foods' Rayner. "With 55% of consumers impacted by the cost-of-living crisis<sup>v</sup>, shoppers are being more selective

with their purchases, making it essential for brands to clearly communicate value beyond price – whether that's through health benefits, sustainability credentials or local provenance," he says.

At the same time, functional health is playing a growing role in food choices, with 64% of consumers regularly prioritising a well-balanced diet<sup>vi</sup>, he adds. "This presents an opportunity for the free-from and plant-based sector to position itself as an essential part of a nutritious, everyday lifestyle rather than an 'alternative' choice.

VFG's Lapsley believes shrinking

product space has led to limited visibility on shelves and the price differential between plant-based alternatives and traditional meat, especially amid the cost-of-living crisis... are key barriers to adoption. "Our key messages focus on the health benefits of plant-based products, such as being high in protein and fibre, but low in saturated fat," she says.

In free-from, choice (or lack thereof) is the biggest barrier for customers, says Kirsty's Henshaw. "They may go into a shop and have one or two products available to them, which they have to purchase week in, week out," she says.

"They want more choice and will take their entire basket elsewhere if this is not available to them. A basket with Kirsty's products in is double to a basket without, as 47.3% of free-from shoppers buy a free-from meal for themselves and non-free-from for other members of their household<sup>vii</sup>."

Primarily, free-from consumers don't want to feel excluded and they want choice and variety, says Nairn's Butterworth. He cites a more limited range and not enough choice, with variance by retailer, as well as the fixture being difficult to shop as factors proving a barrier to free-from sales development.

trends – West African, Filipino and authentic Mexican to name a few<sup>28</sup>.

"In comparison to the foodservice industry which has seen a spike in world flavours, in the plant-based and free-from grocery fixtures the current offering often falls short of delivering the level of excitement shoppers are seeking," he adds.

This year, Gosh! is expanding distribution of its street food range, introducing Aloo Tikki bites and Katsu Curry flavours, inspired by Indian and Japanese flavours, he reveals.

When it comes to free-from, global flavours are trending, says Kirsty's Henshaw. In January, the company launched a range of free-from Myprotein lunch pots in Sainsbury's, Morrisons and Co-op, which have globally inspired flavours, including Japanese Curry, Chipotle Beef and Firecracker Chicken. "This range appeals to a younger 18- to 44-year-old shopper," she says.

Fermented foods continue to gain traction with consumers, with 40% actively seeking live-cultured products that aid gut health<sup>29</sup>, notes The Compleat Food Group's Fordham. He highlights its pickles and ferments brand Vadasz, which he says saw 44% growth in the past 52 weeks<sup>30</sup>. Vadasz "has mastered two complex techniques – cold brining and lacto-fermentation" – allowing it to bring innovation to existing categories such as fresh sauces and drinks, he notes. "Most recently, it launched the market's first 'Kimchi Shot', catering to the rising demand for kimchi and fermented products in a convenient on-the-go format."

In the free-from market, meanwhile, classic flavours like chocolate and vanilla are continuing to trend, says Dr. Schär's Lockett. "We have seen growth in gluten-free products featuring these popular flavours, leading to a 7% increase in the category with our latest launches," he says.

## Purchase drivers: taste and texture

When asked what drives purchasing decisions, taste consistently ranks as the No.1 priority<sup>31</sup>, highlighting the need for brands to balance health-conscious ingredients with a flavour profile that keeps consumers coming back, says Glebe Farm Foods' Rayner. The fact that one in five coffee shop and café consumers choose an oat drink in their hot beverages<sup>32</sup> "reflects a shift where plant-based options are no longer just dietary substitutes but preferred choices, based on taste, texture and quality", he adds.

"Convenience, taste perceptions and cost are among the most prevalent barriers when it comes to eating less meat and more plants," says Cauldron Foods' Grogut. "Our innovation team is passionate about creating options that deliver on amazing taste, great value and simplicity. Our marinated Tofu Pieces are the top-selling tofu pieces in the category<sup>33</sup>, appealing to shoppers



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looking for quick and easy dinner solutions that don't cost the earth."

Taste and texture are consistently cited as the top barriers to purchase when it comes to meat alternatives, especially for flexitarians, who are engaging more with a plant-based diet, says VFG's Lapsley. "These factors are vital for encouraging repeat purchases and driving long-term category growth," she notes.

"In the past, free-from foods often suffered from poor taste or texture perceptions compared to their conventional counterparts, and a feeling that also applied to some vegan foods," says Gosh! Food's Belmont. "The category needs to continue to redefine how people see it by leading with taste, which is the No.1 driver of food purchase decisions<sup>34</sup>. Market trends are moving in its favour, including interest in holistic health, the notion of food as medicine, gut health and greater fibre intake. This gives it an opportunity to be normalised even further and appeal to mainstream shoppers. There is an onus on brands in the segment to lead with positive vs negative health messaging and deliver on taste."

With 71% of shoppers telling Bel UK they want plant-based products to mimic the taste and texture of dairy cheese<sup>35</sup>, the company is aiming to address this with its new recipes, it says. With its new Boursin Plant Based brand, Bel UK worked to ensure the flavour and texture – and even the packaging – align with all the key drivers its shoppers expect from the dairy version of Boursin. "And consumers tell us it tastes 'authentic, just like cheese'<sup>36</sup>," it notes.

Shoppers' desire for plant-based products that are more like dairy cheese was also the inspiration behind Bel UK's three-year R&D mission to perfect the melt and flavour of its Nurishh Plant-Based Shreds Cheddar Flavour and Nurishh Slices Cheddar Flavour, adds the company, with nutrition a key factor in their development.

As for free-from shoppers, quality is still extremely important, says Warburtons' Hook. "It's critically important that retailers ensure they provide a range of products that deliver on taste and enjoyment without compromise on elements such as quality ingredients and positive nutrition, from vitamins and minerals



through to fibre and protein," he says.

Freee's Marriage maintains taste is the most important driver in choosing any food brand. Its approach to production – in dedicated gluten-free facilities with natural gluten-free plant-based ingredients – ensures it makes good-quality, great-tasting foods without the need for anything artificial, she says. "This makes them ideal for those looking to make healthier food choices and avoid buying UPFs."

In free-from, trust is the No.1 driver in the category, closely followed by taste<sup>37</sup>, says Nairn's Butterworth. Product quality has improved

significantly over the last few years and so have consumer expectations, he says. "Gluten-free consumers are scrutinising labels from a safety point of view, but also looking for brands that are clean-label. Consumers are looking for products that are better for you; we see a shift from putting less bad stuff in (fat, calories salt etc) to consumers wanting to put more good in with the foods they eat (oats, wholegrain etc)."

He also highlights a huge variation in product quality and taste, as well as a perception that free-from products are less healthy, as barriers contributing to their adoption. "At Nairn's we are completely focused on our products tasting great... they just happen to be gluten-free," he says.


### The social/in-store mix

"Incredibly influential" is how Cauldron Foods' Grogut describes social media. "It has become an important tool in driving awareness

**“It's critically important that retailers ensure they provide a range of products that deliver on taste and enjoyment”**



# Shifting perceptions and opportunities



Gosh! Food's Belmont highlights a "huge opportunity" in retailers evolving their food-to-go offer, ensuring there are more healthy alternatives to traditional snacks, catering to growing consumer demand for nutritious, on-the-go options. As more businesses return to the office<sup>viii</sup>, sales of food-to-go items have returned to pre-Covid levels<sup>ix</sup> and have been showing growth, with new, more interesting sub-segments emerging, he notes. So, from May, the company will be introducing new products that "reframe on-the-go snacking, making it easier for shoppers to identify ingredients".

"On top of this, convenience is a big barrier for plant-based," he says. "Only 18% of people find meat substitutes easy to prepare<sup>x</sup>, so there is a huge education opportunity for brands and retailers to showcase... how easy it is to prepare meals using plant-based foods."

The Compleat Food Group's Fordham points to plant-based products "missing out on key eating occasions, with consumers struggling to find suitable options that fit seamlessly into their daily routines". Uncertainty around how to cook and prepare plant-based foods also discourages trial

and repeat purchase, he notes. Also, consumers often view plant-based products as 'alternatives' rather than desirable choices in their own right, he adds. "When products are positioned solely as substitutes, they risk being compared rather than appreciated for their own qualities."

Shifting perceptions to view plant-based options as mainstream is critical for sustained growth, agrees VFG's Lapsley. "By focusing on taste, convenience and affordability, alongside nutritional and environmental benefits, we can position these products as viable choices for all consumers – not just those committed to a

strictly plant-based lifestyle," she says. "Making plant-based products versatile and easy to incorporate into familiar recipes, such as Bolognese or chilli, helps reinforce the idea that they are practical everyday essentials."

In terms of meal occasions, growing sales of gluten-free flour indicate there is clearly a demand for home baking within the free-from community, says Freee's Marriage. "Understanding how to use and cook with gluten-free ingredients can be a new concept for many, but once the basic skills are mastered, there are hundreds of exciting recipes for consumers to try."

and consumer engagement over the last few years," she says. "Reaching shoppers directly with irresistible recipe inspiration and exciting new product news is a key part of our ongoing strategy to drive brand and category awareness. This year, we are really focusing on driving even more disruption on the path to purchase with unmissable in-store merchandising and displays," she adds.

However, The Compleat Food Group's Fordham advocates an integrated approach between social media and in-store merchandising, which he says is crucial for plant-based brands looking to drive both recognition and sales. "Familiarity breeds confidence, making consumers more likely to pick up a product they've already engaged with digitally," he points out. "Social media serves as the first touchpoint, shaping brand identity, building trust and creating excitement long before a consumer steps into a supermarket.

Through digital storytelling, influence partnerships and targeted advertising, brands can establish a distinct personality that makes their products instantly recognisable on the shelf. When done effectively, this online presence translates to in-store success. Impactful in-store experiences, from eye-catching POS displays to sampling opportunities, then reinforce that digital connection, turning online interest into repeat purchases."

At Dr. Schär, Lockett agrees that social media working in tandem with in-store merchandising is key. "Social media plays a vital role by engaging the community around new launches and updates. However, by enhancing the presentation of the free-from fixture and bringing it to the forefront of the store, retailers can significantly increase its appeal," he says. "Success stories have demonstrated that top retailers who make future-focused decisions on category placement tend to

experience growth ahead of the market. This highlights the critical importance of strategic in-store improvements in boosting brand recognition and driving the free-from food market forward."

Tiba Tempeh's Longton and Windmill Organics' Ferguson agree that social media plays "a crucial role" in driving the adoption of plant-based and free-from foods respectively. According to Longton, "it offers an immediate, accessible and cost-effective way to connect with our younger target audience who over-index in the meat-free category. It also enables us to efficiently target our more foodie and health-conscious consumers. For challenger brands, social media provides a platform for creativity and disruption, enabling them to stand out and capture consumer attention."

Meanwhile, Windmill Organics' Ferguson reveals that research<sup>38</sup> shows 26% of organic shoppers look to Facebook for product discovery,



## Analysis

followed by 23% on Instagram and 15% on TikTok. “Working with content creators to showcase easy and novel ways to use products is a proven strategy for engagement and conversion,” she says. “By leveraging trending topics, user-generated content (UGC) and influencer partnerships, brands can strengthen their digital presence and drive consumer adoption.”

“With 66% of plant-based shoppers saying they use social media<sup>39</sup>, plant-based brands would be foolish to under-invest in it,” says Gosh! Food’s Belmont. “As Instagram and TikTok algorithms favour UGC, many food and drink brands have capitalised on this by focusing – often solely – on realistic ‘at-home’ foodie content to bring to life ease of use and deliciousness of their products. With taste being the No.1 consideration factor for plant-based brands<sup>40</sup>, social media is a great tool to excite the senses through ASMR (autonomous sensory meridian response) cooking sounds like chopping, VO to talk through the recipe and bring flavours to life, bright lighting to showcase the freshness of products and ingredients, and aesthetic colourful plating to stimulate hunger,” he says.

“Massively important” is how Kirsty’s Henshaw describes social media, noting that there is a big free-from community who are reviewing and recommending products and letting others know about safe free-from finds. “A good example of this is what ‘may contain’ really means on packaging,” she says. “While manufacturers will go to great lengths to ensure cross-contamination risk is minimal, it still does occur and is almost impossible to avoid sometimes – hence having to include ‘may contain’ messaging on products.

“We connect with our loyal customers on social media and often send out products to our followers so that they can share their love of our brand with other free-from followers. For instance, our Flourish meals for children aged two to five have been praised for their taste and the number of veggies included within them – a point of difference to many children’s ready meals.”

For Warburtons, social media plays a pivotal role in connecting with the company’s gluten-free consumers, with platforms like TikTok serving as



essential channels for meal inspiration, says Hook. “This is especially valuable for those following a free-from lifestyle, as they often seek additional guidance and creative meal ideas,” he says.

Social media also offers a powerful platform to reinforce Warburtons’ brand identity, share inspiring recipe content and raise awareness of its diverse product range, he adds. “We also collaborate with influencers who resonate with the gluten-free community to help amplify our message and create engaging, fun content in a category that has traditionally focused more on functionality.”

**“Working with social media content creators to showcase novel ways to use products is a proven strategy for engagement”**

Social media continues to grow relevance for those brands that operate in free-from, specifically UGC and the role of influencers, says Nairn’s Butterworth. Trust remains the No.1 category driver<sup>41</sup>, so consumers still look to brands as a trusted source of information, with safety being the primary concern when trying something new.”

### Building success for the future

So what opportunities and formats will bring future success in the plant-based and free-from sectors?

Within the plant-based category, ready-to-eat meat alternatives have performed well at retail in formats such as slices and pieces, says The Compleat Food Group’s Fordham. “This is because they mirror recognisable formats, so can seamlessly integrate into existing eating habits,” he notes. As an example, he points to its brand Squeaky Bean positioning products around specific occasions – whether



that is adding slices to sandwiches, tossing pieces into a salad or eating straight from the packet in a 'fridge to face' moment. "These spontaneous snacking opportunities tap into the way people actually eat, making plant-based choices feel natural," he says.

"The key lesson here is that familiarity and convenience are essential for driving adoption. Consumers are far more likely to embrace meat alternatives when they don't have to rethink their entire meal prep routine. By offering products in formats that require minimal effort – no complicated cooking, no extra planning – brands can convert sceptical shoppers into loyal customers and encourage repeat purchases. The more effortless the swap, the greater the success."

With consumers demanding more real, wholefood options, rather than heavily processed imitations packed with artificial ingredients, tofu and tempeh have emerged as two of the most successful sectors in the meat

alternatives category, driven by their natural, nutrient-rich profiles, says Tiba Tempeh's Longton. He notes that tempeh is an established product, being one of the world's most naturally nutritious plant-based proteins, and authentically a staple of Indonesian cuisine for over 400 years.

Gosh! Food's Belmont says that, in recent years, several sectors within the plant-based and speciality food markets have demonstrated significant success at retail level, and agrees that a prime example is tofu, particularly within the block category, which he says has shown impressive growth. "This is due to its naturalness and versatility, making it a convenient and healthy option, as well as tapping into different global flavours. Multiple research studies show the increased shopper appeal for international flavours, and Gosh! caters to this by bringing dynamic and colourful stand-out products to shelves, in addition to bridging the gap from main meal inspiration to healthy snacking.

"Growing consumer trends and values such as sustainability, health, minimal processing, and authenticity signals the importance of offering products that align with these values," he notes. "Falafel and tofu share this same approach, and as falafel is made from simple, wholesome ingredients like chickpeas, vegetables, herbs, and spices, we know promoting clean-label attributes attract consumers seeking natural alternatives to processed food."

Warburtons' Hook says it is hard to ignore the success of the dairy alternatives category, "which 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. The ambition of our free-from bakery range has always been to ensure that we are continuously innovating, enabling us to give consumers access to a range of quality free-from products," he adds.

Successful products in the free-from sector have included ready meals, pizzas and desserts, says Kirsty's Henshaw. "Free-from shoppers want to be included and not have to compromise on taste and quality while knowing that these convenient foods are safe for them to eat," she says.

One area where Windmill Organics

has seen particular growth is in bakery products, reveals Ferguson. Between 2023 and 2024, sales of its brand Biona's breads grew 183%, she notes. "This is because Biona's bakery range offers simple, organic, minimally processed bread alternatives that are free from wheat and still deliver on taste and texture," she says. "Because many consumers are increasingly concerned about certain bakery products and the potential impact on their health, they are looking to either reduce their consumption of bread altogether or at least seek out alternative bakery products with benefits, which must deliver on both health and taste."

The most successful gluten-free products succeed by offering excitement, interest and excellent product quality to consumers, sums up Dr. Schär's Lockett: "By staying ahead of trends, delivering innovative products, and ensuring consistent quality, brands can drive success at retail level and capture the interest of both consumers and retailers."

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# Purposeful plant-based drive

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GoGo squeezeZ®)

## KEY BRANDS

**Babybel®**  
**Boursin®**  
**Port Salut®**  
**The Laughing Cow®**  
**Nurishh®**  
**GoGo squeezeZ®**

 Bel UK is on a purposeful mission to diversify its brand portfolio to offer healthier, more sustainable food that protects the planet's resources while meeting the needs of a growing global population<sup>1</sup>, says the company.

Game-changing R&D, product innovations and reformulations helped add £2.5m in sales to the category in 2024<sup>2</sup> by satisfying increased demand from shoppers eating fewer animal products<sup>3</sup> while doubling their consumption of plant-based alternatives. Significantly, Bel's plant-based NPD also satisfies the expectations of the 71% of shoppers who want products that mimic the taste and texture of real cheese<sup>4</sup>, it notes.

### The best yet: a new Boursin

“Wave goodbye to bland and boring plant-based alternatives to cheese. Boursin has ‘cracked’ it with new Boursin Plant-Based – a fragrant fusion of garlic, parsley, and chives,” adds Bel UK. “New flavour and format innovation launched in time for Christmas 2024, prompting consumers<sup>5</sup> to say it tasted ‘authentic, just like cheese’ – making it a perfect addition to grazing boards or as an ingredient in creamy pasta. But don’t take our word for it. Culinary duo, Henry and Ian from Bosh!, whose plant-based recipe books have sold more than one million copies worldwide, couldn’t have been more complimentary, saying: ‘We loved Boursin before going plant-based, and tasting the new plant-based version felt like coming home’.”

In fact, Boursin Plant-Based’s creamy taste and texture drove volume growth of 44%<sup>6</sup> in the final four weeks of 2024, it reveals. And latest data shows it’s Sainsbury’s 8th-biggest plant-based alternative to cheese and No.1 in indulgence<sup>7</sup>. Boursin Plant-Based also arrived in Waitrose in March.

### Nourishing changing tastes

Nurishh, Bel UK’s 100% plant-based brand, offers versatile products to ease shopper transition into choosing more plant-based products, adds Bel UK.

“Nurishh Shreds Cheddar Flavour



**“Wave goodbye to bland and boring plant-based alternatives to cheese. Boursin has ‘cracked’ it with new Boursin Plant-Based”**

and Nurishh Slices Cheddar Flavour are the result of a three-year mission to perfect their melt, flavour, and texture, making them perfect for sandwiches, baked potatoes and on pasta,” it says. “The launch followed a complete brand makeover, including a new packaging design, branding and recipes.” Other products in the Nurishh range include plant-based Greek Style Cubes, Alternative Camembert Flavour, Grated Gran Vegiano and Spreads.

### Plant-based favourites

Bel UK’s plant-based portfolio also extends to its iconic brands – Babybel and The Laughing Cow, ensuring there’s plant-based brand for every occasion.

Mini Babybel Plant-Based, a fun, dairy-free alternative to the UK’s No.1 cheese snack<sup>8</sup>, is perfect for on-the-go. With a smooth texture and creamy taste, it is also a source of calcium and B12. It comes in a green wax, and its paper pouch can be recycled at home.

Launched in 2023, Laughing Cow Plant-Based is the first UK alternative to cheese spread portions. Its new, improved recipe is made with almonds to create a smooth, spreadable texture. At 36 calories per triangle, it’s also a source of calcium and Vitamin B12<sup>9</sup>. The individually wrapped portions maintain their freshness for longer and complement anything from flatbread to crackers, avocados and celery.



## Source

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<sup>9</sup> Vitamin B12, as part of a healthy, varied and balanced diet, contributes to the normal function of the immune system



# GROW YOUR CATEGORY WITH ICONIC PLANT BASED BRANDS



#1 SNACKING  
ALTERNATIVE<sup>1</sup>



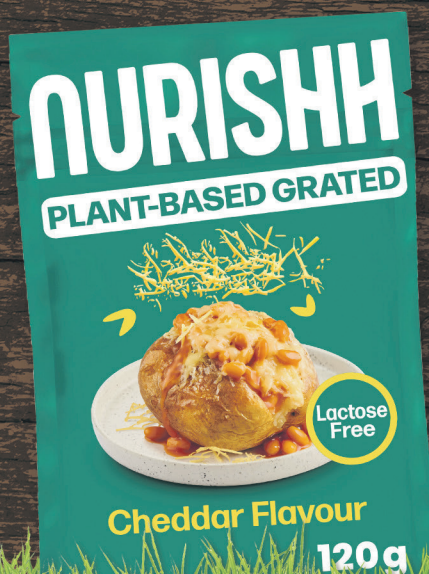
#1 PORTION  
SPREAD  
ALTERNATIVE<sup>1</sup>



#1  
INDULGENCE  
ALTERNATIVE<sup>1</sup>



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- Superior taste vs competitors<sup>2</sup>
- High meltability & smooth texture
- Well-loved in many recipes



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# Unlocking the power of plant-based

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### KEY BRANDS

#### Cauldron™

##### Vegan

- Tofu Pieces
- Extra Firm Tofu
- Authentic Tofu
- Marinated Tofu Pieces
- Hoisin Tofu Pieces
- Middle Eastern Falafels
- Moroccan Falafels

##### Vegetarian

- Cumberland Sausages
- Lincolnshire Sausages
- Butternut & Red
- Chilli Bites

#### Source

<sup>1&2</sup> NIQ, Total Plant Based  
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22.02.25

Backed by its goal to capture the imagination of plant-curious shoppers, Cauldron Foods is adding colour and excitement to the fixture, with its flavour-packed range of delicious snacks, tofu and sausages, reveals Lucy Grogut, head of brands.

As the No. 1 SKU<sup>1</sup>, Cauldron's Middle Eastern Falafel has the highest penetration in plant-based snacking<sup>2</sup>. Its Moroccan Falafels are equally well loved by consumers, leading to a 40% increase in distribution over the last year, she reveals.

“There’s a huge opportunity for plant-based category growth,” says Grogut. “Shoppers are looking for new and different ways of getting more plants into their diets, and Cauldron’s range, full of vibrant and nutritious ingredients, sets taste buds alight, showing that plants are far from boring. Our intensely moreish flavour combos are a great source of protein, high in fibre and low in saturated fats.



“Cauldron’s range, full of vibrant and nutritious ingredients, sets taste buds alight”

“This year we’ll bring even more delicious plant-powered snacking options to the chiller. These entice meat eaters and flexitarians into the category, driving penetration and frequency, as those who taste them keep coming back.

“Also, with some of our biggest-ever campaigns coming to life in the aisles of all major retailers, Cauldron will be unmissable, driving incremental sales.”

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# Crafting excellence in gluten-free

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## KEY BRANDS

Balance of Both Loaf  
Brioche Burger Buns  
Foldable Flatbreads  
Wholesome Loaves  
Ciabatta Rolls

“As the gluten-free category continues to outpace mainstream growth at a steady 4%<sup>1</sup> increase year-on-year, Schär is shining as a market leader here in the UK and globally, providing high-quality gluten-free products,” says Declan Lockett, MD UK & Ireland. “Our dedicated Glasgow bakery team push boundaries constantly, introducing exclusive new offerings that cater to the evolving needs of our loyal retail and foodservice customers. Following substantial investment in the Glasgow bakery we acquired in 2022, we continue to launch more premium gluten-free products that set us apart in the market.

“Our pursuit of taste perfection, texture excellence, and cleaner labels continue to resonate with consumers’ demands,” he notes. “We avoid artificial preservatives and embrace traditional bread-making techniques, crafted with care. This dedication ensures every product meets the highest standards and exceeds consumer expectations.



“We embrace traditional bread-making techniques, crafted with care”

“Our innovation journey has led us to deliver quality, award-winning gluten-free products like the Balance of Both Loaf and Brioche Burger Bun. And our upcoming ‘Best Taste Guarantee’ ATL campaign illustrates the confidence we have in our best-tasting breads, and our commitment to exceptional quality and customer satisfaction. In 2025 and beyond, we’ll continue to set the gold standard for gluten-free excellence.”

Source

<sup>1</sup> Circana 52/12 w/e 15.03.25

# made with the best of craft bakers.

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BAKED IN THE UK  
475g e

**BRIOCHE BURGER BUNS**  
SOFT AND FLUFFY  
BAKED IN THE UK  
160g e

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**OR YOUR MONEY BACK**



# Pure plant satisfaction

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**Lydia Brook**  
Brand Manager  
**Paul Zalecki**  
Head of NPD

## KEY BRANDS

**Creamy Mushroom Wholemeal Pie** (£3.85, 235g)  
**Creamy Mushroom Gluten Free Pie** (£3.80, 235g)  
**Saag Aloo Gluten Free Pie** (£3.80, 235g)  
**Tomato & Olive Gluten Free Tart** (£3.60, 150g)  
**Tomato & Olive Shortcrust Tart** (£3.50, 150g)  
**Ultimate Nut Roast** (£5.95, 280g)  
**Ultimate Sharing Nut Roast** (£11.75, 600g)  
**6 Sausage Rolls with Red Onion Chutney** (£3.30, 160g)  
**Cheesy Broccoli Shortcrust Quiche** (£4.70, 380g)

Clive's Purely Plants has been producing 100% plant-based pies and pastries since 1986. Now, the brand – which is part of The Vegan Food Group portfolio – is entering an exciting new chapter with revitalised recipes, a refreshed brand look, and a clear focus on taste and quality through the power of plants.

The commitment to being entirely plant-based remains as strong as ever, with Clive's new positioning building on that foundation to go beyond dietary needs, focusing on centre plates for everyone to enjoy. With vegetables, beans, pulses, and grains at the heart of every product, Clive's is on a mission to deliver 'Pure Plant Satisfaction', explains Abigail Nelson-Ehoff, head of marketing for Vegan Food Group UK. "We've been satisfying hearts, minds and bellies for nearly 40 years, cooking up purely plant-based foods packed with nature's finest ingredients, and a whole lot of love," she says. "This is feel-good grub, packed with plants, full of flavour and made with care."

## Upgrading production and recipes

To support this next phase, Clive's has invested in its Dartmouth bakery – upgrading equipment, enhancing production processes, and expanding freezer and chiller capacity to meet growing demand and deliver greater consistency across the range.

On the plate, recipe development has centred on improving taste, texture and ingredient quality. The Mushroom Wholemeal Pie is now packed with five types of mushrooms for extra depth and a rich, satisfying bite. Across the range,



**“We’ve been satisfying hearts, minds and bellies for nearly 40 years, cooking up purely plant-based foods packed with nature’s finest ingredients and a whole lot of love”**

an industry-first mung bean glaze gives the pastry a delicious golden finish.

Clive's refreshed packaging celebrates the possibilities of plants, with vibrant colours and a playful visual language designed to boost shelf standout and dial up appetite appeal. "The unapologetic creative leads with flavour, helping shoppers quickly connect with the delicious plant-packed recipes on offer," says Nelson-Ehoff.

As part of the update, the brand will also introduce a new front-of-pack callout highlighting plant variety – a category-first for a pastry-led brand, and a direct response to research showing that 70% of shoppers say eating 30 plant varieties a week is important to them<sup>1</sup>.

To support all of the brand's advancements, Clive's Purely Plants will launch its biggest-ever brand campaign in mid-May. This will include the brand's first-ever TV advert, alongside print, digital and in-store media, reaching 15 million potential shoppers.

Nearly 40 years since the first Clive's pie was baked, the brand remains as committed as ever to showcasing the delicious potential of plants. Its mission is clear: to make flavour-packed, plant-based food that brings joy to everyone at the table.



## Source

<sup>1</sup> Vypr Research, February 2025

Clive's  
PURELY PLANTS

MUSHROOMS



NEW PERFECTED RECIPES  
NEW INNOVATIVE PASTRY GLAZE  
NEW STAND-OUT PACKAGING



BIGGEST EVER BRAND CAMPAIGN  
REACHING OVER 15M SHOPPERS  
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# Broadening the appeal of free from

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## 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

Freee has been filling kitchen cupboards across the country with its naturally gluten-free flours and foods for more than 40 years. Supporting gluten-free living at every mealtime, Freee has become a beacon brand in the free-from aisles, offering a wide range of home baking essentials, breakfast cereals, pastas, snacks and is home to the No.1 gluten-free flour range in the UK<sup>1</sup>.

“As a family-owned UK-based brand, we have a wholesome mission at heart; to make gluten-free living deliciously simple,” says CEO and founder Clare Marriage. “Freee’s foods are made with only the finest, plant-based ingredients without any of the top 14 allergens, and can be enjoyed by anyone, whether living gluten free or not.”

### Attention on a younger audience

With a focus on making everyday foods taste great, Freee’s ready-to-eat snacks have proven to be a key driver in the brand’s growth over the past 12 months. Sales of its organic oat bars have increased by 76.8% vs last year<sup>2</sup>, as a growing number of consumers look for healthier, free-from options. This year Freee will expand upon the success of its oat bar range and focus its attention towards younger consumers with the launch of two brand new Kids Oaty Bars. Soon to be available on Ocado, the 25g Chocolate Chip and Apple & Sultana varieties are free from the top 14 allergens – making them an ideal choice for school



“As a family-owned, UK-based brand, we have a wholesome mission at heart; to make gluten-free living deliciously simple. Freee’s foods are made with the finest plant-based ingredients and can be enjoyed by anyone, whether living gluten free or not”

lunchboxes where allergy awareness is becoming increasingly important.

Freee’s breakfast cereals have also seen a strong performance with sales rising by +15.5% in volume over the last six months<sup>2</sup>. This uplift has largely been driven by the successful launch of new Cinnamon Hoops – which launched in Sainsbury’s, Tesco and Ocado last year – and wider distribution of its popular Fruit & Fibre and Chocolate Stars varieties, reveals Marriage. Freee now has a range of seven breakfast cereals all made in its own dedicated cereal plant.

### Relaunching pasta

This year, Freee will also stage a significant relaunch of its pasta range. Now manufactured in-house in a dedicated gluten-free facility in Italy, its existing organic pasta range will have a new pack format and updated pack design, accompanied by the introduction of a non-organic range and new Elbow Macaroni varieties. By offering both organic and non-organic, Freee hopes to appeal to a wider group of gluten-free consumers looking to tuck into hearty pasta dishes.

Finally, within its heartland of home-baking Freee has continued to see success across its gluten-free flours. To assist those looking to cook and bake gluten-free, Marriage develops recipes that are available to Freee’s growing community on the freee-foods.co.uk website or her gluten-free cookbook. “From traditional cakes and breads to pastry and pasta dishes, we try to offer easy, everyday meals that everyone from novice bakers to experienced cooks can follow,” she says.

## Source

<sup>1+2</sup> NIQ, GB\_Groc Multis, 52 w/e 22.03.25

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# Goodbye gluten, hello delicious!



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# Tap into the goodness of oats

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## KEY BRANDS

**PureOaty**  
**Three Robins**

The UK free-from and plant-based sectors continue to thrive, with the market now worth £3.85bn and up 2.4% in the past year alone<sup>1</sup>. With an estimated 2.9m UK consumers actively following a gluten-free diet<sup>2</sup>, demand for high-quality, great-tasting free-from products has never been higher. “At Glebe Farm Foods, we believe dietary preferences should never mean compromising on taste, and our PureOaty range delivers just that – delicious, award-winning products that are sustainably produced and allergen-free,” says MD Philip Rayner.

### Food manufacture for the future

Sustainability starts at the source, and Glebe Farm Foods is committed to responsible farming and manufacture, notes Rayner. “We work closely with British farmers, sourcing oats from within 70 miles of our Cambridgeshire farm. As part of our sustainable approach, we implement dual cropping to support soil health and biodiversity, while waste water from our production site is filtered through reed beds before being used to irrigate our fields.

“All production then takes place within just 150 metres, guaranteeing exceptional product quality and a drastic reduction in food miles. Our entire process runs on renewable energy, with our three biomass boilers powered by oat milling by-products.”

Glebe Farm’s oat drink, granolas and porridge retail packs have the lowest reported carbon footprints on the market – just 0.18kg CO<sub>2</sub>e per pack of porridge and 0.28kg CO<sub>2</sub>e per pack of granola, compared to industry averages of 0.67kg and 1.13kg, respectively<sup>3</sup>, he says. “So, switching to PureOaty significantly reduces GHG emissions,



“At Glebe Farm Foods, we believe dietary preferences should never mean compromising on taste and our PureOaty range delivers just that – delicious, award-winning products that are sustainably produced and allergen-free”

making it a win for retailers, shoppers and the planet – especially as many businesses strive for net zero by 2030.”

### Oats for all with Three Robins

“Providing the best oat-based products extends beyond PureOaty,” reveals Rayner. “In 2025, we are embarking on an exciting joint venture with Three Robins, a brand dedicated to family-friendly, fortified oat drinks. Its range includes a family barista, professional barista and a refreshing chocolate milk, all made from premium Scottish oats and providing a healthy, delicious option for children and adults alike.

“Three Robins uses gluten-free oats with no added sugar and focuses on clean-label ingredients. Its product range is already available in Scotmid Co-op and on Amazon, with exciting new listings in the pipeline.”

### An oat-standing partner

With 56% of consumers actively seeking British produce<sup>4</sup> and 64% prioritising nutritious, balanced diets<sup>5</sup>, retailers need partners who can deliver on both sustainability and quality, he adds. “At our Tetra Pak facility, we produce 10,000 litres of oat drink per hour, offering an efficient solution for customers. By stocking PureOaty and Three Robins, retailers can offer authentically British, low-carbon, and high-quality oat-based options; from creamy oat drinks for coffee to delicious and healthier drinks for kids.”



## Source

- <sup>1</sup> Kantar, FMCG Panel, MAT to April 2024 vs Previous
- <sup>2</sup> Coeliac Society, 2024
- <sup>3</sup> As calculated by MyEmissions
- <sup>4</sup> AHDB Qual Research, Oct 2024
- <sup>5</sup> YouGov, Pulse survey, Jan 2025



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\* As calculated by My Emissions.  
\*\* PureOaty is certified by Coeliac UK  
to carry the Crossed Grain trademark.



# Naturally innovative foods

## DETAILS

**Gosh! Food**  
1 Europa Business Park  
Maidstone Rd  
Kingston  
Milton Keynes MK10 0BD  
t: 01908 641274

## KEY CONTACTS

**Mark Chance**  
Commercial Director  
**Caroline Hughes**  
Marketing Director

## KEY PRODUCTS

Moroccan Spiced Falafel  
Mediterranean Falafel  
Beetroot Falafel  
Sweet Potato Pakora  
Spinach & Pine Nut Bites  
Veg Garden Burgers

➡ The plant-based food sector is undergoing a positive reset, becoming more dynamic, more audience-inclusive, driven by taste and natural ingredients over ultra-processed foods. Over the past year, Gosh! Food has seen strong growth that reflects the increasing consumer demand for healthier, more sustainable food choices, as marketing director Caroline Hughes explains: “Gosh! falafel has achieved double-digit growth at +32% YOY<sup>1</sup>, driving penetration by recruiting 160,000 new households into the brand last year.

“But what really excites us is the opportunity ahead as the market continues to evolve, with a category vision that is designed to break down old boundaries and prioritise shopper needs and demands,” she notes. “Our reassuringly natural positioning combines the key consumer growth drivers of better-for-you, great tasting, natural and sustainably produced foods that can be consumed at different moments in the day. By showcasing that plant-based food can be crafted from real, simple, ‘kitchen cupboard’ ingredients that are familiar and reassuring, with minimal processing, we are tackling concerns and building a deep consumer understanding.”

While the plant-based market has seen some challenges, such as overcoming taste and texture preferences, Gosh! has embraced these as opportunities for innovation, by putting taste and nourishment at the core of all it produces in its kitchen, adds Hughes. “In the past year, we have introduced exciting new products that cater to these evolving consumer needs, that are easy to integrate into



“What really excites us is the opportunity ahead as the market continues to evolve, with a category vision that is designed to break down old boundaries and prioritise shopper needs and demands”

everyday meals. We are excited to extend our brand proposition into the ‘food to go’ sector with some exciting launches coming this summer. We aim to reframe lunchtime snacking and champion what matters most to consumers: naturally healthy, great tasting and convenient products that don’t cost the earth.”

The Gosh! brand is not about compromise or accepting the status quo if things need to shift in the category, she says. “Big-picture changes are at play in consumers’ diets and lifestyle choices, and we need to reflect, respond to and deliver against these opportunities and challenges.

“Our marketing strategy is focused on making our products as accessible and visible as possible, bringing our values and personality clearly into play. Today’s shoppers want to feel confident in their choices, which is why we work hard to create informative and engaging content. Through social media campaigns, influencer partnerships, sustainability initiatives and in-store promotions, we’re able to reach our audience in new ways that both educate and entertain to reinforce our strong positioning.

“And, by championing real, recognisable ingredients and bold flavours with nothing to hide, we positively impact diets and continue to flourish as a brand.”



## Source

<sup>1</sup> Nielsen IQ RMS, Customised Chilled Meat Substitutes Database, Grocery Multiples, 52 w/e 22.03.25



# GOSH!

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**Kirsty's**

e: [hello@kirstys.co.uk](mailto:hello@kirstys.co.uk)  
w: [kirstys.co.uk](http://kirstys.co.uk)

# Inspiring ready meals for all occasions

## DETAILS

**Kirsty's**  
Springfield Farm  
Business Park  
Cold Cotes Road  
Harrogate HG3 2SG

## KEY CONTACTS

**Kirsty Henshaw**  
Managing Director  
**Katy Moss**  
Sales Director  
**Chloe Keir**  
Senior Marketing Manager

## KEY BRANDS

**Sweet & Sour Chicken**  
(Takeaway range)  
**Vegetable Lasagne**  
(Frozen range)  
**Mac & Cheese**  
(Frozen range)  
**Lentil Cottage Pie**  
(Everyday/Chilled)

## Source

<sup>1</sup> Nielsen, Kirsty's Frozen ready meals +9.7% vs Chilled Ready Meals, to w/e 07.09.24



“Over the last year, we’ve seen a considerable increase in the demand for free-from ready meals, influenced significantly by the cost-of-living crisis,” says Kirsty Henshaw, founder of Kirsty’s “For this reason, we’ve also seen real growth in the frozen category, with shoppers trading down from chilled ready meals to frozen<sup>1</sup>.”

“We need to ensure we’re tapping into what younger consumers are looking for from free from products as our ready meals currently appeal more to the older shopper. So, our research has been significant in understanding free from shoppers and their purchase motivations as part of our brand refresh – encompassing packaging, a new website and social strategy.”

Rather than launch new products, Kirsty’s is focused on being *the* free from brand for all occasions and really trusted by shoppers, she notes. “We want to ensure we can drive sales incrementally with insight-backed



“We want to ensure we can drive sales incrementally, with insight-backed opportunities”

opportunities; our takeaway product range is a good example, with Kirsty’s Sweet & Sour Chicken consistently one of our best-selling SKUs.

“We also work hard with retailers to give more prominence to free from within chilled ready meals, better signposting in-store, and including free from options in customer dine-in moments such as Easter & Christmas.”

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**Takeaway**  
options

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## Tiba Tempeh

e: sales@tibatempeh.com  
w: tibatempeh.com

# The fastest-growing meat-free brand

### DETAILS

**Tiba Tempeh Ltd**  
12 Fletcher Crescent  
Newcastle  
NE20 0FJ

### KEY CONTACTS

**Alexandra Longton**  
Co-Founder & Director  
**Ross Longton**  
Co-Founder & Director

### KEY BRANDS

**Tiba Tempeh**  
– Original Block  
– Original Block XL  
– Smoky Block  
– Sweet Chilli Pieces  
– Curry-Spiced Pieces  
– Soy-Marinated Pieces  
– Plant-Based Mince

### Source

- <sup>1</sup> NielsenIQ, Meat alternatives, GB total coverage, 52 w/e 22.02.25
- <sup>2</sup> Mintel UK meat substitutes market report 2024
- <sup>3</sup> Attest consumer research, March 2025

➡ Tiba Tempeh has emerged as the fastest-growing brand in the meat-free category, with a remarkable 736% surge in retail sales value over the past year. While the overall category has declined, Tiba Tempeh has bucked the trend, growing by an impressive £1.2m in retail sales and securing its position as the UK's largest tempeh-only brand<sup>1</sup>, reveals co-founder Ross Longton.

“The brand's rapid growth is fuelled by rising consumer demand for more natural and nutritious options,” he says. “While nearly 70% of consumers are concerned about highly processed meat substitutes<sup>2</sup>, Tiba Tempeh offers products made from 100% natural ingredients with minimal processing.

“Our products contain over 22g of protein per 100g, are high in fibre, gut-friendly, and provide one of your five-a-day. They are also organic, vegan and gluten-free, making Tiba Tempeh one of the world's most naturally nutritious plant-based proteins.”



“Tiba Tempeh is one of the world's most naturally nutritious plant-based proteins”

The brand is now available in major UK retailers such as Sainsbury's, Ocado, Morrisons and Waitrose.

Innovation also plays a crucial role in its success, with a new Smoky Block set to launch in April 2025. Longton adds: “As the most preferred tempeh brand in the UK<sup>3</sup>, Tiba Tempeh continues to lead, with great-tasting, naturally nutritious and sustainable plant-based food.”

BRITAIN'S  
FASTEST  
GROWING  
MEAT-FREE  
BRAND\*



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\*NielsenIQ, Meat alternatives, GB total coverage, 52 w/e 22.02.25



# Great taste and full of goodness

## DETAILS

**Nairn's Oatcakes Limited**  
90 Peffermill Rd  
Edinburgh EH16 5UU

## KEY CONTACTS

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

## KEY BRANDS

**Nairn's**  
– Oatcakes  
– Flatbreads  
– Wholegrain Crackers  
– Oat Biscuits  
– Oaties  
– Biscuit Breaks  
– Cereals  
– Snacks

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, we're constantly innovating to bring consumers the best in taste, texture, and variety," he notes. "From everyday snacks to special treats, our range is packed with flavour, offering something delicious and full of the goodness of 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."

"We pride ourselves on offering a range of products that taste amazing and just happen to be gluten-free. But don't just take our word for it as our products have won numerous Free From Food awards and Great Taste awards. We believe that snacks should taste great and be better for you as well. That is why all of our products are made from 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."

### Shift in consumer behaviour

Two in three consumers are trying to make healthier choices but without compromising on taste, they are actively looking for products that are better for them, adds Butterworth. "We have seen a shift in consumer snacking behaviour from putting less bad stuff in like fat, calories, salt etc, to consumers wanting to put more good in with the food they eat – whether that be wholegrain oats, natural ingredients or snacks that are just better for them," he says.

It has been another year of



**“From everyday snacks to special treats, our range is packed with flavour, offering something delicious and full of the goodness of wholegrain oats for every occasion”**

growth for Nairn's as the company grew its gluten-free value sales +9%, which is ahead of the total market (+6.6%)<sup>1</sup>. "The introduction of our Mini Cheese Bakes has been a real success, a great-tasting snack product that won Gold in the 2024 Free From awards," he reveals.

### Snacking NPD

"Innovation is key and we continue to be seen as the brand leader, bringing new products to the category. We test, trial and refine all of our new products in our dedicated state-of-the-art gluten-free factory," says Butterworth. "We've seen a big shift in how savoury biscuits are eaten, with consumers using them less for topping and more for snacking. Building on the success

of Mini Cheese Bakes, we will introduce another snacking style product, Snaks, in April.

"The gluten-free sweet biscuit category is in growth, (driven by Nairn's)<sup>2</sup> and we have identified incremental opportunities to develop the category further. In April, we are launching caramelised biscuit Moments – perfect for those sweet snacking occasions.

"Innovation also ensures our existing ranges are as good as they can be; we recently relaunched our Cracker Range with an improved taste and texture that consumers really like."



Source

<sup>1,2</sup> Nielsen, data to 22.02.25



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nairn's



# Defining plant-based's future

## DETAILS

**The Compleat Food Group**  
Tottle Bakery  
Dunsil Drive  
Queens Drive Industrial  
Estate  
Nottingham NG2 1LU

## KEY CONTACTS

**Yvonne Adam**  
Chief Marketing Officer  
**Rob Hoare**  
Chief Commercial Officer  
**Jason Fordham**  
Customer Insights Director

## KEY BRANDS

**Squeaky Bean**  
**Vadasz**  
**Wall's**  
**Pork Farms**  
**Wrights**  
**Unearthed**  
**Palace Culture**  
**The Real Yorkshire**  
**Pudding Co**

At The Compleat Food Group, we drive plant-based innovation by combining deep consumer insight with a commitment to superior taste, says chief marketing officer Yvonne Adam. “Our approach ensures we deliver first-to-market products that not only meet but exceed expectations on flavour and texture – key factors in revitalising a category that has seen an 8.9% decline over the past 52 weeks<sup>1</sup>,” she says.

“Our hero plant-based brand, Squeaky Bean, is at the forefront of this, growing 3.7% over the past year<sup>2</sup>. By pioneering exciting innovations, Squeaky Bean continues to attract both flexitarian and vegan consumers looking for high-quality, plant-based alternatives that dare to compare.”

With meat reduction the primary entry point into the category, Squeaky Bean's Crispy Bacon – the only ready-to-eat plant-based bacon on the market – delivers the satisfying crunch and smoky flavour of traditional bacon, setting a new standard for meat-free indulgence and craveability.”

Meanwhile, Squeaky Bean's plant-based Tuna Style Flakes have quickly gained traction in seafood alternatives, now accounting for a quarter of all meat-free seafood sales<sup>3</sup>. “Its delicate, flaky texture and high Omega-3 content offer a compelling alternative for consumers looking to elevate their lunchtime meals and salads,” she explains.

Squeaky Bean is also responding to growing consumer demand for cleaner labels, as 41% of plant-based shoppers now prioritise natural ingredients<sup>4</sup>. To meet this, the brand launched its Tofu Slices, tapping into the fast-growing tofu and tempeh subcategory, which has expanded by 10.3% this year<sup>5</sup>.

“Innovation is also driving success across our other leading brands,” adds Adam. “Reimagining British classics for the plant-based market, Wall's Pastry and Pork Farms ensure consumers don't have to compromise on familiar favourites. Wall's Pastry relaunched its No.1 Vegan Roll – a perfectly seasoned filling wrapped in



“Our approach ensures we deliver first-to-market products that not only meet but exceed expectations on flavour and texture”

crisp, golden pastry, while Pork Farms' Vegan Porkless Pie delivers the savoury indulgence of a traditional pork pie. The success of these products, up 33% in the last year<sup>6</sup>, proves that trusted heritage brands can lead the way in plant-based innovation.

“Meanwhile, responding to growing consumer interest in gut health, Vadasz has expanded its core range of pickles and kimchi, which effortlessly elevate everyday meals. Its innovative approach has gained recognition as The Grocer's Food Brand of the Year and cemented its position as the UK's leading chilled pickles and ferments brand<sup>7</sup>.

“By continuing to launch market-leading innovation that consumers love, we're not just keeping up with market trends – we're defining the future of plant-based food, strengthening our mission of creating food to feel good.”



## Source

- <sup>1</sup> Circana, w/e 25.01.25
- <sup>2</sup> Circana/Squeaky Bean, w/e 25.01.25
- <sup>3</sup> Circana, 12 w/e 25.01.25
- <sup>4</sup> Vypr/The Compleat Food Group, June 2024
- <sup>5</sup> Circana/Squeaky Bean, w/e 25.01.25
- <sup>6</sup> Circana, w/e 25.01.25
- <sup>7</sup> Circana/Kantar, Market data, 52 w/e 04.12.24



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Warburtons

e: warburtonsglutenfree.com/say-hello/  
w: warburtonsglutenfree.com

# It's gluten-free – honest!

## DETAILS

**Warburtons Gluten Free**  
Back o'th' Bank House  
Hereford Street  
Bolton  
Lancashire BL1 8HJ  
t: 0300 373 0200

## KEY CONTACTS

**Chris Hook**  
Director, Warburtons  
Gluten Free

## KEY PRODUCTS

Gluten Free 4 White Thins  
Gluten Free Round  
White Wraps  
Gluten Free 4 White Rolls  
Gluten Free 4 Brioche Rolls  
Gluten Free 4 Soft  
White Pittas  
Gluten Free 4 Fruity Buns  
Gluten Free Crumpets  
Gluten Free Seeded Rolls  
Gluten Free 300g  
Multiseed Loaf  
Gluten Free 300g  
White Loaf  
Gluten Free Artisan  
Tiger Bloomer  
Gluten Free White Bloomer  
Plus, a range of  
core products

Over the past year, Warburtons has achieved remarkable growth in the free-from bakery sector, with sales increasing by 17.1% year-on-year, significantly outpacing the market's modest 1.5% growth<sup>1</sup>.

Despite challenges, such as shifting consumer perceptions of the free-from category, the company's success has been driven by its commitment to providing high-quality products that never compromise on taste or choice, says Chris Hook, director of Warburtons Gluten Free. Warburtons has also focused on innovation and addressing uncatered needs, which has helped maintain strong consumer demand and overcome market challenges, he notes.

## Superior quality and innovation

As the UK's No.1 free from bakery brand<sup>2</sup>, Warburtons is committed to leading the category through superior quality and innovation, says Hook. "This is evident in the successful launch of the Gluten Free Soft White Pittas, which have surpassed 1.5m units since April 2024, alongside the continued success of our Soft Rolls range, which saw an 8.6% growth<sup>3</sup>," he says.

"Our focus on delivering high-quality products has been key to our success in the free-from category. We are committed to providing gluten-free consumers with a variety of products that don't compromise on taste or quality. Looking ahead, we're excited to continue meeting the evolving needs of gluten-free shoppers and growing the category through continued innovation."

And consumers don't need to look too far ahead for new exciting quality products to boost their mealtimes, as Warburtons' strong pipeline of innovation has seen two new products hit the shelves this April – Gluten Free Brown Soft Pittas and Gluten Free Seeded Tiger Bloomer. Both uphold the same high-quality standards as their non-free-from counterparts, ensuring gluten-free customers enjoy the same great taste that Warburtons is known for, adds Hook.



“Our focus on delivering high-quality products has been key to our success in the free-from category”

## Consumer connection

Marketing and merchandising remain central to a brand's success and Warburtons' 'It's Gluten Free. Honest' 360-degree marketing campaign has supported the brand's growth, connecting with consumers and bringing fun to the category, he adds. "Warburtons also invests in and works closely with retail partners to maximise in-store presence and visibility, using a mix of media assets and in-store promotions to highlight new product launches and special offers.

"Historically, free-from shoppers have had to shop from a limited product range, so it's fantastic to see retailers working with brands to ensure shoppers with dietary requirements no longer have to compromise or miss out on choice or quality. Investment in space and ranges in-store means shoppers can be genuinely excited about the free-from products on offer."



## Source

<sup>1</sup> Nielsen Scantrack, Total GF bakery unit sales YOY change by bakery brand vs LY, Latest 12 weeks, Total coverage, w/e 23.03.25

<sup>2</sup> Nielsen Scantrack, Total GF bakery unit share by bakery brand across retail channels & retailers, Latest 12 weeks, Total coverage, w/e 23.03.25

<sup>3</sup> Nielsen Scantrack, Total GF bakery unit sales YOY change by bakery segment, Latest 12 weeks, Total coverage, w/e 23.03.25





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# How RAW inspires vibrant living

## DETAILS

**Windmill Organics Ltd**  
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Kingston upon  
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t: 020 8547 2775

## KEY CONTACTS

**Noel McDonald**  
Managing Director  
**Donata Berger**  
Sales Director  
**Carmen Ferguson**  
Brand Manager

## KEY BRANDS

**Biona**  
**Profusion**  
**Amisa**  
**RAW**  
**Bonsan**  
**Biofair**

It's now estimated that nearly half (48%)<sup>1</sup> of UK consumers are looking for food that improves their gut and Windmill Organics' portfolio can help them meet that need, explains brand manager Carmen Ferguson. "Our different brands – Biona, Profusion, Amisa and Raw – all contain products that are vegetarian or plant-based and certified organic, without any nasty pesticides, stabilisers or chemicals.

"As the name suggests, perhaps the most inherently pure brand in our portfolio is Raw. The ethos behind this is the belief that the food we eat should be as close to its natural state as possible: unfiltered, uncomplicated and untampered with. Good health starts from the inside out; that's why all Raw products are delicious, vibrant, 100% vegetarian and good for the gut."

All of the products in the Raw range are carefully crafted to preserve the natural properties of every ingredient, she notes. "The portfolio ranges from gut-friendly fresh sauerkrauts and apple cider vinegar to indulgent creamy honey and nut butters, as well as olives, olive oil and chia seeds," she says. "We use organic, raw ingredients and, where possible, soak and sprout them to bring their natural vitality to life.



## Source

<sup>1</sup> Windmill Organics market research, October 2024, n=600 consumers

<sup>2</sup> MarketsandMarkets, UK Probiotics Report, published March 2024



**“The ethos behind RAW is the belief that the food we eat should be as close to its natural state as possible. Good health starts from the inside out; that’s why all our products in the RAW range are delicious, vibrant, 100% vegetarian and good for the gut”**

Then we produce at low temperatures to ensure their health-giving nutrients and enzymes stay alive and well.

"Our Raw apple cider vinegar, in particular, is a big retail opportunity right now, as more and more consumers are choosing to start their day with a shot of it neat or mixed with water. Coming in three SKUs – 1L, 500ml, and a 500ml with infused ginger and turmeric – we believe it's the best-tasting apple cider vinegar on the market; the apple mellows the vinegar without making it sweet, bringing a fruity floral note, while the aroma is a pleasant blend of fruity acidity. Plus, it also drives category value, with the 1L bottle at an RRP of £4.79, while the 500ml bottles have an RRP of £3.29."

With over 3m UK consumers now actively avoiding ultra-processed foods, clean-label products are on the rise, and organic food is the gold standard, notes Ferguson. "A key driver in consumers wanting to avoid UPFs is because of the increased understanding of their impact on the gut and the importance of intestinal wellness for overall health," she says.

The UK is now one of the largest markets for gut health products<sup>2</sup>, with a surge in demand for probiotics, used particularly as functional food and beverages. While the core target market is often health-conscious women in their mid-20s to 40s, in reality a very broad group of consumers now have an interest in gut health and wellness.

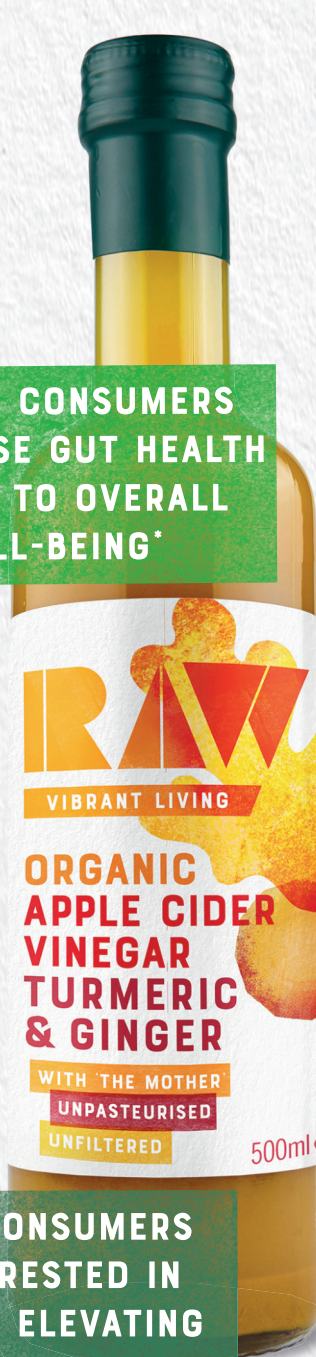


# BOOST SALES WITH RAW VIBRANT LIVING'S ORGANIC APPLE CIDER VINEGARS

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organic vinegars offer a healthier alternative*

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CAPITALIZE ON THE 17%  
GROWTH IN RAW VIBRANT  
LIVING'S CATEGORY



51% OF CONSUMERS  
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DIGESTIVE HEALTH

60% OF PEOPLE WITH  
GUT HEALTH ISSUES  
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- 100% ORGANIC
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Source: Windmill Organic Sales Data 2023-2024 \*





# William Reed.

**William Reed LTD.**

Broadfield Park, Crawley, West Sussex RH11 9RT

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