

Free from & plant based



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While the free-from and plant-based category may have seen some consolidation during the UK's recent economic downturn, brands now have a keener focus on clean ingredients and clear provenance as they fight to maintain on-shelf space in a competitive market. And there's an air of renewed determination to meet consumers' demands on taste and texture.		Achieving steady growth for its gluten-free flours and food	
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Analysis

Leaner and healthier

While the free-from and plant-based category may have taken some body blows during the recent cost-of-living crisis, brands are coming out fighting with a focus on cleaner ingredients and clear provenance

➔ The free-from and plant-based category appears to have been undergoing a period of self-reflection, caused in part by the cost-of-living crisis and consolidation across the board.

While consumers are still very much focused on healthier eating habits and concerns with the planet, some of the momentum has been taken out of free-from and plant-based brands as wallet-watching flexitarians, in particular, have reverted to former eating habits.

A recent article by PR and marketing business Ceres PR¹ sums it up succinctly when it points to both positive stories on plant-based “as one of the fastest-growing food categories, projected to reach [a global value of] \$162bn by 2030”, according to figures from Bloomberg, but also noting the headlines that paint a less than positive picture of “businesses

going into administration, brands admitting a drop in revenue and retailers reducing their vegan ranges” with sales of meat alternatives down 13.6% over the last year.

Yet the emerging story, as highlighted by suppliers in this supplement, is one of a leaner but healthier industry, with a renewed determination to focus on great-tasting free-from and plant-based foods with positive nutritional benefits and clean ingredients labels, standing independently as a category rather than being seen just as an ‘alternative’ option.

Sector performance

Continuing turbulence in the global economy led to a huge shift in consumer behaviour last year, impacting the performance of a number of food and drink categories, says Cauldron

Foods consumer director Gill Riley. It’s important to remember that the slowdown in growth for the plant-based category came against a backdrop of many years of strong growth, she says, but admits that some plant-based products launched in the last few years lacked the “key requirement in this (or any) food sector: taste”. And this contributed to an unfair association with all plant-based foods, she notes.

“Cauldron is on a mission to turn things around, capture the imagination of plant believers and catapult their taste buds to another plant-based dimension,” she adds.

Over the last 12 months the plant-based sector has undergone a period of consolidation and reconciliation, acknowledges Myco CEO David Wood. “While market growth has

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started to show signs of recovery, the race to understand [plant-based] consumers and develop the products they require continues to focus the industry's attention. In the realm of 'public opinion', the sector has been continually challenged over its environmental, health and food sustainability claims. As such, Myco has reviewed both its mission and its operating structure and subsequently, in early May, will be launching a new range of genuinely sustainable products that are grown, manufactured and consumed in the UK."

In chilled, the plant-based market has continued to struggle with the category down -7% in the last 52 weeks, accelerating to -12.5% in the last 12 weeks², says Jason Fordham, customer insights director at The Compleat Food Group. "This is partly down to flexitarian consumers, who had previously driven market growth, switching back to cheaper meat-based alternatives as the cost of living continues to impact household budgets. Brands' plant-based ranges are having to work even harder as they go head-to-head with their meat counterparts to fight for space in shoppers' baskets." The Compleat Food Group is tackling this by creating plant-based food that "tastes great and offers good value, as well as driving innovation through NPD that encourages flexitarians, as well as vegans and vegetarians, to buy into the category", he notes.

With consolidation in the number of pure meat-alternative brands in the last 12 months, there has been media speculation that the plant-based bubble has burst – but data demonstrates that isn't the case³, says Christa Bloom-Burrows, brand director at Biff's. In frozen, customers are supporting more authentic and innovative plant-based brands over 'me-toos', she says. "The biggest losses, on a full-year basis, come from bigger legacy brands and the meat players who made quick 'brand extensions' into plant-based."

As such, she adds, authentic and challenger brands, like Biff's, that are genuinely committed to changing perceptions and delivering quality and healthy alternatives for people and the planet are growing in the context of this overall decline. In fact, veg-led was by far the fastest-growing segment of plant-based alternatives in the 52 weeks to January 27th, at +270% YOY⁴.



Although Jack Rutherford, commercial director at THIS, has seen sales of plant-based decline in the last 12 months, he says the downward trend has started to soften, which is perhaps a reflection of some of the cost-of-living pressures starting to ease, he says. "Potentially, we are starting to see some of the benefits of brand and product rationalisation coming through. THIS grew revenues by 47% in 2023⁵, showing there is still strong demand for high-quality meat alternatives.

"Plant-based is still going through a necessary consolidation phase. In contrast to recent years, we are no longer seeing shelf space expand within chilled meat-free and are now seeing some space declines. However, this is more of a correction to space expanding ahead of sales in recent years, rather than reflecting a big shift away from meat-free products. There have been a lot of product and brand launches in recent years and

not all products have hit the mark for consumer expectations."

Dairy alts and plant-based drinks

Notably, the dairy alternatives market is seeing good performance, with a plethora of oat-based milk brands, in particular, launching new iterations.

Over the last year, plant-based dairy value sales have grown (+7.6%) year-on-year (YOY), with total sales of c.£680m⁶, says Stuart Ibberson, brand & sustainability director at Arla Foods. "We are seeing slight volume decline (-2.6%) due to cost-of-living challenges. However, the oat category is seeing the opposite trend, with volume up 5.8% YOY, and now accounting for over 40% of plant-based dairy volume⁷."

Since its launch in 2020 Arla JÖRD has become the 4th-largest brand (excluding own label) in the oat category and has grown volume (+28.1%) ahead of the total oat-based dairy category (+5.8%)⁸, he adds.

Free-from shows ‘no sign of slowing’

The gluten-free market continues to rise, and Freee CEO and co-founder Clare Marriage says she has seen strong growth in the biggest category of gluten-free flour (+15.3% value and +10.5% volume)ⁱ. Gluten-free ready-to-eat (RTE) breakfast cereal is also seeing good growth with branded performance up 14% in value and 4.8% in volume over the past year compared to a decline in total RTE breakfast cereal of 5.1%ⁱⁱ, she reveals. Within these sectors, Freee has seen the value growth of its gluten-free flour range rise by 18.1%, with volume up 5.8%, while its RTE gluten-free organic breakfast cereal is up 14.4%

in value and 7.7% in volume. “We find consumers in gluten-free are looking for new, great-tasting products as much as everyone else,” she adds. “Given there is often less choice in gluten-free categories, this could be as simple as introducing already established flavour trends.” This April, the company has launched its Freee Gluten Free Cinnamon Hoops, a popular mainstream breakfast cereal that has largely been ignored in gluten free until now, she says.

Bakery is a top performer in the free-from category, growing by 8.5% in value and 2.2% in volume from 2022 to 2023ⁱⁱⁱ, making it

the second-fastest growing category in free-from, says Genius Foods head of marketing Lauren Harber. “Free-from might once have been considered a short-term trend, but with a forecast category growth rate of 11.8% between 2024 and 2032^{iv}, it isn’t showing any sign of slowing down,” she says.

Via a combination of NPD, refreshed recipes and successful marketing, the company has outpaced the sub-category’s growth, including a 30.5% sales increase in its core sliced breads range^v, she reveals

While there are a host of trends impacting the sector, it is clear that free-

from has transcended short-term trends, says Harber. “Though, initially, consumer choice was driven by diagnosed dietary needs, as awareness around the link between what we eat and how we feel grows, the consumer base will only grow.

“As much as 51% of people in the UK suffer from bloating^{vi} and, for many, this could be linked to gluten. Awareness of the symptom-cause connection remains low, with only 6.5 million currently shopping the free-from bakery category^{vii}, but many millions more suffer symptoms that could be linked to gluten^{viii} – and awareness is growing.”

At Glebe Farm Foods, founder and CEO Philip Rayner concurs that the UK is one of the biggest markets for dairy alternative milks in Europe, with 211.9m litres of plant-based milks consumed in the latest MAT⁹. Within that, oat-based milk accounted for around half of the total¹⁰, he says. “The demand for oat milk has never been higher. When it comes to health, awareness over the benefits of introducing more oats and, in particular, oat milk to the diet has increased dramatically in recent years as people’s attitude towards food and diets has changed.”

The UK plant-based drinks category is now the second-largest in Europe, agrees Oddlygood global CMO Nina Gillsvik. “Oddlygood has seen huge success in Europe where we are a key player in the plant-based drinks category, including our native Finland, with the brand growing 40% YOY on a global level¹¹.”

There is a huge amount of potential

growth left in the plant-based and free-from category as Gen Z and Gen Alpha increase purchase power, adds Gillsvik. “Last year we saw 56% of Gen Z were willing to substitute meat and dairy products with alternatives¹² and this generation has been a key target audience for us. Central to this is the need to reinvigorate the category with high-quality products, interesting flavours and a strong brand proposition.”

Meanwhile, the total UK plant-based alternatives to cheese category is now worth £42.9m¹³, down slightly in value from the previous year, reveals Oliver Richmond, senior brand manager, snacks and spreads at Bel UK. Sales volumes are also a little below the previous 12 months “but that’s not surprising given the ongoing pressure on household incomes”, he notes. He puts his faith in vegans, vegetarians and flexitarians, whom he says are “not ‘flash-in-the-pan, trend-led

consumers, but generally committed to making conscious food choices and with a greater interest in sustainability, the environment and ethical food production”. As a result, while volumes may have dipped temporarily across the category overall, he expects it to continue to grow. “In fact, the UK is the second-largest market for plant-based cheese in Europe; only Germany marks up more sales¹⁴,” he notes.

Clean and fortified

As the free-from and plant-based category continues to refresh its credentials, there is increased focus on clean ingredients and clear provenance.

“We’re seeing a rise in younger shoppers choosing both dairy and non-dairy products to suit their needs,” says Arla’s Ibberson. “As a result, there has been an increasing demand for plant-based products to offer a taste that is as good as – or as close to – traditional dairy products as possible.” With Arla

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Lactofree and Arla JÖRD, the company can offer shoppers both options. “In fact, the focus on taste is a major part of the recent relaunch of Arla JÖRD, as well as highlighting its products are now fortified with vitamins D and B9, as well as being a source of fibre.”

Over the next period of the sector’s development, we will see a trend towards cleaner labels to meet consumer demand for products that have not been ultra-processed, says Myco’s Wood. “On-pack validation of environmental credentials will also become more prevalent as the industry strives to overcome allegations of greenwashing,” he notes. “To achieve this, the sector will need to review not just its recipes but its entire supply chain. The days of saying ‘it must be greener because it’s meat free’ are gone! Consumers are much more savvy; they recognise that products containing soy shipped from Brazil or pea shipped from Canada is not as sustainable as sourcing ingredients grown locally.

“It’s not rocket science. Myco’s new Hooba range is made from mushrooms that are vertically grown at our manufacturing plant in the UK, so there are zero miles between the farm and the production unit.”

Biff’s Bloom-Burrows agrees that the bubbling conversation around ultra processed foods (UPF) is clearly impacting customer trust in some meat-mimic products, which feature long and unknown ingredients lists. “But the increased demand for veg-led is also being driven by a more nuanced understanding of health and wellbeing from Gen Z,” she says. “Younger consumers are thinking beyond the amount of protein in a product: gut health, fibre, whole-plant ingredients are important considerations – alongside the ‘eat 30 different fruit and veg a week’ method being advocated by leading nutritionists such as Dr Tim Spector. As a result, customers are looking to experiment more and discover new ways of using fruit and veg – they want to see more creativity and variety of nutritional benefits from products.”

The UPF debate is the latest iteration of shoppers being more discerning with what’s in the products they buy, agrees Rude Health co-founder Camilla Barnard. “Increasingly, people want clean deck, simple ingredients lists with only recognisable ingredients.



Rude Health stacks up well here as we only use organic kitchen cupboard ingredients to create our drinks. And this touches on a key point that will always be central to growth – taste. Consumers will look for various benefits but if a product doesn’t taste great, then they won’t buy it again.

“The other factor that continues to be paramount is price,” she adds. “This doesn’t mean shoppers only want cheap products, but it means that if you are a premium product, like Rude Health, you need to offer great value for money, otherwise people will prefer to choose a cheap option.”

Cauldron Foods’ Riley points out that recent survey results from Tesco¹⁵ show plant-based eating is still on the rise, and shoppers are seeking versatile ingredients such as tofu as they look to cook more vegan and veggie meals at home. “We’re bridging the gap for plant-based shoppers whom we know from our research are seeking great-

tasting, healthier and more convenient plant-rich protein,” she says. “The increased media narrative on UPF means consumers are, understandably, taking more notice of ingredients and trying to navigate the confusion of how this relates to their diets.”

However, despite the “growing national conversation” around health, ingredients lists and UPFs, with some plant-based products implicated in this, recent consumer research by THIS has shown that taste and price are still the primary barriers to purchase in the category with ‘ingredients/processing’ coming in third, reveals Rutherford. “There’s still a lot of consumer confusion around health and the concept of UPFs,” he says. “Research shows that actually, among UPF sub-groups, associations with cancer and heart disease were most notable for animal-based proteins and plant-based alts were not associated with this risk¹⁶.” THIS is focused on making

It's all a question of taste

Taste is everything, says Myco CEO David Wood. "Our mission is to produce the most delicious and environmentally sustainable food. If our food doesn't taste great, then it won't be eaten and we won't fulfil our mission."

"If something doesn't taste great, you're not going to want to buy it again," agrees Cauldron Foods consumer director Gill Riley. "Our new Veggie Bakes capitalise on fresh and trending flavours. The combinations of Spinach & Carrot and Pumpkin & Caramelised Onion are perfect pairings that can be enjoyed alongside other ingredients to span

seasons throughout the year."

Recent data by Smart Protein Project^{ix} suggests that, more than anywhere else in Europe, UK consumers' perceptions of plant-based are driven by taste – products not being tasty enough remains the second-biggest barrier for entry after cost, says Biff's brand director Christa Bloom-Burrows. "But in plant-based, taste has been too focused on 'tasting like meat', whereas instead, shoppers want things that just taste great. In 2024, we're seeing a shift towards flavour discovery over flavours that replicate meat." Biff's has recently worked

with several creators to develop recipes that fuse traditional Middle Eastern, Indian and Caribbean flavours with its classic Jackfruit Wings and Burger Cutlets, including a Jackfruit Kathi Roll and a Jerk Jackfruit Burger, she reveals.

Free-from should not be a taste compromise, says Freee co-founder Clare Marriage and fortunately, today, most free-from foods aren't, she says. "It is important that taste is communicated strongly and, to this effect, we are relaunching the packaging for our Freee Gluten Free Pasta and Gluten Free Oat Bars this spring, bringing in more

colour and cues from the natural world to drive taste appeal."

Meanwhile, Jason Fordham, customer insights director at The Compleat Food Group, observes: "If we want more consumers to eat plant-based food and attract more shoppers to the category, we need to show them that plant-based products can genuinely compete with meat when it comes to taste and texture." Products such as its Squeaky Bean NYC Pastrami Slices are helping it win over not just vegan but flexitarian consumers too, who are "vital to the future growth of the plant-based category", he says.

sure it highlights to consumers the nutritional benefits its products already have compared to animal protein equivalents, he adds.

At Doves Farm Foods, Clare Marriage, CEO and co-founder of Freee, also acknowledges "lots of conversation about UPF" and says that, looking ahead, the brand will be tapping into wider trends for shoppers seeking out healthier, more natural and less processed foods through a renewed focus on its organic Pasta and Oat Bar ranges. "Freee aims to have simple, clean ingredients labels for all of its products, which people can easily understand," she says. "Undoubtedly this contributes to the growth we have seen in our gluten-free organic breakfast cereals."

"Another trend we are seeing is towards free-from+, with many shoppers looking for added benefits beyond products free-from credentials, such as high fibre or protein. In May,

Freee is launching two new flavour variants of its gluten-free high-fibre oat bars – Cranberry and Banana & Chocolate – to capitalise on this trend.

Glebe Farm Foods' Rayner says that, when purchasing plant-based milks, taste is essential, as 78% of food and drink occasions are chosen for enjoyment⁷. "In the UK, 49% of consumers now choose a plant-based alternative over a dairy counterpart due to reasons related to taste¹⁸," he reveals. "Taste is key with many seeing their choice as a treat as much as it is for health or sustainability reasons. Which means that, in the plant-based milk category, where 38% of new buyers switch to plant-based milks to 'try something new'¹⁹, brands are king." The company's PureOaty brand is naturally sweet and creamy, ideal for cereal, smoothies and barista-quality coffee, he notes.

Clean label, natural and nutritional benefits, plus local provenance trends

are playing into the rise in oat drinks' popularity, adds Rayner. "Oats are often hailed as a 'superfood' thanks to their numerous health benefits, being high in fibre and having the ability to lower cholesterol²⁰," he says. "Over a third of current oat milk drinkers says they've noticed positive changes in their health over the past year because of switching to oat²¹."

Glebe Farm Foods champions local Cambridgeshire farmers with a number of collaborative initiatives to enhance its oat milk products. "Maintaining a low carbon footprint is important to the 54% of UK shoppers who actively look to purchase British produce²², he notes.

Bel UK's Richmond believes there is a significant growth opportunity for retailers to expand their offerings with more plant-based and free-from products. "Currently, 42% of shoppers follow or would consider following a flexitarian diet, 45% would consider a vegetarian diet and 25% a vegan diet²³,

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showing that plant-based options appeal to a broad consumer base,” he says. “The probability is that even if one person in a household is strictly plant-based, the rest of the family are more likely to join them in some of their alternative choices.”

A taste for NPD and new ingredients

Myco’s Wood predicts there will be a plethora of new products launched over the next 12 months. “At Myco, the launch of our Hooba range in early May is centred around products that only contain five key kitchen cupboard ingredients, as well as utilising ingredients from our on-site farm. In September, we will be launching a further range of fermented tempeh products that will be manufactured using our own ‘low processing’ manufacturing methods.”

Biff’s points to the use of algae and tofu as part of plant-based fish, and jackfruit, beans and mushrooms in place of soya and pea protein in meal-alts as key focuses over 2024. “This was recently bolstered further by Great British Menu winner Kirk Haworth, whose innovative vegan menu favoured while plants over classic meat-alts,” says Bloom-Burrows. “Searches for vegan fish spiked around the time of Kirk’s winning plant-based fish course aired on TV²⁴.

“There’s also a desire to do staple ingredients like tofu better,” she adds. “While hugely popular among the initiated, there’s still a lack of products on the market that help the more ‘novice’ chef cook tofu seamlessly – creating a huge opportunity to increase the category to new shoppers.”

As plant-based consumers are still highly engaged with innovation and newness, it’s really exciting to see new trend still coming through, says THIS’ Rutherford. “We’re working on a new whole-food based and minimally processed range, set to launch in early 2025, As well as this we’ll still be working on bringing to market meat alternative products that really push the category forward for taste and texture, such as our THIS Isn’t Chicken Shawarma, launched in early April and our THIS Isn’t Chicken Thighs, which will launch in May.”

The Compleat Food Group says the chilled plant-based fish alt market is a still “at an embryonic stage, worth £7.5m²⁵” compared to the total fresh



fish market at £1.87bn²⁶. “However, consumers are crying out for good fish alternatives, with our research finding that 20% of vegans/vegetarians miss eating salmon²⁷, and while many are concerned about depleted fish stocks and the ocean, they still want the benefits of eating fish.” The company launched its first-plant-based fish range under the Squeaky Bean label, with its ready to eat Beechwood Smoked Salmon Style Slices – the first vegan product of its kind to be available in major retailers, says Fordham. “Alongside this, we launched our Tuna Style Flakes, designed to perfectly replicate the distinctive taste and texture of tuna.”

In addition, Fordham points to the opportunity of plant-based cheese, introducing its Palace Culture brand, which is creating products based on premium soft cheeses, using a blend of organic cashews, almonds, herbs and spices, he notes.

Also using almonds as a key ingredient in its cheese alternatives, Bel UK launched The Laughing Cow Plant Based – “the first UK brand to offer an alternative to cheese spread portions” last year, says Richmond. “Made with almonds it boasts a smooth spreadable texture,” he notes.

This year, Oddlygood has launched Barista Oat Drinks in Vanilla and Salted Caramel flavours in the UK, as well as its gluten-free Dreamy Desserts (made using a combination of oat, fava bean and coconut and enriched with vitamin D, B2 and B12 for added nutrition) in Lemon, Berries, Gingerbread and Caramel flavours. “Product quality – primarily taste and texture – is key to driving category growth,” says Gillsvik. “We’re continually looking at ingredients and methods that will drive our product quality.”

While oat is a well-established ingredient in the category, Rude Health’s Barnard believes the



company's Organic Oat Barista offers both a clean deck and great functionality, which it says will help consumers to upgrade their home experience. "It has only four natural ingredients, doesn't split and foams beautifully," she says.

There has certainly been a trend for shoppers looking for more natural, unprocessed foods in the last year and our data is showing that even more shoppers have been buying whole milk, says Arla's Ibberson. "Earlier in April, we launched a new two-litre Arla Lactofree whole milk format – following the success of our 2L semi-skimmed product – and in response to consumer demand."

Later this year, Arla will launch Lurpak Plant Based Spreadable 400g. "As the category leader²⁸, we felt it was the right time for Lurpak to introduce a plant-based option ... and we believe it will attract a new, younger consumer to the brand."

Key barriers to consumption

The barriers to entry into plant-based are similar to any new category – it's about reducing the risk of trying something new, says Rude Health's Barnard. "Shoppers want to know something will taste great and work as they expect it to – and if it's at a price that makes sense for them. Price is always a consideration, but shoppers are prepared to pay more for products that give them more – great taste, high-quality ingredients, perfect functionality, sustainability credentials."

Mycos Wood says the company's consumer insight has led it to believe that taste, health, sustainability and provenance are the key factors influencing consumers at present. We believe that our new Hooba products will lead the way on all these factors," he adds.

Cost, organoleptic, texture and the concern around being too processed are the biggest barriers to overcome, according to Mintel²⁹, says Biff's Bloom-Burrows. "But to create consumer confidence with a brand, it's health, ethics and sustainability that fuel stickiness," she argues. "At Biff's all our products are carbon-assessed by a leading company in this field, My Emissions, and we challenge more brands to carbon-label their products and put their sustainability where their mouth is."

Taste is the number one barrier for consumers to try plant-based, believes Arla's Ibberson. "But this is a challenge we are aiming to overcome by focusing on Arla JÖRD's great taste and product experience. Health is also an important driver of choice, so we enrich Arla JÖRD products with nutrients that help consumers eat well, but we still don't believe this fully replaces the role of dairy in the diet. At Arla, we believe that dairy is best at providing dairy nutrition, so we will not try to replace dairy nutrition in our plant-based products but will focus on nutrients that support deficiencies in the UK and EU markets."

Bel UK's Richmond comments: "The barriers to adopting a plant-based diet used to centre on lack of availability and choice of alternatives to dairy. This is no longer the case, so retailers need to ensure they stock products to appeal to different consumption occasions. In terms of key messages, we believe

that sustainability and ethical food production are at the heart of shopper choices."

Taste will never not be important in food, says Genius' head of marketing Lauren Harber. "We know that taste perceptions are a barrier to entry for the free-from category³⁰ and, beyond that, free-from consumers really don't want to feel like they are missing out on things available in conventional food and drinks," she says. "More than almost any other category, free-from brands need to be clear that their products are not 'less than' the alternative and ensure consumers understand that too. At Genius, that means we focus on food that allows people to reduce symptoms and improve their quality of life without compromising on taste.

"Recently, we've driven significant innovation in morning goods to provide variety and indulgence through new and unique choices that previously weren't available in free-from. Since launching our Genius gluten-free Blueberry Pancakes and gluten-free Orange Dark Chocolate Chip Pancakes, we've seen a 36.5% increase in incremental spend and a 5.2% point share growth as a brand³¹."

Oddlygood's Gillsvik notes: "The UK is thirsty for fresh thinking in the plant-based drinks category. Our mission is to raise the standard of plant-based products so that taste can no longer be a consumer barrier." With its founding company Valio a major player in the international dairy products market, this has allowed Oddlygood to understand in depth the plant-based and flexitarian consumers' frustrations around quality, taste, and texture to create a range of genuinely interesting products and flavours that are simply great in their own right, not just alternatives to milk, she says.

While taste perception has long been a barrier within the plant-based sector and Cauldron Foods has been working hard to change that, shoppers are also still working through financial challenges, with inflation across the board still high, but easing, says Riley. "This means they are more aware than ever before of shopping budgets and the individual cost of trying new products," she says. In addition, sustainability has and will continue to be a big part of Cauldron's business, she notes. "We're meeting internal targets and doing as

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much as we can to limit our impact on global warming.”

Balance for the future

Glebe Farm Foods' Rayner says misinformation around reasons for a gluten-free diet and coeliac disease remains a constant battle. He cites an instance on ITV's *This Morning* later last year, where presenters referred to coeliacs requesting none of a family Christmas dinner to have gluten in it as “completely unreasonable”, treating the disease as a choice rather than a life-threatening situation. “Education conversation and products inclusive of plant-based and free-from restrictions being in the mainstream, rather than seen as ‘an alternative’ are key to changing this,” he says. “For example, although 91% of dairy milk is produced in Britain³², more than 80% of oat drinks are imported³³. This surprises many consumers, particularly those who have switched to a plant-based diet due to a desire to reduce their own carbon footprint.”

Alongside, this one of the main challenges for the oat production industry remains transparency around sustainability practices, he adds. A survey by Glebe Farm Foods revealed that almost two-thirds of consumers felt it important to know about the source of their food and drink³⁴. “However, this information isn't always readily available,” he says.

Biff's Bloom-Burrows says that, with the increasing growth in veg-based products, there is huge opportunity to expand the category with flavour-first, veg-first and cleaner deck items that can bring in consumers who were “turned off either due to concerns about ingredients and nutrition or by poor-tasting ‘first generation’ meat mimics”. “But to achieve this veg-led revolution, we must look beyond the obvious scratch cooking and help less confident shoppers with products that still use quality natural ingredients, but are also easy to prepare and offer guaranteed taste and texture,” she notes.

While the UK is technically in a recession, the inflation rate is declining so the income squeeze should ease, reducing the price premium challenge the category often faces, says Genius' Harber. “If players in this space continue to champion the free-from diet for those who currently choose to



follow it, and make the case for those who do not, 2024 will yield growth. There is huge growth opportunity within what is still a relatively young category.”

Plant-based products aren't new any more; it's a saturated market which has highly competitive shelf space and effective own-label offerings, points out Oddlygood's Gillsvik. “However, we do see this as our biggest opportunity – to add new life to the category. We've invested heavily in expanding the brand and its larger vision of driving the standard of plant-based food and drink.”

At THIS, Rutherford says the plant-based sector's biggest opportunity lies in players ... reshaping the category around the pillars of taste and nutrition to ensure consumers have a great experience and want to keep coming back. “The one thing that stands out for me is ... the positive impact we can have on animals and the environment, which is a huge opportunity and a huge responsibility,” he says. “We want to change the way people eat.”

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- ²⁰ Healthline, 9 health benefits of eating oats and oatmeal, Katherine Marengo, Nov 2023
- ²¹ Research commissioned by Glebe Farm, 29-31 March 2023, n=2000 UK adults
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- ²⁶ Kantar Category Gold Data, last 52 wks to 18.02.24
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- ²⁸ Based on NielsenIQ RMS data: BSM, Total Conv, incl Discounters, Volume Growth w/e 27.02.24
- ²⁹ <https://tinyurl.com/ys9et2ez>
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- ³² AHDB, Dairy market and self-sufficiency webinar, Dec 2020
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- ³⁴ See 22

Free-from

- ⁱ NIQ, GB Grocery Multis, 52 w/e 24.02.24
- ⁱⁱⁱ Kantar Worldpanel, 52 w/e 16.04.23
- ^{iv} EMR Claight, Global Free From Food Market Outlook, 2023
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- ^{vii} Kantar Worldpanel 52 w/e 01.10.23
- ^{viii} Coeliac UK, 10.04.19

Taste

- ^{ix} Navigating Plant-Based Preferences in Europe: Lessons from the Smart Protein Project, Elsa Guadarrama, Pro-Veg International, April 2024

Arla Foods UK

Lactose-free goodness

DETAILS

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brands/lactofree/

KEY CONTACTS

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Arla Brand &
Sustainability Director

KEY BRANDS

- Arla LactoFREE**
- 2L Semi Skimmed Milk
 - 2L Whole Milk
 - 1L Semi Skimmed Milk
 - 1L Whole Milk
 - 1L Skimmed Milk
 - 1L Organic Semi Skimmed Milk
 - UHT Semi Skimmed Milk
 - UHT Whole Milk
 - UHT Milk Portions
 - Cream
 - Spreadable
 - Mature Cheddar
 - Grated Mature Cheddar
 - Soft Cheese

➔ Arla Lactofree offers the goodness and great taste of dairy, but without the lactose. “All Arla Lactofree products are made from cow’s milk, and provide a natural source of nutrients, such as calcium, protein and vitamins B2 and B12,” explains Arla brand & sustainability director Stuart Ibberson. “We’ve simply removed the lactose via patented non-infiltrating technique.

“At Arla Lactofree, we believe a life without lactose won’t stop you enjoying what feels good, which is why we’ve developed a range that means shoppers don’t have to miss out on the things they love most about dairy,” he says.

“Our milk range offers the same choice as regular dairy, from fresh or long-life skimmed, semi-skimmed and whole milk. We also offer a delicious selection of real full-flavour cheese, just lactose-free. Our cream adds a silky extravagance to everything it touches, and Arla Lactofree Spreadable is delicious and 100% natural.”

Introducing a whole 2L product

Arla is committed to creating nutritious, affordable products for shoppers to enjoy as part of a healthy and balanced diet, notes Ibberson. “There has been a trend for shoppers looking for more natural, unprocessed foods in the last year, and our data is showing that even more shoppers have been buying whole milk. Earlier this month, we launched a new 2L whole milk Arla Lactofree format – this launch follows the success of our 2L semi-skimmed product, and is in response to consumer demand for a whole milk option. Whole



“At Arla Lactofree, we believe a life without lactose won’t stop you enjoying what feels good, so we’ve developed a range that means shoppers don’t have to miss out on the things they love most about dairy”

milk over-indexes with families, so this new 2L whole product is a convenient option for bigger households, allowing us to widen our target market further.”

A new look for Arla Lactofree

Over the last year, the cost-of-living crisis has seen shoppers switching to purchasing own-label products, but this trend has now reversed, with shoppers coming back to their favourite Arla brands in the second half of the year, he says. “Arla Lactofree continues to grow as a brand, increasing in both value (+4.4%) and volume (+9.3%) in the last 52 weeks. In particular, the last 12 weeks have seen high increases in volume (+25.5%), which supports the trends of shoppers moving back to purchasing brands¹.

“Arla Lactofree is part of the Arla family, and sits alongside other brands, such as Arla Cravendale and Arla Jörd. Last year, we launched our first-ever Masterbrand TV advert as part of a strategic push, helping consumers connect Arla with its sub-brands, and we’re taking this a step further this year.

“It’s our ambition to continue to build momentum behind the Arla brand. We’ll be unveiling a new look across Arla Lactofree packs this year, as well as a summer marketing campaign to build brand awareness and trial.”



Source
¹ Nielsen, 52 w/e 23.03.24

Arla Foods UK

Introducing Arla JÖRÐ

DETAILS


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KEY CONTACTS

Stuart Ibberson
Arla Brand & Sustainability Director

KEY BRANDS

Arla JÖRÐ
– Oat Drink 1L
– Oat & Hemp Drink 1L
– Oat & Vanilla Drink 1L
– Oat Drink UHT 1L
– Strawberry Oat fermented product 400g
– Vanilla Oat fermented product 400g

 Arla JÖRÐ offers a tasty range of Nordic oat-based drinks and fermented products. Jörd was the mother of the god of thunder, Thor, and her beautiful name means earth in old Norse, reveals Stuart Ibberson, brand & sustainability director at Arla.

“We chose the name Arla JÖRÐ because not only are our oats sourced from the Nordics, but we’re also proud of our Nordic brand heritage – it runs right down to our roots, through everything we do to create delicious great-tasting products,” he says. “We do things differently at Arla JÖRÐ, we do things ‘Nordically’.”

JÖRÐ has established itself as a strong contender in the plant-based milk category over the last three years, he adds. “However it’s our ambition to continue to build momentum behind the Arla brand, which has led to JÖRÐ being relaunched to become Arla JÖRÐ, earlier this year.

A fresh re-launch for 2024

As part of the relaunch of Arla JÖRÐ, the packaging design has been updated to feature the Arla brand, creating consistency with other Arla products such as Arla Cravendale and Arla Lactofree, where the packaging design has also been updated, he notes.

“Alongside the brand refresh, Arla JÖRÐ continues to focus on offering great-tasting, nutritional products and is now fortified with vitamins D and B9, as well as being a source of fibre.

“In the UK, we are retaining our Arla JÖRÐ range portfolio flavours, which consist of 1L ESL Oat, Oat & Hemp, Oat & Vanilla and UHT oat drinks, along with our 400g Strawberry and Vanilla fermented oat products.



“Not only are our oats sourced from the Nordics, but we’re also proud of our Nordic brand heritage – it runs right down to our roots, through everything we do to create delicious, great-tasting products”

“We have invested over £2.9m in the Arla JÖRÐ launch campaign, including both above-the-line and shopper activations.

“From April 2024 shoppers will see our new digital campaign celebrating the Arla JÖRÐ range, alongside an out-of-home and social media campaign, and during the summer we will launch a further campaign which includes experiential, PR and product sampling.”

Leveraging the Arla masterbrand

The company’s ambition for Arla JÖRÐ is to be able to leverage the impact of its Arla masterbrand as it continues to give shoppers the opportunity to make their plant-based choices within the Arla brand, says Ibberson.

“When we researched the idea to re-launch JÖRÐ under the Arla brand, the reception from shoppers was very positive, and it pays dividends both ways; it strengthens the Arla brand in the eyes of shoppers and strengthens the trust in Arla JÖRÐ as a brand,” he explains.

“Dairy will always be at the heart of our cooperative business, but we are continuing to give shoppers the opportunity to make their plant-based choices within the Arla brand.”

NORDICALLY TASTY

DELICIOUSLY OAT-BASED



NEW RANGE
INSTORE NOW



Bel UK

Familiar favourites

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Anna Petsi
Senior Brand Manager
(Boursin® and Port Salut®)

KEY BRANDS

Babybel Plant Based®
Boursin® Plant-Based
The Laughing Cow®
Plant-Based
Nurishh®
GoGo squeezeZ®

 Bel UK's plant-based range offers trusted and quality alternatives to dairy cheese, in formats and flavours shoppers know and love.

Sitting at the heart of today's biggest food trends – format innovation and healthy eating¹ – there's a Vegan Society-certified, Bel UK plant-based alternative to cheese for every need-state: snacking on-on-the-go, lunchbox, and indulgent dinner for-tonight.

Part of Bel UK's £156.4m² total cheese and plant-based portfolio, and contributing sales of £2.17m to the £42.9m³ plant-based alternatives to cheese category, Bel UK's Plant-Based brands are:

● **Babybel Plant-Based:** a fun, dairy-free alternative to Bel UK's biggest cheese snacking brand. As Mini Babybel Original is one of the most spoken-about cheese brands online, Babybel Plant-Based enjoys the halo effect. With a smooth texture and creamy taste, it is also a source of calcium and B12, plus free-from lactose, artificial colours, preservatives, and soya. Babybel Plant-Based comes in iconic green wax and cellophane recyclable packaging. The paper outer pack can also be recycled at home.

● **The Laughing Cow Plant-Based:** launched last year, this is the first UK brand to offer an alternative to cheese spread portions. Made with almonds, it boasts a smooth, spreadable texture, alongside a calcium and Vitamin B12-rich recipe that's 34 kcals per triangle. The individually wrapped portions maintain its freshness for longer and complement anything from flatbread to crackers, avocados to celery. It can be eaten on-the-go or added to plant-based recipes – its creamy texture and rich flavour make it an excellent substitute for dairy cream cheese in anything from pasta sauces to flavourful plant-based dips and spreads.

● **Boursin Plant-Based:** an indulgent addition to any plant-based snack or informal dining, this boasts a flavourful fusion of garlic, fragrant parsley, and chives, to deliver a smooth spread alternative to cheese, making it



“There's a Vegan Society-certified, Bel UK plant-based alternative to cheese for every consumer need-state”



a perfect little luxury to add to crackers, bread, or a tasty plant-based selection.

● **Nurishh:** completing the line-up of Bel UK's 100% plant-based range, Nurishh Plant-Based Greek Style Cubes joined the portfolio last year and scooped a gold award in The Grocer's New Product & Packaging Awards 2023. A fantastic alternative to the dynamic feta cheese sector that is currently growing at +23 YOY⁴, the gluten- and lactose-free Greek Style Cubes come in a resealable pack that keeps them fresher for longer.

The Nurishh range, which also includes Plant-Based Cheddar Flavour Slices, Plant-Based Garlic & Herbs Spread, a Plant-Based alternative to Camembert and Plant-Based Grated Gran Vegiano, saw a new brand identity, packaging design and compelling offer with higher shopper purchase intent launch this spring. New-look Nurishh makes its debut in Sainsbury's and Asda stores this month (April).

Source

¹ Many of the Nurishh products and MBY plant based contain a source of Vitamin B12. Vitamin B12 as part of a health, varied and balanced diet, contributes to the normal function of the immune system.
² IRI, Total Grocery + Discounters, w/e 23.03.24
³ IRI, Total GB Plant-Based Cheese Alternatives, 52 w/e 23.03.24, -4.5% vs YA
⁴ IRI, Total Market GB, 52 MAT to 30.12.23

STOCK OUR ICONIC PLANT BASED PORTFOLIO



#1 SNACKING ALTERNATIVE¹

#1 PORTION SPREAD ALTERNATIVE²

#1 INDULGENCE ALTERNATIVE³



NEW & IMPROVED PACKAGING⁴

- Higher Purchase Intent
- Higher Taste Appeal
- Higher Aided Recall



1,2,3: ALTERNATIVES TO CHEESE - IRI All Outlets, 52 w/e 25.03.2024, Value Sales
4: PRS IN VIVO 12.12.2023 - NURISHH Quantitative Test - UK; 600 people

Biff's Plant Shack

On track to be UK's top veg-led brand

DETAILS

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Christa Bloom-Burrows
Brand Director

KEY BRANDS

Jackfruit Wings (RSP £3)
Jackfruit Burger Cutlets (RSP £3)

At a time when 21% of shoppers are citing concerns that plant-based foods are 'too processed'¹, veg-based products are truly bucking the trend, rising by 270% YOY in frozen².

And Biff's, the UK's original plant-based and plant-led brand, founded as a street food stall in 2017, has been leading that shifting demand with more 'natural' alternatives that offer memorable eating experiences without the complex ingredients, says brand director Christa Bloom-Burrows. "Biff's Succulent Jackfruit Burger Cutlets and market-first Jackfruit Wings with a sugarcane 'bone' have helped fuel this, consistently in the top 5 value growth contributors across each sub segment³ since their frozen relaunch last year," she says.

Driving awareness to its veg-led product, the brand launched its first OOH campaign this year – 'Plant Based Without The Methyl-Whatsit-Stuff'. "The debate it caused went viral – it



“Biff's offers more 'natural' alternatives that satisfy shifting consumer demand”

was a big 'Yes' moment for consumers. While whole-plant ingredients and gut-loving fibre are increasingly important, shoppers still want bold flavours, indulgence and convenience – all of which Biff's offers by the plate-load.

"We're not stopping with jackfruit," she adds. "With lots of exciting NPD on the way in 2024, we're on track to be the No.1 veg-led brand in the UK."

Source

¹ Mintel, 2023
^{2,3} Nielsen, 52 w/e 27.01.24



PACKED WITH PROPER PLANTS

UNLOCK THE 78% OF SHOPPERS WHO PREFER BIFF'S TO ALT-MEAT*



*Survey of 2470 shoppers, Hashting Jan 2024

First Grade International

Top choice for health-focused coffee lovers

DETAILS

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KEY PRODUCTS

Koko Barista Milk
Koko Kids Free From Milk
Koko Original Milk
Koko Unsweetened Milk

As the demand for plant-based, allergen-free options continues to rise, Koko Dairy Free's Barista Blend has quickly become a favourite among health-conscious coffee lovers, says marketing manager Victoria Eadon. "This innovative coconut-based blend, crafted in collaboration with coffee industry professionals, offers a creamy, frothable, and delicious plant-based milk that perfectly complements any coffee beverage," she says. "What sets Koko's Barista Blend apart is its ability to rival traditional dairy on taste and performance, without the distinctive coconut flavour often associated with other coconut-based alternatives."

The Grocer reported a 30% surge in UK plant-based milk sales in 2022, reaching £400m¹, clearly reflecting the increasing consumer demand for dairy alternatives that cater to various dietary requirements and lifestyle choices, notes Eadon. "In response to this trend, Koko is implementing a multi-channel



“Koko's Barista Blend is able to rival traditional dairy on taste and performance”

distribution strategy to ensure its Barista Blend is readily available in supermarkets, coffee shops and grab-and-go outlets.

“With Kantar forecasting 44% growth in the dairy alternatives sector between 2021 and 2026², Koko is well-positioned to leverage this growth and deliver innovative, high-quality products that resonate with shoppers.”

Source

¹<https://tinyurl.com/bdzz7vuc>
²<https://tinyurl.com/3zucda5j>

NO DAIRY NO SOYA JUST PLANTS

SCAN ME TO LEARN MORE
ABOUT OUR RANGE



Follow us!



www.kokodairyfree.com

Cauldron Foods

Packing a plant-based punch

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Lucy Grogut
Head of Brand Marketing

KEY BRANDS

Cauldron Extra Firm Tofu (220g, RRP £2)
Cauldron Pumpkin & Caramelised Onion Veggie Bakes (200g, £2.75 RRP)
Cauldron Spinach & Carrot Veggie Bakes (200g, £2.75 RRP)
Cauldron Lincolnshire Sausages (276g, £2.75 RRP)
Cauldron Cumberland Sausages (276g, £2.75 RRP)
Cauldron Middle Eastern Falafels (200g, £2.50 RRP)
Cauldron Moroccan Falafels (180g, £2.50 RRP)
Cauldron Authentic Tofu (396g, £2.75 RRP)
Cauldron Marinated Tofu (160g, £2.75 RRP)
Cauldron Hoisin Tofu (160g, £2.75 RRP)

↙ Cauldron Foods has burst back to the front of shoppers' minds with a vibrant new look and a selection of new products, packing a powerful plant-based punch, reveals the company. The range, planted onto shelves earlier this month, contains new veggie centre plate options – Spinach & Carrot and Pumpkin & Caramelised Onion Veggie Bakes – alongside new Extra Firm Tofu.

“The new Veggie Bakes are perfect for shoppers who already follow a plant-based diet or those looking to increase their veggie consumption, but not necessarily wanting to eat a meat replica,” says Gill Riley, consumer director from Cauldron Foods. “They are bursting with powerful plant protein and, most importantly, flavours guaranteed to tantalise taste buds.”

The fun and colourful new look perfectly encapsulates Cauldron products – packed full of vibrant and nutritious plant-based ingredients. Over 90% of consumers said the new look was positively different versus other chilled products available¹, and referred to the new branding as bold, eye-catching, modern and tasty².

Alongside a range relaunch and full packaging redevelopment, the move will reinforce the brand's position as a key player in plant-based eating, driving the category forward, says Riley. “There is a huge opportunity for growth in this channel, with consumers looking to get more veggies into their diets.

“Cauldron is a trusted brand in the category. We're rewriting the rulebook and seeing the category through fresh eyes, working with consumers to deliver the best plant possibilities and making significant brand investment, to connect with shoppers and showcase



“We're here to reignite the brand and capture the imagination of our nation's plant believers and plant curious. There is a huge opportunity for growth in this channel”

just how tasty Cauldron products are.

“Taste is key when it comes to food – and shoppers shouldn't settle for less in plant-based. The category has an opportunity to reinvent itself after months of scrutiny, and we're ready to set new expectations with existing and new shoppers.” Also, as part of the relaunch, the new bold brand identity will come to life via a new-look website and social channels, supported by a strong PR, social and influencer campaign and in-store activation.

Cauldron products are widely known as a more sustainable option for shoppers, with the brand's plant-based product and commitment to sustainability initiatives. Sustainability has always been, and will continue to be, a big part of Cauldron's business, she adds. “We've always been very transparent about the journey we're on, and now we are simply reinvesting and refocusing on areas that can make a bigger and better impact on the planet.”

Source

¹⁺² Research conducted in October 2023 – sample size 301 respondents



Want delicious category growth?
Dive in!



Doves Farm Foods – FREEE

Freee grows in gluten free

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KEY PRODUCTS

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 is a pioneering, family-owned, gluten-free flour and food brand, home to the No.1 gluten-free flour range in the UK¹, as well as other gluten-free home baking, breakfast cereal, pasta and snacking foods.

For more than 40 years, Freee has offered trusted and naturally gluten-free food for every meal occasion throughout the day, reveals CEO and founder Clare Marriage. “Never compromising on taste, Freee manufactures most of its products in-house, in its own modern, dedicated gluten-free facilities, which are subject to rigorous testing regimes,” she says. “This approach has led to consistent growth for the brand over the years, and again this year within its key ranges.”

For example, the Freee ready-to-eat Breakfast Cereals range is up 14.4% (+7.7% in kg)², driven by increased sales of established customer favourites, Chocolate Stars and Fibre Flakes, as well as increases versus last year of the more recent supergrain-focused, Freee Supergrain Hoops, she says. With a new Cinnamon Hoops SKU launching in Tesco and other retailers this spring, breakfast cereals remain a key area for Freee, following a multi-million pound investment into a new gluten-free cereal production plant in 2018.

The brand also has high hopes for the single-serve portion-sized packs in its best-selling cereals range. Soon to be available on Ocado and made without any of the top 14 allergens, these cater to both gluten-free living, and a host of other dietary requirements. In addition, each product is certified organic, meeting the demand for food made from simple, sustainably grown ingredients.



“Never compromising on taste, Freee manufactures most of its products in-house in its own modern dedicated gluten-free facilities which are subject to rigorous testing regimes”

Alongside breakfast cereals, Freee is seeing strong growth across its largest business sector – specialist gluten-free flour, where it is the market leader³. This sub-category has had a strong 12 months, with value up 15.3% and volume rising by 10.5%, with Freee responsible for more than half (53.8%) of the value growth⁴.

“These numbers point to a robust market for gluten-free home baking as consumers entertain at home, as well as make and bake from scratch more to counter the cost-of-living increases,” notes Marriage.

Natural credentials and taste appeal

Looking ahead, Freee will be tapping into wider trends for shoppers seeking out healthier, more natural and less processed foods through a renewed focus on its organic Pasta and Oat Bar ranges, she reveals.

“Both are being given an exciting design refresh in the spring – to emphasise their natural credentials and drive taste appeal,” she adds. “The Oat Bar range will also see two new flavours being launched: Cranberry and Banana & Chocolate.”

To raise awareness of the brand and its range of products, as well as to offer advice, baking and recipe inspiration to consumers, Freee invests significantly in social media alongside an annual programme of marketing activity running across broader digital, print, PR and events.



Source
¹⁻⁴ NIQ, GB Groc Mults, 52 w/e
 24.02.24

Bye bye gluten,

hello delicious!



Tap into the growing free from market with our delicious range of gluten free foods. The FREEE range includes naturally gluten free flours, baking mixes, breakfast cereals, oat bars, cookies and pasta. All our products are certified by Coeliac UK, suitable for vegans, and many are even organic. Offer a complete selection for your free from customers.

Stock up now. Email sales@freee-foods.co.uk or visit freee-foods.co.uk



Genius Foods

Baking up symptom-free deliciousness

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KEY BRANDS

Genius

Source

- ¹ Kantar Worldpanel 52 w/e 01.10.23
- ² Guts UK Charity, August 2016, Digesting The Facts: What people are thinking about their digestive health, DigestingTheFactsReport.pdf (gutscharity.org.uk).
- ³ Circana Unifi, Post 12 w/e 02.12.23 vs Pre 12 w/e 02.09.23
- ⁴ Circana Unifi Salesweb, Value sales, 6 w/e 16.03.24 vs 6 w/e 06.02.24

Genius Foods is the UK's original free-from bakery brand, pioneering delicious gluten-free baked goods since 2009. Today it is continuing its leadership and pioneering an exciting new era for the category, reveals head of marketing Lauren Harber.

Free-from opportunity

With 6.5 million shoppers currently participating in the category¹, Harber notes that: "To date, brands within gluten-free bakery have focused on engaging and servicing those with an existing awareness of their need to reduce gluten. But there are 20 million consumers – almost a third of the UK's total population – who would stand to benefit from free-from foods² who don't know it yet. It is a huge growth opportunity for gluten-free baked goods, standing to triple the current number of category shoppers.

"With so many people out there suffering unpleasant symptoms that



“Our team of expert gluten-free bakers constantly raise the bar for taste and quality”

could be related to gluten consumption, who are not even aware of it, we're helping them connect the dots with a more engaging and emotive approach to communications that avoid the very medicinal style common in the sector," she explains.

Genius has worked hard to ensure its products are truly Deliciously Gluten Free – and is now focused on making

51% of Brits are feeling bloated!¹

It could be gluten!

Each Free From shopper spends **4x more** in store than conventional bakery shoppers²

genius
Deliciously
Gluten Free

✓ GLUTEN FREE

✓ SOYA FREE

✓ MILK FREE

✓ COELIAC UK ACCREDITED



to triple the shoppers in free from

sure consumers know that, adds Harber.

In 2024 the company will be spending over £500,000 on targeted multi-channel advertising. The focus will be on helping those 20 million people understand the potential link between the symptoms they suffer and gluten, and letting them know they can live symptom-free without sacrificing taste or quality.

Raising the quality bar

“Of course, bringing in more consumers means overcoming barriers around taste and perceived compromise common to the free-from category,” admits Harber. “Genius relentlessly focuses on improving the quality of its range with a team of expert gluten-free bakers constantly raising the bar for taste and quality in gluten-free. This is matched by a commitment to new product development (NPD). Genius is working hard to ensure consumers can



find the more of the things they know and love in conventional baking within the free-from category.”

Genius relaunched its sliced bread range in 2023, delivering a better-than-ever taste for everyday gluten-free

goods and leading to a 30.5% sales increase³.

NPD in morning goods also means consumers can go gluten-free without missing out on their favourite breakfast treats. Genius’ new range of pancakes, including Free From Food Awards Silver award-winning Orange Dark Chocolate Chip pancakes, offers consumers variety and indulgence. Initially available exclusively at Asda, the pancakes delivered an incremental sales increase of +103.9% to total free-from pancakes for the supermarket⁴.

Harber says: “As expert bakers and founders of gluten-free bakery in the UK, Genius is perfectly placed to spread knowledge and break down barriers to bring new consumers into the category. We can create a light-bulb moment and ensure millions more people can experience symptom-free deliciousness and feel the benefits of a free-from life for themselves.”

Stock the No.1³ Deliciously Gluten Free Sliced Loaf



It's time to trade up your bakery shoppers!

0800 0192736 | info@geniusfood.com

geniusfood.com @geniusfoodofficial

¹ Holland & Barrett, www.hollandandbarrett.com/the-health-hub/conditions/digestive-health/gut-health-report-2023

² Coeliac UK March 2023, www.statista.com/statistics/248467/global-gluten-free-food-market-size/

³ Circana Unify, Volume Sales, 12we 24/02/2024

⁴ Circana Unify, ACV weighted unit ROS, 12we 24/02/2024

Glebe Farm Foods

‘Toatally’ tasty & gluten-free

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KEY BRANDS

PureOaty

 The UK demand for gluten-free products has never been higher, with an estimated 10% of consumers following a gluten-free diet and the sector now worth around £835m per year¹. While many are simply looking to improve gut health, combat bloating, or ease a sensitive stomach, around one in 100 UK consumers have coeliac disease and must avoid gluten altogether².

“Consumers should never have to compromise on taste due to dietary requirements,” says Abigail Nelson-Ehoff, head of marketing and innovation at Glebe Farm Foods. “Our products meet the highest standards of flavour and quality while being totally free from allergens. All our products are also four times purer than the European standard for gluten-free, making our oats the cleanest in the UK.”

The PureOaty promise

One in three³ UK households now purchase dairy alternatives, with nearly half (48%) of all plant-based milk purchased last year being of the oat variety. “However, out of those oat milks, there’s a reason that PureOaty stands out from the crowd,” she says.

“As well as being 100% pure, our oats are grown on British farms, and processed in Cambridgeshire. PureOaty is also the only Coeliac UK-certified gluten-free oat drink on UK shelves, making it the stand-out choice for coeliacs and gluten-intolerant shoppers. Naturally sweet and creamy, PureOaty is ideal for cereals, smoothies, and barista-quality coffee and is made of only four natural



“Naturally sweet and creamy PureOaty is ideal for cereals, smoothies and barista-quality coffee and is made from only four natural ingredients: British oats, water, sunflower oil and salt”

ingredients: British oats, water, sunflower oil and salt. It contains no concentrate, syrups, or gums – staying true to the purity of locally farmed oats.

“Beyond our Creamy & Enriched and Barista oat drinks, our PureOaty range extends across the breakfast table with oat-based cereals, including PureOaty Granola in three delicious flavours – Choco Chip, Maple & Banana, and Strawberry. The perfect balance between health and taste, these provide ‘permissible indulgence’ for gluten-avoiders. The Strawberry and Maple & Banana recipes are also non-HFSS, and all flavours are Vegan Society-certified.”

An ideal partner

Glebe Farm Foods’ industry-leading credentials can help retailer partners meet their sustainability goals, notes Nelson-Ehoff. “While 91% of dairy milk is produced in Britain⁴, more than 80% of oat drinks are imported. By sourcing our oats from within 70 miles of our farm and investing in a new on-site packaging facility, we have reduced our food miles from grain to pack, and our carbon footprint to 0.29kg per litre, the lowest of any oat drink in the UK.

“We can also produce 10,000 litres of oat drink an hour, making fully sterile packs for 12-month ambient storage in both 1L and 500ml Tetra Paks, offering an efficient solution for both branded and private-label customers.”



Source

^{1,2} Coeliac UK, The gluten-free diet: how much does it cost and why does it matter?, March 2023
³ Nielsen Homescan 52 w/e 17.06.23, June 2023
⁴ Dairy market and self-sufficiency webinar, AHDB, December 2020
⁵ IRI All Outlets 52 w/e 13.08.22

PUREOATY 100% GLUTEN FREE QUALOATY



THE PUREST BRITISH OATS
GO INTO OUR AWARD-WINNING
OAT DRINKS AND CEREALS

Here at Glebe Farm Foods, we're committed to the quality and purity of our gluten free British oats. The entire process from our fields, to our farm, to our food manufacture is dedicated to producing great tasting oat products, guaranteeing total oat purity 4x purer than the European gluten free standard*. Only PureOaty oat drinks are Coeliac UK certified and just like our porridge, granola, oats and flours, they go from oat grain to pack in just 150 meters – keeping our quality high and food miles low.



THE ONLY OAT DRINK CERTIFIED
GLUTEN FREE BY COELIAC UK**

STOCK UP NOW
OFFICE@GLEBEFARMFOODS.CO.UK
WWW.GLEBEFARMFOODS.CO.UK

*Tested to less than 5ppm vs the European standard for gluten free of 20ppm (parts per million glutenous grain to oats).
**PureOaty is currently the only oat milk brand certified by Coeliac UK to carry the Crossed Grain trademark.



GLEBE FARM 
IT'S HOW WE DO THINGS.

Myco Holdings

Hooba: the new name in town

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KEY BRANDS

Hooba

➔ Hooba is a mouthwatering range of plant-based protein products created by the experts at Myco Foods. “Having been lovingly grown and manufactured inside our UK production site, Hooba is ready for market,” says Myco CEO David Wood. “Our exciting range of burgers, mince, and sausages launches at the end of April.”

Created from oyster mushrooms farmed vertically inside Myco’s UK HQ, they are transformed into Hooba under that same roof – all with the addition of just five locally sourced ingredients and a sprinkle of seasoning, he reveals.

“There’s fewer food miles, no over-processing, no soy or gluten,” he says. “As for sustainability, our UK-first production unit was created specifically to cut carbon and save our habitats, so Myco can genuinely lay claim to making Britain’s greenest burger.”

Ahead of the summer – which means bangers, burgers and BBQs – Myco’s range will thrill and fill your customers,



“Our range of mushroom-based burgers, mince and sausages launches at the end of April”

he adds. “There’s more. For years, plant-based products haven’t quite cut it when it comes to texture. Therefore, with Hooba, we’ve put a lot of effort into replicating the mouthfeel of meat.

“Consumers will love Hooba’s texture, as proved when it recently beat several major brands in a blind taste test*. So, stock up for the summer with Hooba, as helping Planet Earth just got tastier.”

* Blind, unprompted taste test completed at the company’s site in North Yorkshire, attended by 80 industry guests, who taste-tested a range of plant-based market leaders alongside Hooba. Products were scored on taste, texture/mouthfeel, aroma and overall, with Hooba coming out on top.

Britain’s Greenest Burger

There is a new name in town... **Hooba**

Available in both food service & retail formats!

Why Hooba?

5 ingredients + seasoning

Soy free + Gluten free

Not over processed

Vertically farmed in the UK

+44 (0)1325 625250
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Oddlygood®

The UK's fresh face of oat drinks

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KEY BRANDS

Salted Caramel Barista Oat Drink
Vanilla Barista Oat Drink
Barista Oat Drink
Dreamy Lemon Dessert
Dreamy Berries Dessert
Dreamy Caramel Dessert
Dreamy Gingerbread Dessert

↘ The UK plant-based drinks market has become increasingly competitive. How can it reset with consumers? Plant-based brand, Oddlygood, is well placed to lead the charge, combining quality, taste, new flavours and plenty of Finnish flair, says global CMO Nina Gillsvik.

Oddlygood builds on the dairy expertise of its founding company, Valio (Finland's leading dairy brand), to answer the growing demand for high-quality, taste-led plant-based products. It has just made its first major UK retail debut in plant-based drinks, launching its Salted Caramel and Vanilla flavoured Barista Oat Drinks into Asda. These will be followed by its original Barista Oat Drink in June. The products offer superior taste and functionality – key market purchase drivers, says Gillsvik.

“The UK is thirsty for fresh thinking in plant-based drinks. We create interesting products and flavours that



“Oddlygood products offer superior taste and functionality – key purchase drivers”

are great in their own right – not just alternatives to milk – and can introduce new customers to the category.”

A seven-figure marketing investment across 2024 will drive brand awareness and trial.

Confident its Nordic success can help it thrive in the UK, Oddlygood aims to re-ignite shopper interest and raise the standard of plant-based food and drink.

CELEBRATE ALL THINGS ODD AND TRY

ODDLY-GOOD



Rude Health

Deliciously dairy-free brand pioneer

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KEY BRANDS

Rude Health
– milk alternatives,
cereals and snacks

With the rise of barista drinks in the dairy alternatives category, food & drink pioneer Rude Health is raising the bar and has launched a new dairy-free drink – Organic Oat Barista. On a mission to make healthy choices a celebration not a sacrifice, the brand prides itself on being ‘deliciously dairy free’ and focuses on flavour first, reveals co-founder Camilla Barnard.

“Four years in the making, Organic Oat Barista is the perfect partner for the coffee connoisseur, whether it’s pods, espresso or filter,” she says. “Organic Oat Barista achieves a perfect creamy foam while using only four natural ingredients – spring water, organic oats, organic cold-pressed sunflower oil and sea salt. With this carefully curated clean deck, the brand’s high oat content (14%) offers a natural sweetness that balances beautifully with coffee.

“There is still a significant opportunity for growth,” adds Barnard. “Consumers are looking for



“Organic Oat Barista boasts a carefully curated clean deck alongside optimum functionality”

functionality, brilliant taste and clean-deck, organic ingredients. It’s a huge challenge to deliver a barista product that ticks all of these boxes. Our years of dairy-free experience have enabled us to unlock this.”

The brand is supporting its growth with five bursts of outdoor media across the year, on over 4,000 sites and reaching over 500 million impressions.



BARISTA BUT BETTER

NEW



**4 NATURAL
INGREDIENTS**

**PERFECT FROTH
NO SPLITTING**



THIS™

Bullish performance for meat-free brand

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- THIS™ Isn't Streaky Bacon
- THIS™ Isn't Pork Sausages
- THIS™ Isn't Beef Burgers
- THIS™ Isn't Mince
- THIS™ Isn't Chicken Pieces
- THIS™ Isn't Lamb Kebabs
- THIS™ Isn't Roast Chicken & Stuffing
- THIS™ Isn't Chicken Shawarma

Sources ^{1,2} IRI Temple, Total Grocery (Chilled Meat Free) 13 w/e 18.02.24; ³ as ^{1,2} except 12 w/e 24.12.23; ⁴ Kantar, Fresh Meat Free (Analogue), Total Market, Repeat Rate 52 w/e 03.09.23; ⁵ Yonder Brand Tracking, Nov '23 summary

While plant-based sales have declined over the past year, THIS has defied the trend, experiencing 47% revenue growth in 2023 and gaining a 2.1% market share over the year to February 2024¹. THIS is now the UK's largest independently owned meat-free brand and third-largest in the category².

Quality and innovation have been instrumental to brand growth, says commercial director Jack Rutherford. "With a mission to transform eating habits for the benefit of the planet and animals, we address the primary consumer concern of taste perception by offering delicious products to break through negative stereotypes," he notes.

"We've launched loads of fantastic products, from our THIS Isn't Roast Chicken & Stuffing to our THIS Isn't Chicken Shawarma. Our Roast became the highest value ROS product in the entire plant-based category in Q4 2023³. Also, our plant-based Beef Burgers and Chicken Pieces were upgraded to make



“Our mission is to transform eating habits for the benefit of the planet and animals”

them even tastier, while our best-selling THIS Isn't Pork Sausages featured in a TV ad featuring food royalty Grace Dent. "Brand loyalty is evident, with 46% of customers repurchasing within a year⁴ and a net promoter score (NPS) of 87%⁵ – significantly higher than our meat-free competitors. This underscores our commitment to delivering high-quality products and maintaining a distinct brand identity."

THIS™ HAS GROWN LOADS (BY 47%, TO BE EXACT)

100% PLANT-BASED



The Compleat Food Group

Plant-based feel good food

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KEY BRANDS

Squeaky Bean
Vadasz
Wall's
Pork Farms
Wrights
Unearthed
Palace Culture

➔ The Compleat Food Group's focus on consumer-led innovation and its insight-driven approach are creating excitement and growth in its categories through high-quality, great-tasting food that people love to eat, says Yvonne Adam, chief marketing officer at the company. "Nowhere is this more evident than in plant-based, where our brands are outperforming the wider category¹, at a time when many consumers are switching back to cheaper meat-based products in the face of the cost-of-living crisis," she says.

Brand performance

"Our hero plant-based brand, Squeaky Bean, is growing ahead of the category at +10% in the last 12 weeks² as it continues to disrupt through its focus on first-to-market innovation, while never compromising on taste and texture," she adds. "An example of this is its recently introduced Beechwood Smoked Salmon Style Slices, the first vegan smoked salmon-style slices in major retailers. Smoked naturally to create a subtle flavour and authentic aroma, they have the same marbled appearance as a traditional smoked salmon and have won multiple accolades, including most innovative product and best fish/seafood alternative at the Vegan Living Awards."

As the No.1 in ready to eat plant-based pieces³, Squeaky Bean creates plant-based food that is loved by vegans, vegetarians and flexitarians alike, including its best-selling NYC Pastrami Style Slices, notes Adam. "An upcoming advertising campaign, 'Dare to Compare', will dial up its taste credentials and demonstrate that its plant-based products are just as tasty as their meat equivalents," she says.

"With its plant-based cheese range, our latest acquisition, Palace Culture, also aims to change perceptions. Despite a strong consumer appetite, many brands have failed to replicate dairy cheese's taste and texture. Palace Culture is changing the game with its Great Taste award-winning Kimcheeze and Mouldy Goaty, which use a base of organic cashews and almonds combined with a blend of herbs and



“In plant-based, our brands are outperforming the wider category”



spices to create flavour-packed products that taste even better than real cheese.”

Great taste

In plant-based, consumers want to buy products they know they can rely on⁴, notes Adam. "Well-known, trusted brands Pork Farms and Wall's Pastry have met this demand, driving +24% growth in their plant-based products over the last year⁵," she reveals. "This has been supported by a redevelopment of Wall's No.1 vegan roll to create a filling that perfectly matches the succulent texture of pork sausage meat. Also, a raft of new listings has seen Pork Farms' Vegan Porkless Pie become the category's No.1 vegan pork pie⁶.

"Beyond meat alternatives, Vadasz is pioneering a completely new category – chilled pickles & kimchi – tapping into a growing demand for gut-healthy, veg-packed products. These include its market-leading chilled Kimchi⁷ and Jalapeño Relish, helping consumers to add a delicious healthy twist to a variety of meals."

With a mission to make food to feel good, The Compleat Food Group will continue to drive the category with its innovative, delicious brands.

Source

¹⁺² Kantar/Circana to 18.02.24
³ Circana to 18.02.24
⁴ IGD Health, Nutrition, Ethics tracker Jan 24
⁵ See 1+2
⁶ Circana to 18.02.24
⁷ See 1+2

PLANT POWER

NO.1 IN
PLANT BASED
READY TO EAT
PIECES*

NO.1 BRANDED
PLANT BASED
PORK PIE**

NO.1 PLANT BASED
SAUSAGE ROLL BRAND***



LEADING PREMIUM
PLANT BASED CHEEZE

THE UK'S NO.1
KIMCHI BRAND

THE
COMPLEATFOOD
GROUP

Follow us on LinkedIn Visit us at www.compleatfood.com

SOURCE: *CIRCANA 52 W/E 24TH FEB 24 **KANTAR LAST 12 WEEKS TO 17TH MARCH 24 ***IRI MARKETPLACE 52WE 18TH FEB 24

GO

BIG



**STOCK UP ON
OUR NEW 2L
BIG PACK**



STRENGTH COMES FROM WITHIN