

27 MARCH 2021

The Grocer Guide to...

The  
**Grocer**

# Free from & plant based





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Poore & Nemecek (2018), Science.  
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## Analysis

# Rapid evolution



**Both the free-from and plant-based markets are continuing to enjoy steady growth as consumers focus increasingly on personal and planet health. And NPD in the sector is rife as suppliers seek to satisfy this burgeoning demand**



As this article is being written, the UK Government is conducting its 10-yearly census and the level of detail it now requests from its loyal citizens is quite amazing.

Apart from the usual questions about numbers of people in the household, age, religion, qualifications etc, the census discreetly asks (admittedly, answering is optional) about sexual preferences.

So it's kind of surprising that they haven't used the opportunity to throw in a question or two about dietary preferences along the way, particularly given the level of attention lavished on obesity, HFSS etc. So, you can be heterosexual or transgender, living in a mansion or a caravan and have a degree in arts or nuclear science, for example, but whether you are a meat-eater, flexitarian, pescatarian, vegetarian,

vegan or simply avoiding certain foodstuffs for health reasons is clearly not considered to be at the same level of importance to the powers in Whitehall... or actually, South Wales, where the Office for National Statistics, which is gathering the information, is based.

That said, government interference in the UK food and drink industry – including recent demands for reformulation and the taxation imposed to boot – is pretty unwelcome in many food and drink manufacturing quarters. Indeed, the industry is now waiting with bated breath for the next phase of Henry Dimbleby's National Food Strategy, which, it is believed, will call for a “radical overhaul” of the UK's food and drink system, following his recent presentation to the Food & Drink Sector Council<sup>1</sup>.

Yet, the answers to such a question in

the national census would have proven quite informative about the current level of interest in vegetarianism and veganism, for example, and could have given both government and the food industry an unparalleled insight into the nation's views on the whole subject of free-from and plant-based eating – an area of undoubted growth and development.

### Sector performance

Whether for environmental, ethical or health reasons, the free-from and plant-based categories, while still relatively small compared to their traditional counterparts, are in full ascendancy – and, at present, suppliers in the two categories feel there is huge potential for future development.

“Plant-based eating is definitely not a trend, it's now a way of life,” says David



# £307m+

The value of the chilled meat-free category<sup>2</sup>

Nielsen Scantrack

# 41%

Projected growth in the free-from market over the next five years<sup>8</sup>

Mintel, February 2020

# £47.7m

Sales of vegan 'cheeze'<sup>13</sup>

Kantar

# £335m

Value of the plant-based dairy alternatives market<sup>18</sup>

Kantar

Knibbs, co-founder and managing director of The Tofoo Co. "Sales of chilled meat-free have seen incredible growth, now valued at over £307m, up 35% year-on-year (YOY)<sup>2</sup>, adding an additional £79m in the last 12 months<sup>2</sup>, but there is still huge potential and massive growth to come.

"Household penetration levels of chilled meat-free are still relatively low compared to many FMCG categories, at just 27%<sup>3</sup>, and as more people choose to adopt more plant-based meals into their weekly schedule, this figure will continue to grow. This is even more profound in the tofu category, where penetration levels are less than 7%<sup>3</sup>, and if we can convince those shopping meat-free to buy an additional tofu product, the opportunity for the category is huge."

Despite the pandemic, meat-free and

plant-based growth has outperformed expectations as shoppers look for more sustainable and healthy options, says Emma Westerman, head of category at Symington's. "The market has been forecast to increase by 35% from 2019 to 2024<sup>4</sup>, which we believe is a conservative estimate based on the current sales performance."

The growth in plant-based, she points out, is largely driven by flexitarians as opposed to vegans and, "with more and more consumers seeking to reduce their meat intake, rather than trying to replace it, we do not see a reason for this growth to stall in the mid term".

Mighty Pea co-founder Nick Watkins points out that, compared to the dairy and meat industries, the free-from and plant-based sectors are "still very much in their infancy, so the potential for growth in these areas has never been

stronger, with both the dairy-free and meat-free categories having doubled in size over the past five years<sup>5</sup>, and retailers such as Tesco pledging to increase sales of meat alternatives by 300% by 2025. Shoppers continue to vote with their feet and make healthier, more environmentally informed and sustainable choices."

Perhaps the greatest validation of the importance of the meat-free or plant-based sector is the involvement by major food and drink brands, in certain cases offering the option alongside their regular brand. Birds Eye, with its long heritage in frozen foods, and Kerry Foods, with its major sausage brand Richmond, are cases in point.

Sarah Koppens, marketing director at Birds Eye, says: "Diets are evolving and people either want to eat foods with lower carbon footprints or reduce

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their meat intake for health reasons. Recent research has shown the impact the pandemic has had on the appeal of veganism, with this diet proving attractive to over one in ten (12%) of all Brits<sup>6</sup>. This year, Veganuary matched the Covid sales peak in March 2020 with £23.1m in sales, attracted the highest number of shoppers yet, with +15% of households buying a frozen meat-free product, contributing to 9% growth in sales<sup>7</sup>. It's therefore apparent that shopper demand for plant-based products is not going to stop any time soon.

"Recognised and trusted brands will continue to play an important role in adding incremental sales and extending the appeal of the category going forwards," adds Westerman. She says that, since launching in 2019, the company's Green Cuisine plant-based products have resonated well with shoppers and brought new consumers into the category. However, she notes that "keeping the category looking and feeling fresh must be a priority to maintain the pace of growth" and, as such, innovation will be key.

Victoria Southern, marketing and category director at Kerry Foods notes the value of the plant-based sector is now at "a whopping £543.5m"<sup>8</sup>, but agrees growth has been driven by flexitarians. "When launching our Richmond Meat-Free Sausages, we used our expertise of the sausage category to introduce a meat-free sausage that mimicked its pork counterpart, right down to the crispy skin fans love."

She believes the firm's Meat-Free Sausages have introduced "a significant 347,975 new shoppers to the category over the last year"<sup>9</sup> and says, "This demonstrates how retailers can use the Richmond brand name and taste credentials to attract and retain even more shoppers and continue to grow the category."

Unlocking the full potential of the plant-based market really comes down to suppliers, brands and retailers working together to educate consumers on the benefits of a more plant-based diet, says Jack Read, UK sales manager at Future Farm. "We believe the free-from and plant-based market will more than double in size over the next five years through sustainable growth. The potential is huge," he says.



However, he, along with many other suppliers, highlights two key barriers to growth – the consumer perception of taste and likeness to meat.

Jess Lalor, marketing manager at Fancy Plants also picks up on this point. "Today's consumer is a no-compromise consumer," she says. "To encourage consumers to make the switch out of dairy and meat and into plant-based options, we have to make it easy and overcome the traditional barriers of plant-based eating, which we see as taste, health and price.

"Delivering on a great-tasting product is essential," she adds. "There cannot be a sense of missing out versus the dairy or meat equivalent or you won't get repeat purchases. Products that deliver on that taste indulgence but have health halos, such as added nutritional benefits and have obvious proof points of how they use their business as a force for good can become habitual smart snack options. Lastly,

plant-based options need to have a relative price point compared to their meat or dairy equivalent."

The impact of the Covid-19 pandemic has led to some softening of the plant-based market, due to the reduction of on-the-go occasions as well as other factors.

Tom Lindley, head of plant-based food firm Cauldron, points to the fact that during the most restricted lockdown periods, some flexitarian consumers "reduced their plant-based spend, as they sought comfort and indulgence during challenging times – and the category growth rate reduced as a result". However, he says, now that the UK's roadmap out of lockdown has been announced, he expects the category to once again see strong growth rates to match previous spring and summer uplifts. "Health considerations will come back to the fore, which is a key driver for plant-based purchases. There is already a

# Indulgence and permissible treats

Northern Bloc co-founder and director Josh Lee says the role occasional indulgence plays in consumers' overall health and wellbeing shouldn't be underestimated during these Covid-19-afflicted times. "Ice cream holds a special place in people's hearts. It's nostalgic, a shared experience and that holistic self-care is more important than ever," he says.

To cater to this, the company has extended its offer with a new vegan mini tub collection – a pack of four chocolate pots in two tubs each of two new flavours, Vegan Chocolate and Honeycomb and Vegan Chocolate Stracciatella, which it says is the only product of its kind on the market at the moment. These will be available in

Waitrose from the end of March.

Nia Salisbury, head of marketing at Wholebake subsidiary 9Brand, says its self-love campaign to promote its new range of plant protein chocolate-coated balls earlier this year "resonated with our consumers in this current climate". With "more indulgent flavours, such as choc brownie and hazelnut praline", the line is positioned as a permissible treat and "delivers key health benefits for consumers, such as protein and fibre... while also meeting the emotional need states of a truly delicious chocolatey snack", she says.

"Enjoyment is the largest driver of snacking and the free-from category has come a long way over recent years with improvements

to taste and texture," adds Salisbury. "We are focusing on bringing some innovative flavours to market over the next year to keep pace with the confectionery category. The recent resurgence of desserts over lockdown has given us plenty of inspiration."

Also earlier this year, Fancy Plants launched Silky Pot, a range of indulgent plant-based puddings available in chocolate and chocolate salted caramel flavours, reveals marketing manager Jess Lalor. "Named after its smooth as silk texture, Silky Pot makes eating plant-based delicious while every pot contains prebiotic fibre, which helps support digestive health," she says.

Moo Free CEO Andrea Jessop says: "Consumers

are seeking out treats and little luxuries to make them feel good and that can also be enjoyed as part of a healthy balanced diet." The company offers a selection of free-from chocolate bars, ranging across a variety of flavours from cinder toffee to mint, strawberry, orange and salted caramel.

Last year, Moo Free launched white chocolate, made from UTZ/Rainforest Alliance cocoa and also offers more experimental flavours in its premium organic bars range, such as sea salt & lime and sour cherry. "Seasonal occasions like Easter also offer the chance for retailers to be more experimental, it says. Its Easter egg range includes a Bunny Comb Easter Egg, using vegan honeycomb and an Organic Sour Cherry Easter Egg.

significantly increased buzz around plant-based eating across social media channels, showing a clear indication of what's to come."

## Free from

With health and lifestyle the main category drivers in the free-from sector, growth over the next decade seems assured. "Mintel projections estimate that the total free-from market will grow by 41% over the next five years<sup>10</sup>," says bread and bakery company Warburtons. "So by 2024, the market is expected to be over three times the size it was in 2014<sup>10</sup>. Within this, the free from bakery sector has grown by over 60% in the last five years<sup>11</sup> and we expect this growth will continue."

That said, it notes, innovation is hugely important in the free-from market. "Consumer demands and tastes are constantly changing as they seek new, different and high-quality products to add to their baskets. Free-from shoppers

are also searching for normality and products that reflect the traditional, core bakery offering. Our range at Warburtons Gluten Free has grown over recent years to include traditional breads, to crumpets, sandwich thins and our new rolls, coming soon in 2021. Gluten-free rolls are a significant part of free-from bakery, accounting for 16.3% of total volume<sup>11</sup>, yet there has been little genuine innovation in the area over recent years, contributing to sector decline. Therefore, the launch of our Super Soft Sliced Square Rolls and 4 Soft Sliced Brioche Rolls will bring something new and exciting to the market."

Gluten-free specialist Schär points to the "untapped opportunity yet to stick in free from is the in-store bakery", where it says "managing supply, demand and safety is key for an expandable sub-sector".

"Within free from, gluten-free will continue its long-term upward trend,

with a 6% forecast for 2021," says Schär. "This is slightly subdued as the pandemic caused a boost in March 2020 that will have to be annualised, while the major sub-sector of gluten-free cereal bars proved less popular as the 'stay at home' message caused single 'on-the-go' bars to decline. However, the market continues to be driven by a relatively small number of very heavy shoppers who enjoy the ever-improving taste delivered by the market."

"Prior to the pandemic, bars with gluten-free and vegan claims were seeing double-digit growth," notes Nia Salisbury, head of marketing at Wholebake subsidiary 9Brand. "While the total category has contracted over the last year, value share of products with a gluten-free claim are holding steady at around 40% and products with vegan claims at 16%<sup>12</sup>. Due to the nature of the cereal bar category being a carried-out consumption or on-the-go impulse purchase, lockdown

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restrictions have negatively impacted the category over the last year.” However, she adds that the company expects the total cereal bar category to return to growth this year, although “recovery to 2019 levels will be slower – Nielsen predicts this won’t happen until 2022<sup>13</sup>”.

Warburtons highlights the further opportunity in gluten-free, citing Coeliac UK’s estimate that one in 100 people are affected by coeliac disease, but only 30% who have the condition have been diagnosed. “This means there are currently half a million people who have coeliac disease, but don’t yet know,” notes the company.

### Dairy free

Dairy alternatives are powering free from’s growth, according to a recent article in The Grocer<sup>14</sup>, with the overall category up by £358.3m in value.

Northern Bloc co-founder and director Josh Lee, says the plant milk market is growing five times faster than its dairy milk counterpart<sup>15</sup>. “And we expect this trend to translate into the ice cream category this year,” he says.

“2020 saw sales of vegan ‘cheeze’ hit £47.7m<sup>16</sup>, but there is still plenty of room for growth,” says Norseland senior brand manager Lisa Harrison. “Data from Kantar shows that sales of vegan cheese have grown by 45%<sup>16</sup>. Sales of Applewood Vegan alone increased by 70.2%<sup>16</sup>. With many people working from home at the moment, cooking every meal from scratch, convenience is key, so grated and sliced formats of cheese have been in demand, which prompted us to extend our vegan range with the launch of Applewood Vegan Grated and Mexicana Vegan Slices.”

These have already gained traction, says Harrison, with Mexicana Vegan Slices, launched in January, gaining listings in 482 Sainsbury’s and 200 Waitrose stores and Applewood Vegan Grated being introduced shortly after in 480 Tesco stores across the UK.

Many vegans, says Harrison have found it difficult to find a vegan ‘cheeze’ that has the same meltability factor as dairy cheese and the company has focused on this, therefore, in its product development. Its two new launches will be followed up by three more this year, “so 2021 is looking good already”, says the company.



At Arla Foods, Jörd spokesperson Lily Robinson says: “We can currently see the penetration of plant-based dairy alternatives is 47.5%<sup>17</sup> and this shows there is further room for growth within the category. Plant-based dairy alts are currently worth £335m and growing by 24% YOY<sup>18</sup>.” Meanwhile Arla forecasts a 30%+ rise in the category over the next five years. “New trends will continue to emerge and NPD across smaller plant-based categories, such as cheese, cream and beverages will continue to be developed and improved.”

Robinson notes that Jörd’s Oat flavour variant has seen the strongest growth over the past two years, rising from £7.8m to £51m and says that “oat has recently overtaken almond to become the number one fresh plant-based variant within dairy drinks”.

### Meat free

Forty-three per cent of Brits have chosen to reduce their meat

consumption out of concern for health, environmental or animal rights reasons<sup>19</sup>, says Richard Peake, managing director at Merchant Gourmet. Notably, there is compelling evidence that more people are consuming less meat and following either plant-based or flexitarian diets. “If everyone in the UK replaced just one more red meat meal per week with a plant-based dish, it would reduce the UK’s greenhouse gas emissions by 50 million tonnes – the same as taking 16 million cars off the road<sup>20</sup>.”

Kerry Foods’ Southern makes the point that flexitarians, opting to moderate and reduce their meat consumption are in the driving seat when it comes to the growth of the plant-based sector. “Our Meat-Free range has proven hugely popular since launch, with our Meat-Free Sausages not only becoming the number one best-selling SKU in the total meat-free category, but also the third best-selling sausage in the

# Category drivers

There is pretty much universal agreement among suppliers about the key category drivers boosting the gluten-free and plant-based markets.

“Health will continue to be the key driver within plant-based, as shoppers across all demographics increasingly recognise the health benefits of reducing their meat intake,” says Tom Lindley, head of Cauldron. “Climate change is the next biggest driver and is growing in importance for many, particularly among younger shoppers. We must make changes now to safeguard the future of our planet and retailers have a real opportunity to be part of the solution by stocking trusted and sustainable plant-based brands.”

“The global food

system has to change and we need to normalise eating more sustainably, beyond veganism and vegetarianism,” says Michael Hunter, UK managing director at Meatless Farm. “While health remains the biggest driver, we’ll see sustainability and environmental concerns come to the forefront this year more than ever before, 2021 is a tipping point for the climate change agenda, as carbon-conscious consumption will become the norm for those with the option to choose products that fit a carbon budget, as much as a health and financial budget. Status-fluid meat-reducers will be the real mass-market game-changer.”

Fresh research from Merchant Gourmet

showed that 36% of the UK considered going vegan for Veganuary alone, with health (68%) and the environment (54%) cited as the two main motivating factors, reveals managing director Richard Peake.

Celebrities will have an influence, notes Norseland senior brand manager Lisa Harrison, as they turn to plant-based diets for lifestyle, to lessen their carbon footprint and do their bit to save the planet. This, she says, will keep plant-based foods in the public eye.

Environment is the primary driver of plant-based eating, health is a key benefit for those consumers and ethics will help consumers navigate their choice, says The Tofoo Co founder and managing director David Knibbs.

Companies will need strong ethical and sustainable credentials to survive in the long term.

“Three big drivers must work in tandem to maximise the growth of the plant-based category: price, taste and education,” says Jack Read, UK sales manager at Future Farm. “There is a price premium associated with plant-based diets. As the market grows it will be amazing to see the price gap to meat gradually close, making the category more accessible for all. Taste is #2 on the purchase decision hierarchy and will be the main factor for a consumer to make a repeat purchase. Finally, education and mass awareness will continue to be very important to opening consumers’ eyes to plant-based diets.”

total sausage category<sup>21</sup>.” Last year the company expanded beyond its sausage remit for the first time with the launch of its Meat-Free Burger.

Innovation is at the heart of meat-free, says Meatless Farm UK managing director Michael Hunter. “The ability to innovate and drive the adoption of meat-free will be driven by an increased efficiency of ingredients and production. The category is young and next-generation meat-alternative brands are still building supply chains that the meat industry has had decades to optimise.”

The company recently switched the recipe for its plant-based burgers and sausages to use pea protein only “to create an even meatier taste and texture”. “We’ve recently introduced hot dogs, sausage patties and sausage rolls, which are testament to the growing number of consumer eating occasions,” says Hunter. “We see an opportunity for every meat product to

have a meat alternative option.”

With its own in-house test kitchen, food development chef and lab, Hunter says: “The development of new products that answer a number of consumer occasions is a focus for us this year. We will be developing our frozen portfolio and strategy, working closely with retailers to ensure we provide a frozen range that complements the chilled products.”

## Ingredients development

In terms of the ingredients used to create plant-based foods, tofu and textured vegetable protein (soy meat) still dominate the global market, accounting for around 80% of products<sup>22</sup>, but many other ingredients are establishing themselves as NPD in the marketplace is rife.

In the UK, seitan, which only accounted for 4% of the UK’s meat alternative market in 2019<sup>23</sup>, is the fastest-growing, according to The Vegan Society, but

other ingredients such as pea protein are gaining traction.

“A number of our Green Cuisine products use pea and wheat protein as core ingredients,” says Birds Eye’s Koppens. “Both are extremely versatile sources of plant protein, that can be used in different ways to achieve a variety of texture or appearances. This versatility lends itself to being able to create a range of different meat substitutes that imitate the texture of – and provide similar levels of protein to – beef, pork or chicken.”

Pea protein is a relatively new innovation within the FMCG industry, she notes. “So we’re continually developing our renovation plans to ensure we take advantage of its fantastic qualities. The nutritional benefits of our pea protein products help consumers easily boost their fibre and iron intakes. A Birds Eye Green Cuisine burger provides over a quarter (29%) of an adult’s intake for iron.”

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Future Farm's Read agrees that "pea as an ingredient has a strong nutritional profile to develop into a significant contributor in the market". "We believe soy will always be the main ingredient used in the category. However, consumers will be more demanding about the quality and traceability of the soy produced. At Future Farm, we only use non-GMO soy and only work with Brazilian farmers who don't use lands deforested from the Amazon Rainforest (since 2006).

Putting pea protein to the test is Mighty Pea. "The recent release of our new Mighty Pea Protein Oat M.lk is a real game changer," says Watkins. "Having landed in Tesco and Sainsbury's at the end of January 2021, the brand is a first-to-market new product launch. Other oat milks contain very little protein, which means they are missing an essential nutritional building block for growth and development. All Mighty Pea products contain the same amount of protein as dairy milk and are fortified with 50% more calcium vs dairy, as well as vitamins D, B12 and iodine."

However, some believe that certain proteins can deliver a slight after taste – "particularly pea", notes Naughty Vegan commercial manager Kevin Newey. "So we use a number of ingredients to mask off notes and allow the seasoning to shine through. The world of yeast extracts is equally exciting. We have access to so many variations that can deliver a wide range of flavour profiles, it keeps our NPD constantly on the move."

Symington's Westerman believes ingredients that combine key trends are potentially the most interesting. "For example, high-protein leguminous crops, such as chickpeas, lentils and yellow-split peas are not only a source of plant-based protein but also have sustainability credentials – i.e. their ability to fix nitrogen levels, improving soil health – with a positive impact on both human and planetary health."

In recent research, she says, the company found 78% of consumers were motivated by a claim of high fibre and protein. "With this in mind, we have developed Blooming Good Food Co products with ingredients such as lentils and sweet potatoes."

The other motivator, she notes, are ingredients that have secondary



healthy benefits. "Ingredients, such as ashwagandha and hemp oil, associated with stress relief, have seen significant growth, as well as sweet potatoes, associated with brain health."

"The inclusion of hemp in food and drink is a trend we expect will continue to grow," adds Arla Foods' Robinson. "Notably, we are quietly optimistic about our own recent launch of Jörd Oat and Hemp Oat Drink."

Covid-19 has put health into focus across a lot of categories, with shoppers seeking out products to help boost their immune system or aid gut health, says 9Brand's Salisbury. However she notes that 67%<sup>24</sup> of consumers prefer to get their nutrients naturally rather than in fortified food, so the company is relaunching its range in April with nine key health benefits, including immune boosting and gut health, from natural ingredients in the bars, which are all a minimum of 50% seeds and include real fruit and nuts.

### Merchandising

Hitherto, the tendency in major retailers has been to group free-from product or plant-based products together in their own sections, but pressure is growing to site plant-based items, in particular, alongside other products in the main meat and dairy aisles.

"There are definitely different schools of thought on where plant-based products are positioned in-store – in a separate area or within respective categories," says Arla Foods' Robinson. "Given the age of the category and how quickly it is growing, that is only natural. We see merit in both, but ultimately, the most important element is ease for the shopper and, given the growth of the category, it is important that plant-based is given the space it fairly deserves, regardless of store size."

"It is no longer enough to have one plant-based fixture, but rather retailers need to continue to expand their plant-based bays to help navigate

# Packing in the protein

“We know from our research that the first port of call when consumers make a decision to eat less meat, is the meat-free category,” says The Tofoo Co founder and MD David Knibbs. “They first seek a direct replacement to be the centrepiece of a dish, such as a sausage or burger. Once they have more confidence, they will then look for other options, such as ingredients like Tofoo.”

He notes the company became the first tofu brand to launch into frozen in December 2020 with its Crispy Original Chunkies. “And we have a strong pipeline in place for 2021 that will include another first for tofu,” he reveals.

“We’ve deliberately developed formats that play off recognisable products that shoppers love and

enjoy,” says Birds Eye marketing director Sarah Koppens. “Our most recent launch has taken the iconic chicken dipper, arguably one of the nation’s most loved teatime foods, and recreated a plant-based version, using wheat protein. With 39.4% of UK households enjoying our chicken products<sup>i</sup>, we’re in the unique position to craft meat-free versions that meet shopper demand for plant-based alternatives that are reflective of the products they are swapping out of their diet.”

As well as its Green Cuisine chicken-free range, the company added its first fully vegan meat-free sausage roll under the label last summer and plans to launch some additional free-from NPD to its Goodfella’s pizza brand

later this year.

“Having worked on quite a bit of vegan NPD, there’s some way to go to get the vegan cheese analogue equivalent to the meat analogue,” says Naughty Vegan commercial manager Kevin Newey. “We are seeing more and more cheese manufacturers moving to plant-based. It’s a natural transition and the expertise in development from dairy will deliver results in the plant-based sector.”

At Violife, UK & Ireland country manager Simon Orchard says the company is pushing the boundaries of the free-from and plant-based cheese category through new flavours and formats. “With outside dining and BBQ foods and flavours likely to be a major trend this year, Violife has

launched its new Smoky Cheddar flavour slices. This is the first vegan alternative to cheese to use round slices and is infused with a hickory-smoked rind.”

Merchant Gourmet managing director Richard Peake notes that the company’s pulses and grains are “packed with protein”, adding, “Plant-based proteins are still a big trend with consumers as more innovative flavour combinations come to our shelves.”

Merchant Gourmet’s latest addition to its portfolio is its Spicy Cajun-Style Lentils and Red Kidney Beans, which Peake says “packs a punch” and is “aimed at strengthening the brand’s position in the plant-based category”. The new product is available from Waitrose and Ocado.

shoppers across the repertoire of fresh, frozen and snacking meat-free options,” comments Kerry Foods’ Southern. “One way retailers can do so is by clear signposting in the meat aisle to highlight the alternative plant-based options also available – driving shoppers to the plant-based fixture. Here, retailers can also use recipe inspiration to demonstrate to shoppers how meat-free sausages and burgers can be swapped into shoppers’ favourite meals.”

“Most consumers of free-from and plant-based products are choosing to do so as a lifestyle choice rather than for dietary needs,” says 9Brand’s Salisbury. “Within the cereals bar category, 61% of SKUs are gluten-free, growing from 58% in 2019<sup>25</sup>. Similarly 41% of bars are vegan-friendly vs 36% in 2019<sup>25</sup>. So, a lot of products in the main fixture are already meeting free-from consumer needs. Bringing everything together and segmenting

within the parent category instead of a dedicated free-from area, will open up more variety for consumers and encourage more shoppers to expand their repertoire and trial the free-from offering. This will also go some way to overcoming the outdated perception that free-from products have inferior taste. Many shoppers already eating free-from bars are completely unaware, as they really deliver on taste.”

Others, such as Schär, however, believe the separate plant-based bays in-store “help the shopper to easily find what they want within this sector, making it much easier to shop and giving the potential of adding more to the basket, perhaps making the move from just ‘meat-free Monday’ to ‘day 2 Tuesday’ etc”.

Moo Free CEO Andrea Jessop agrees that, “to help the customer journey”, it is better to separate out the free-from and plant-based products. “As an active free-from shopper, it can often

be confusing when vegan products containing gluten and traces of milk are added alongside the free-from section,” she says.

“We don’t see there being a ‘one size fits all’ approach to plant-based merchandising,” says Cauldron’s Lindley. “We expect that there will be a continued presence in three key areas: ready meals, fresh meat aisles and frozen. As more brands start to introduce vegan options, we will start seeing more categories with dedicated plant-based space on fixtures, such as cakes, condiments and dairy. This will help retailers drive sales in two ways, by encouraging plant-based shoppers to explore the full store and influencing flexitarian shoppers to purchase more plant-based, both leading to an increase in basket items and spend.”

“For ease of shopping, we believe plant-based products should be planogrammed together as a sub-category in their relevant aisle – for

## Analysis

example in dairy yoghurts, there should be a section of plant-based yoghurts,” says Fancy Plants’ Lalor. “This way flexitarians can be inspired to choose plant-based products while browsing the regular aisles, but also there is a destination for plant-based products, to which retailers and brands can direct people.”

Meatless Farm’s Hunter makes the point that the free-from and plant-based categories are delivering against very different consumer needs, with free-from driven by a need for certain products that ensure they avoid allergies or intolerances, while plant-based diets – whether vegan or flexitarian – are “a conscious decision to remove or reduce animal products driven by a desire to improve health, make a positive impact on the environment or general animal welfare concerns”. With meat-free “now a credible protein choice for all”, he feels this category should be positioned as such, with its own defined area in-store alongside other protein choices”. Similarly, he says, plant-based dairy should be positioned next to its dairy counterparts.

Future Farm’s Read says: “We could see some free-from and plant-based products sited alongside their relative product, particularly in the meat alternatives category. Imagine going into a supermarket and seeing a beef burger sited with a plant-based burger. That will be a very exciting day.”

In summary, many believe a combination of a separate free-from or plant-based area and siting these goods alongside their alternatives is the best of both worlds. “Consumers respond well to clearly zoned areas – we like familiarity and knowing where we are going,” says Naughty Vegan’s Newey.

“A combination of both would work well,” adds Norseland’s Harrison.

“Free-from should have a designated area in stores, but with some popular free-from products close to the original versions of the products, that will tempt more shoppers who may not be familiar with the free-from section to look at plant-based options of their favourites. Dual siting of products would help to get more flexitarians trying plant-based.”

Symington’s Westerman reckons the trend where mainstream brands have variants within their core range

## Future opportunities

Given the rapid development of the free from and plant-based categories, where do suppliers believe future opportunities lie?

Symington’s head of category Emma Westerman says store cupboard foods have “huge potential for innovation in plant-based as products are still fairly limited compared to the chilled and frozen categories”. She also notes the classic products, such as the chocolate digestive should have a vegan alternative.

Naughty Vegan commercial manager Kevin Newey cites plenty of growth potential in the desserts sector of the vegan-friendly market. “There has been a clear boom in plant-based ice creams, but desserts



are a little thin on the ground.”

“There has to be huge opportunity for categories that still rely heavily on meat at the heart of their offer, such as the pet food category,” says The Tofoo Co’s co-founder and MD David Knibbs. “Pet owners adopting a flexitarian approach to their diet will no doubt want to be able to do the same for their pets.”

Mighty Pea co-founder Nick Watkins says the baby and toddler category has “a huge opportunity to deliver incredible growth for plant-based nutrition”.

Finally, Simon Orchard, UK & Ireland country manager at Violife, has a teasing answer: “There is huge untapped opportunity in plant-based snacks. Watch this space for new news.”

as part of the main fixture, has already started. “Arguably there is a role for both, with free-from and plant-based options within the fixture more likely to appeal to lifestyle and flexitarians as a simple swap from their usual purchase,” she says.

“As and when plant-based becomes more popular, we believe the natural place will be within the main fixture. Until that point, a separate bay enables consumers with specific diets in mind to find a range of products.”

Simon Orchard, UK & Ireland country manager at Violife agrees: “It is important for there to be specific sections for free-from products, particularly for those who suffer from allergies and need to ensure that the products they are selecting are safe for them to eat.

“However, to really capitalise on this enormous growth opportunity, we believe the future is for a clearly labelled vegan/free-from section in

the parent category. Positioning these products alongside one another will educate consumers on the wide variety of product options available to them and encourage more consumers to make the switch to a plant-based/flexitarian diet.”

### Sources

- <sup>1</sup> The Grocer, <https://tinyurl.com/y2xekn6d>
- <sup>2</sup> Nielsen Scantrack, w/e 30.01.21
- <sup>3</sup> Nielsen Homescan, w/e 31.10.20
- <sup>4</sup> Data provided by Symington's
- <sup>5</sup> Kantar, 52 weeks 2020 vs 2016
- <sup>6</sup> Mintel, <https://tinyurl.com/34vv2dak>
- <sup>7</sup> Kantar, rolling w/e 24.01.21, Penetration, Total Meat Subs, excluding pizza and meals
- <sup>8</sup> IRI data, excludes discounters, ending 27.12.20
- <sup>9</sup> Kantar, Fresh Meat Sausage Penetration, w/e 24.04.20
- <sup>10</sup> Mintel, Free From Report, February 2020
- <sup>11</sup> Nielsen IQ, RMS data, Free From Bakery, UK Total Coverage, incl. discounters, Value Sales, 12 months ending 30.01.21
- <sup>12</sup> Nielsen, 52 w/e 12.12.21
- <sup>13</sup> Nielsen Scantrack, FSA analysis, 16.01.21
- <sup>14</sup> The Grocer, <https://tinyurl.com/yv5cbbdx>
- <sup>15</sup> Kantar Worldpanel, FMCG, 52 w/e 04.10.20
- <sup>16</sup> Kantar Worldpanel, 52 w/e 27.12.20
- <sup>17</sup> Kantar, 52 w/e 24.01.21
- <sup>18</sup> Kantar, 52 w/e 30.01.21
- <sup>19</sup> Independent, April 2020, <https://bit.ly/3qHuoJ6>
- <sup>20</sup> Sustainability Voices, February 2021, <https://bit.ly/2Owg289>
- <sup>21</sup> IRI Value Sales, 12 weeks to 24.01.21
- <sup>22</sup> <https://tinyurl.com/4f9j9mxv>
- <sup>23</sup> The Vegan Society, <https://tinyurl.com/2ezfthk5>
- <sup>24</sup> Mintel, Attitudes Towards Healthy Eating, February 2020
- <sup>25</sup> Nielsen, 52 w/e 12.12.20

### Packing in the protein

<sup>1</sup> Kantar, WPO, 52 w/e 26.01.20

## Arla Foods

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### KEY CONTACTS

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Spokesperson, JÖRD

### KEY BRANDS

JÖRD

➔ In September 2020, Arla entered into the plant-based category with the launch of Jörd, a range of organic oat drinks made from natural ingredients, currently available in three flavours: oat, oat & barley and oat & hemp.

“As a result of the pandemic it’s clear that understanding what’s in their food and making good choices is important for consumers, says the company. As Jörd is made only from four simple ingredients<sup>1</sup>, the range is perfectly placed to meet this consumer need.”

Exclusively launched in Sainsbury’s, the brand has seen high levels of repeat purchase, also bringing new shoppers into the category. This has led to further listings and Jörd will now be sold in Asda, Ocado, Co-op and Amazon Fresh.

Lily Robinson, Jörd spokesperson, says: “The launch has been incredibly successful, with Jörd’s unique selling points bringing something new to the category. We have supported the brand with a number of mechanics to drive



“Jörd’s unique selling points bring something new to the category”

trial with shoppers, including stand-out packaging and in-store marketing.”

Made in Denmark with oats grown by Nordic farmers, Jörd is aimed at people who want flexible food choices, adds Robinson. “The future looks really exciting for Jörd. We’re exploring new opportunities for the brand, will invest in more marketing campaigns and roll out to even more retailers,” she says.

### Source

<sup>1</sup> Oat drink contains only water, oats, rapeseed oil and salt

# FROM NORDIC NATURE TO YOUR FRIDGE

Introducing JÖRD – the all new, plant-based oat drink, made from all natural ingredients.

We keep things simple: we only use organically grown oats, harvested by Nordic farmers to give a fresh and pure taste.

All natural, all plant-based, all delicious.

**ALL NEW · ALL NATURAL · ALL PLANT-BASED ·  
ALL NORDIC · ALL ORGANIC · ALL DELICIOUS**



Freshness of oat with a nutty elegance from hemp.

Pure and fresh oat flavour.

Freshness of oat sweetened with barley.

## Birds Eye

# Hot sales in frozen meat-free

## DETAILS

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w: [goodfellaspizzas.com/our-range/pizzas](http://goodfellaspizzas.com/our-range/pizzas)

## KEY CONTACTS

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Birds Eye  
**Claire Hoyle**  
Head of Marketing,  
Goodfella's

## KEY BRANDS

**Birds Eye**  
**Goodfella's**

Health remains high on the agenda for many consumers, with shoppers increasingly conscious of their diets and wellbeing. Research has shown that the pandemic has had a distinct impact on the appeal of veganism, proving attractive to 12% of all Brits<sup>1</sup>, and the demand for plant-based products boomed at the start of 2021.

Sarah Koppens, marketing director, Birds Eye, says: "Shopper demand for plant-based products accelerated during Veganuary, which saw £23.1m in sales<sup>2</sup>, matching the Covid sales peak in March 2020. The category also attracted the highest number of shoppers yet, with a rise of 15% in households buying a frozen meat-free product<sup>3</sup>, contributing to 9% growth in sales<sup>4</sup>.

"Our Green Cuisine range also felt the benefits of Veganuary, significantly outperforming the meat-free category with growth of 111.9%<sup>5</sup>. With penetration up 8.3%<sup>6</sup>, the range has captured more than its fair share of new category entrants, and emphasises the sales opportunity available to retailers."

## Making plant-based mainstream

Birds Eye's heritage in frozen and its trust among families has helped bring in shoppers who might not have considered a meat substitute before, she says. To continue attracting new shoppers into the category, Birds Eye's NPD pipeline has focused on developing formats that play off recognisable products that shoppers already love.

Koppens continues: "With 39.4% of UK households enjoying our chicken products<sup>7</sup>, we're in the unique position to craft meat-free versions that meet shopper demand for plant-based alternatives. Our latest Green Cuisine



“The demand for plant-based products boomed at the start of 2021, with Veganuary seeing £23.1m in sales<sup>2</sup>. Our Green Cuisine range also felt the benefits of Veganuary, significantly outperforming the meat-free category with growth of 111.9%<sup>5</sup>”

launch, the Chicken-free Chicken Dipper, has successfully recreated one of the nation's most-loved teatime foods in meat-free form, and was named 2021 Product of the Year. Exciting NPD launches are crucial in attracting new shoppers to the frozen aisle."

## Frozen free-from growth

The frozen free-from category is another important growth area, as consumers increasingly demand products that cater to their dietary requirements and preferences.

Claire Hoyle, head of marketing for Goodfella's, comments: "Throughout the pandemic, shoppers have turned to the frozen aisle for gluten-free alternatives of their favourite foods, that have a greater shelf-life and also generate much less wastage than fresh products. The free-from pizza segment is now worth £14m and is in growth by 42% over the last two years<sup>8</sup>, so we can expect this demand to stay for the long-term.

"Our Goodfella's Free From range continues to play a big role in driving the free-from pizza segment, with growth of 45.1% over the same time period<sup>9</sup>, featuring the two most valuable branded free-from SKUs in the dietary market and with a 39.8% share of the sector<sup>10</sup>. We also plan to launch some additional free-from from NPD later this year – so, watch this space."



## Source

- <sup>1</sup> Mintel, <https://tinyurl.com/34vv2dak>
- <sup>2-3-4</sup> Kantar, rolling 4 w/e 24.01.21 – Penetration – Total Meat Subs excl. Pizza and meals
- <sup>5</sup> Nielsen Scantrack, 4 w/e 30.01.21
- <sup>6</sup> Kantar, WPO 21.02.21
- <sup>7</sup> Kantar, WPO, 52 w/e 26.01.20
- <sup>8</sup> Nielsen, data up to w/e 05.09.20, Total Coverage
- <sup>9</sup> Nielsen Scantrack, 52 w/e 30.01.21
- <sup>10</sup> Nielsen Scantrack, w/e 30.01.21 MAT TY, Excludes vegan/meat-free category



100% TASTY

0% CHICKEN

VEGANUARY WINNERS!  
+57% GROWTH<sup>1</sup> AND +15% PENETRATION<sup>2</sup>



<sup>1</sup>Nielsen Value Sales, Total coverage, 4 Weeks ending 30.01.2021 (vs. previous period)

<sup>2</sup>Kantar - rolling 4w/e 24th Jan 2021 – Penetration – Total Meat Subs excl. Pizza and meals

\*Winner Free-From Foods Category. Survey 9,865 people by Kantar.

## Califia Farms

# Building tasty milk alternatives

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### KEY PRODUCTS

**Almond Drink**  
**Oat Barista Blend**  
**Vanilla Oat Drink**  
**Original Iced Coffee with Oat**

### Source

- <sup>1</sup> IRI, MAT to 27.12.20, Value Sales, Total Market  
<sup>2</sup> Kantar Worldpanel, 4 w/e 24.01.21  
<sup>3</sup> SPINS & The Good Food Institute, 2021

➔ The plant-based sector rose to new heights last year, with plant-based milk alternatives seeing growth of 32%<sup>1</sup>. Helping to drive this continued rise is Los Angeles-based Califia Farms. With growth accelerating at over 50% in 2020, the brand has moved to being the third-largest<sup>1</sup> in the category, offering consumers the opportunity to replace dairy with plant-based alternatives, without compromise, it says.

Following the success of the brand's flavoured Almond Drink variants and Oat Barista Blend in the UK, Califia is launching two new products in the market: Vanilla Oat Drink and Original Iced Coffee with Oat. "Our innovative flavours are key to attracting additional consumers to the category, as well as delighting existing consumers," says Daisy Swiers, UK country manager at Califia Farms. "We are encouraging shoppers in the UK to 'Demand More from Your Oat', with products that deliver on taste and nutrition."



“We are encouraging shoppers in the UK to ‘Demand More from Your Oat’”

This Veganuary, one in four shoppers bought into plant-based dairy, driving penetration in the category<sup>2</sup>, she says. However, there is still plenty of room for growth. "We continuously draw inspiration from the US market, where category penetration is at 14% share of milk, versus 9.7% in the UK<sup>3</sup>. We have exciting plans for the brand globally to tap into these opportunities."



**CALIFIA**  
FARMS®

# Demand More from Your Oat

## Love Raw

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**Manav Thapar**  
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CEO

### KEY BRANDS

**Love Raw Butter Cups**  
**Love Raw Cre&m filled wafer**  
**Love Raw M:lk chocolate bars**

### Source

<sup>1</sup> <https://www.about.sainsburys.co.uk/-/media/Files/S/Sainsburys/pdf-downloads/future-of-food-08.pdf>

<sup>2</sup> IRI MarketPlace: Total UK, Value Sales, Actual Value Growth, 52 w/e 14.06.20

Despite a challenging 2020, vegan chocolate brand Love Raw grew its turnover by 59% and continues to push forward with creating a range of “world-first” vegan chocolate products, it says. “With consumers more focused on health and adopting a plant-based lifestyle, Love Raw’s brand positioning of ‘chocolate first, vegan second’ hits the right note with those who want to ‘be a bit more vegan’ without compromising on taste,” says co-founder Rimi Thapar.

“With flexitarians set to make up 50% and vegans and vegetarians a further 25% of the British population by 2025<sup>1</sup>, there is a huge opportunity to produce vegan chocolate that tastes like traditional chocolate. Love Raw is one of the fastest-growing vegan brands in the impulse channel<sup>2</sup> and, with its eye-catching packaging and product range, it is an exciting time for the business.”

Founded in 2013, Love Raw produces a range of vegan chocolate, including Butter Cups and Bars. In 2020, it



“Love Raw’s brand positioning of ‘chocolate first, vegan second’ hits the right note”

launched a “world-first” vegan Cre&m-filled wafer. “Launching online during the pandemic was a risk, but the wafer bar exceeded all expectations,” says Thapar. “With multiple retail listings, supported by in-store POS and online campaigns, Love Raw is growing its brand awareness rapidly. In 2021, we have more exciting NPD – including another world-first. Watch this space.”

# Love Raw®

# VEGAN CHOCOLATE

THAT TASTES LIKE CHOCOLATE CHOCOLATE



**CHOCOLATE BUTTER CUPS**  
AVAILABLE IN 5 FLAVOURS

**CREAM® WAFER BARS**  
AVAILABLE IN 2 FLAVOURS

**M:LK® CHOC BARS**  
AVAILABLE IN 3 FLAVOURS



FOR MORE INFORMATION, CONTACT: [SALES@EATLOVERAW.COM](mailto:SALES@EATLOVERAW.COM)

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## Cauldron Foods

# Innovation to drive growth

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## KEY CONTACTS

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Head of Cauldron  
**Andrea Harburn**  
Brand Manager

## KEY PRODUCTS

**Vegan Middle Eastern Falafels (200g)**  
**Vegan Moroccan Falafels (180g)**  
**Vegan Organic Tofu Block (396g)**  
**Vegan Organic Marinated Tofu Pieces (160g)**  
**Vegan Organic Teriyaki Pieces (160g)**  
**Vegetarian Lincolnshire Sausages (276g)**  
**Vegetarian Cumberland Sausages (276g)**

## New for April 2021:

– Pressed Tofu with Italian Herbs & Tomato (250g)  
Tandoori Bites (200g)

## New for April 2021 – dairy-free category:

– Greek Style Cubes in Mediterranean Herbs (250g)

➡ Cauldron, the UK's No. 1 plant-based brand in chilled meat free<sup>1</sup>, is continuing to help retailers inspire shoppers to make positive plant-based changes with its delicious range of products, says the company.

“Hot on the heels of our sponsorship of the most successful Veganuary to date, Cauldron is launching a raft of exciting plant-based NPD, supported with a £3m brand investment, which will help retailers drive plant-based and free-from sales,” it reveals.

The launch of the brand's Greek Style Cubes in Mediterranean Herbs (250g, RRP: £2.50), available in Waitrose from April and Sainsbury's from May, will see it enter a new category.

“After another huge Veganuary, with more than 580,000 people taking the pledge, there has never been a better time for retailers to look at boosting their plant-based sales throughout the year, across all categories, and innovative NPD is a key driver,” says Tom Lindley, head of Cauldron. “Our Greek Style Cubes are a first for the brand in the dairy-free category; the savoury and crumbly cubes are infused with the unmistakable flavours of basil and oregano and have the added benefits of being better for you and better for our planet.”

Cauldron is also extending its shopper-favourite tofu and snacking range with a Pressed Tofu with Italian Herbs & Tomato (250g, RRP: £2), which is easy to use and will encourage more consumers to try cooking with tofu, as well as Tandoori Bites (200g, RRP £2.25), which are bringing exciting flavours to the snack category, it says.

“Since the start of the UK's first lockdown last year, more and more consumers have been cooking at home and one in five people have reduced



“There has never been a better time for retailers to look at boosting their plant-based sales throughout the year, and NPD is a key driver”

their meat consumption during the Covid-19 pandemic<sup>2</sup>,” adds Lindley. “This has led to a significant rise in ingredients such as tofu, which has seen a 57% increase in sales YoY<sup>1</sup>. The versatility of Cauldron products means they are perfect for creating quick and delicious plant-based dishes.”

The Cauldron Pressed Tofu with Italian Herbs & Tomato launching first in Waitrose from May, is the first flavour innovation of its kind in the UK, taking tofu usage beyond the usual dishes such as stir fry or curry and into a new world of pastas and salads – dishes consumed in the warmer months.

Cauldron's new Tandoori Bites will also launch in Waitrose from May and offer a quick snack or a tasty addition to Indian-style wraps and salads, it says. The bites are packed with curry and chilli spices and contain sweet potato, kale, red pepper and carrot, balanced with the sweetness of coconut.

“Cauldron's partnership with Veganuary 2021 gave the brand an even bigger platform to show people just how amazing plant-based dishes can be,” says Lindley. “We are encouraging retailers to stock the new Cauldron products alongside existing shopper favourites, such as Cauldron Organic Tofu and Falafels, as these will continue to drive shoppers to the category.”



## Source

<sup>1</sup> IRI, 52 w/e 30.01.21

<sup>2</sup> The Vegan Society

# NEW

## PLANT BASED PRODUCTS

2

DAIRY FREE SALAD TOPPER

### GREEK-STYLE CUBES



1

PROTEIN FOR PASTA

### PRESSED TOFU with ITALIAN HERBS



3

THE PERFECT SIDE

### TANDOORI BITES



FROM

# Cauldron™

## THE NO.1 PLANT BASED BRAND IN CHILLED MEAT FREE\*

Find out more about our 2021 launches:  
[customer.services@cauldronfoods.co.uk](mailto:customer.services@cauldronfoods.co.uk)

\*IRI 52 w/e £Sales 31.01.2021

## Deliciously Ella

# The ultimate vegan chocolate

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**Georgina Pattison**  
Commercial Director

## KEY BRANDS

**Deliciously Ella Creamy**  
**Vegan Chocolate Bars**

Deliciously Ella has expanded its existing portfolio of plant-based food products with a new range of creamy vegan chocolate bars. “Our two new recipes – roasted almonds, hazelnuts, blackcurrants & raspberries; and roasted & salted almonds, hazelnuts & cashews – are 100% plant-based, wrapped in 100% recyclable packaging, and our chocolate is made with just five simple ingredients,” says Matthew Mills, CEO of Deliciously Ella.

“Our creamy vegan chocolate bars meet the needs of plant-based shoppers who are seeking the highest-quality products for more indulgent, social and gifting occasions.”

The focus at Deliciously Ella is predominantly about making plant-based cooking as easy as possible, adds Ella Mills, founder and brand director. “So much of what we do focuses on simple lunches and dinners; savoury recipes that help you fill each day with delicious goodness. That said, we believe indulgent snacks are key to a well-rounded, enjoyable, and sustainable way of eating.

“Vegan chocolate has come a really long way since I went plant-based almost 10 years ago and first tried it,” she notes. “I’ve struggled, however, to find any that I really love, either because they contain emulsifiers or they have an overly coconut flavour to compensate for not using milk.

“For the past two years, we’ve been working to create the ultimate vegan chocolate bar, using completely natural ingredients. Matt went to Northern Italy in 2018 to source the right machinery to make it and we’ve been testing recipes ever since. Chocolate is incredibly complicated to make, and we do the entire process in our factory in the UK, from milling the cacao nibs, mixing it, tempering, then hand-finishing each bar. We are proud of our Deliciously Ella chocolate, it’s so creamy and delicious, and made with just five ingredients.”

Matthew comments: “More shoppers are seeking premium products for indulgent moments at home. Despite premium and giftable NPD driving growth in main aisle chocolate, there hasn’t a been huge amount of diverse



“For the past two years, we’ve been working to create the ultimate vegan chocolate bar”

innovation in plant-based chocolate. With consumers seeking out chocolate for indulgent moments<sup>1</sup> and prioritising taste<sup>2</sup>, we set out to create the ultimate vegan chocolate bar that could truly exceed consumer expectations.

“As a plant-based food and wellness platform, our ambition at Deliciously Ella is to share delicious ways to feel better, and to encourage more people to eat more plant-based foods. Extending our range to include chocolate bars is an exciting step in bringing delicious, multi-category innovation to meet the underserved needs of plant-based shoppers. We will continue to support them by focusing on high-quality, great-tasting innovation in 2021 and beyond.”

The two creamy vegan chocolate bars are the first piece of NPD it has launched in its brand new 100% recyclable packaging, as well as its updated brand identity, introduced earlier this year. The bars are available in Whole Foods Market and in the Waitrose free-from aisle, as well as Deliciously Ella’s web shop.

## Source

- <sup>1</sup> Mintel, <https://reports.mintel.com/display/988760/>  
<sup>2</sup> Mintel, <https://tinyurl.com/vkwp9yu>

new

deliciously  
ella<sup>de</sup>

roasted almonds, hazelnuts,  
blackcurrants & raspberries  
in smooth vegan chocolate



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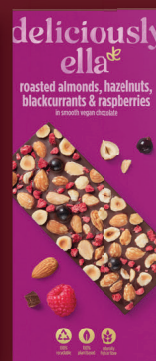


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gluten  
free

Dr Schär UK

# Strength in gluten free

## DETAILS

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## KEY CONTACTS

**Bradley Grimshaw**  
Managing Director  
**Alicia White**  
Head of Marketing  
**Steve Cookson**  
Head of Sales

## KEY BRANDS

**Wholesome Seeded**  
**Wholesome White**  
**Ciabatta Brown**  
**Ciabatta White**  
**Crispbread**  
**Pretzels**  
**Jaffa Cakes**  
**Margherita Pizza**  
**Melto**

➡ Schär began producing gluten-free foods for its consumers nearly 40 years ago and continues today as experts in researching, developing and distributing high-quality products for special nutritional needs.

With a portfolio of around 120 SKUs, including bread, pizza, sweet and savoury snacks and flour to name a few, Schär is always focused on developing innovative products to offer its gluten-free consumers worldwide.

This dedication has resulted in growth of 14.1% year on year<sup>1</sup>, outperforming the market growth of 5.8% and driving Schär to No.1 brand status in October 2020. Managing director Bradley Grimshaw comments: “As the global leader and pioneer in gluten free, it has been a long-term goal to reach No.1 status in the UK market since launching the brand in 2015 – achieved through a combination of strong innovation, high-quality products and a data-driven approach to understanding the consumer better.”

## Super Sandwich launch

In response to consumer demands, October last year saw the launch of Super Sandwich, offering gluten-free consumers a bigger bread slice in line with mainstream products. In addition, Schär launched the indulgent, creamy hazelnut Noccioli Wafer biscuit, allowing consumers to enjoy the ‘coffee shop’ experience at home, along with a seasonal range, including traditional European Christmas products Lebkuchen and Spekulatius, and a limited-edition Raspberry Jaffa Cake.

The range also contains products suitable for vegans, as communicated with a digital and influencer campaign during Veganuary, resulting in strong



“We are continuing to invest in a digital strategy, supporting our bakery and snacks range, to further strengthen our position within the gluten-free market”

performance from its White and Brown Ciabatta rolls, notes Schär head of marketing Alicia White. Vegan-friendly attributes will continue to be a consideration in the company’s innovation plans, while 2021 will also see further focus on new recipes for Schär’s hero range of Wholesome loaves.

“Following our strong performance online, we are continuing to invest in a digital strategy, supporting our bakery and snacks range to further strengthen our position within the gluten-free market,” adds White.

Schär’s continued focus is to support those who have not yet been diagnosed with a gluten-related disorder. Research suggests there are just 30% of coeliacs diagnosed in the UK<sup>2</sup>, meaning there are still many people suffering symptoms which can be relieved by a gluten-free diet.

“Our easy-to-use online symptom checker is the ideal place to start and in-house dedicated dietitians can support healthcare professionals with educational resources.”

## Source

<sup>1</sup> IRI, Top 6 Retailers, 52 w/e 06.02.21

<sup>2</sup> Coeliac UK, <https://www.coeliac.org.uk/information-and-support/coeliac-disease/about-coeliac-disease>

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\*Source: IRI, Top 6 Retailers Total Gluten Free 52 w/e 6th February 2021.

## Fancy Plants

# Glowing salute to Silky Pots

## DETAILS


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## KEY BRANDS

**Fancy Plants Silky Pot™**

 An evolution of The Chia Co, pioneers of introducing chia to the UK, Fancy Plants is the result of years of exploring the potential of plant-based food. Fancy Plants CEO John Foss has one clear goal in mind: “To create delicious plant-based snacks with added nutritional benefits, making it easy for people to eat more plants. The more people we can get to join us on the plant side, the better it is for our health and the health of the planet.”

“Our team of free-thinking plant innovators has brought together the best plant ingredients to make taste buds sing and offer positive nutrition,” he says. “We’ve launched at a time when the dairy-free dessert industry is on the rise, with reports that the global vegan dessert market is expected to grow at a compound annual growth rate (CAGR) of 10.1% from 2020 to 2027.”

The Fancy Plants Silky Pot is a range of chilled plant-based puddings, available in Chocolate and Chocolate Salted Caramel flavours, each pack containing 2 x 80g pots. “They are delicious, with a rich mouthfeel, and contain prebiotic fibre, which helps to support digestive health,” explains Foss. “They can be found in the plant-based section of the convenience aisle at selected Tesco stores and the free-from chilled section of Whole Foods Market stores across the UK.”

Thanks to increasing consumer demand for on-the-go snacking, as well as a booming functional food market<sup>2</sup>, the launch of Fancy Plants Silky Pots in Veganuary 2020 was well-received, achieving positive media coverage in a range of trade and consumer publications, says Jess Lalor, marketing manager, Fancy Plants. “Fancy Plants Silky Pots were included in top plant-based product round-ups from publications such as About Time, Sheer Luxe and Vegan Food and Living. We also targeted a hand-picked selection of Instagram influencers who gave glowing reviews, declaring themselves ‘100% obsessed’ with our plant-based snacks,” she says.

In a bid to reach its key millennial audience, Fancy Plants ran a tongue-in-cheek Valentine’s Day campaign,



**“We’ve launched at a time when the global vegan desserts market is expected to grow at a CAGR of 10.1% from 2020 to 2027”**

called Come to The Plant-Side, to reflect its “playful and provocative” brand personality. “Aware that the nation could do with cheering up during the pandemic, we created dating profiles for six of our plant-based ingredients, each with their own attractive personalities, nutritional benefits and distinct look,” reveals Lalor. “We targeted 20-something female Londoners with the creative on social media, as well as gifting foodie influencers with fancy ‘date night’ packages, matching them with their favourite snack. Again, the Silky Pots went down a treat, with our new fans unable to believe they’re completely plant-based.”

Lalor notes that Fancy Plants is “tickled pink” by the welcome it has had from UK audiences. “We’re excited to continue building brand awareness and uniting plant lovers; we’ll never stop challenging people to think differently about food.”

“We also intend to become a certified B-Corp by the end of 2021, as we want our business to have a positive impact on our employees, communities and the environment,” says Foss. “And we partner with global organisation, 1% for the Planet, with 1% of sales going to support the work of high-impact, not-for-profit social and environmental groups. We believe wholeheartedly that the future is green.”

## Source

<sup>1</sup> Grand View Research, <https://www.grandviewresearch.com/industry-analysis/vegan-dessert-market>

<sup>2</sup> Kerry Taste and Nutrition, <https://www.kerry.com/insights/kerrydigest/2020/plant-based-food-growth>

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## Future Farm UK

# Looking to the Future

## DETAILS

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## KEY BRANDS

Future Burger  
Future Meatballs  
Future Mince  
Future Sausages  
Future Chicken

 Future Farm, Brazil's first revolutionary meatless meat producer, has launched into the UK market. Known in Brazil as Fazenda Futuro, the award-winning brand has set out to "create the future of food and to change the way the world eats meat", it says. To achieve this, the business offers consumers a range of products that it believes can match animal products on flavour, texture and taste, using 100% natural and sustainable ingredients.

Future Farm has a relentless focus on product quality through innovation, it says. "Just like tech products, our meatless foods are in a continual process of testing and improvement. As they 'upgrade', the products continually increase in quality, moving closer to the flavour, texture and juiciness of meat with each iteration."

The company also has a high environmental ambition that's close to its heart: to buy back the Amazon by fostering the movement towards GMO-free and deforestation-free produce. Fighting for biodiversity and against destruction of the rainforest, all of the brand's suppliers have to be members of the Responsible Soy Association.

Since launching its Burger, Meatball, Mince and Sausage products in the UK in January – in Sainsbury's and TheVeganKind Supermarket – the business has been expanding its presence in other channels, including recent launches in key wholesalers. "There is fierce competition in the meat alternatives category and we're really excited by the market potential," says UK sales manager Jack Read. "It's amazing to receive such positive responses from the trade, particularly on the taste and quality of our products."



**"We partner with the communities that share the same values as us. This is the fundamental principle of our brand"**

Future Farm UK has recruited more than 4,000 new social media followers within 10 weeks and reached 20 million consumers in its launch campaign.

Pedro Zuim, European marketing director, says: "We don't like to interrupt people to talk good stuff about ourselves. Rather, we partner with the communities that share the same values as us. This is the fundamental principle of our brand."

The launch of the core range is only the first step on Future Farm's journey. While focusing on upgrading current products, innovation remains a top priority. "Advances in technology give us the tools to develop innovation in new spaces that will set us apart from other brands," explains Marco Leta, founder of Fazenda Futuro. "Some meat categories haven't been replicated well, and we see a huge future in the development of fish alternatives."

Daniel Wanderley, international sales director, says "We've launched into 22 countries worldwide and the UK stands out as one of our best launches yet. There's a huge appetite for high-quality meat alternatives, so we've accelerated our plans and will bring our newly launched Future Chicken innovation to the UK in April. We plan to become the UK's meat alternative brand of choice for trade and consumers alike."



# TASTE THE FUTURE

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10,000,000  
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## Kerry Foods

# Richmond's meat-free move

## DETAILS

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## KEY CONTACTS

**Alexandra Burn**  
 Brand Manager

## KEY BRANDS

**Richmond**  
 – Meat Free Sausages  
 – Meat Free Twinpack Sausages  
 – Meat Free Burgers  
 – Meat Free Frozen Sausages  
 – Meat Free Frozen Burgers

“At Richmond it’s fair to say we know a thing or two about sausages,” says the company. “As the nation’s favourite sausage brand<sup>1</sup> we’ve been making them for more than 100 years and they are synonymous with mealtime occasions that bring friends and families together.

As part of its mission to cater to every family mealtime, Richmond branched into the meat-free category for the first time with the launch of Richmond Meat-Free Sausages. “We know the meat-free market is booming, worth £534m, up 30% compared to 2019<sup>2</sup>,” it says. “But interestingly, the category isn’t being driven by just vegans and vegetarians, but rather flexitarians – those looking to moderate their meat consumption without cutting it out entirely. As a result, these shoppers are looking for plant-based products that do not sacrifice on taste and texture.

“That’s where we come in. We’ve put our deep knowledge and expertise of the sausage category into launching a delicious Meat-Free Sausage that mimics its pork counterpart, right down to the crispy skin we know Richmond fans love. This means shoppers can easily swap it into their favourite recipes.”

## Consumer popularity

Since launch, the company’s Meat-Free Sausages have proven to be a runaway hit with consumers, it notes. “With an RSV of £18.2m<sup>3</sup>, Richmond Meat-Free Sausages is not only the number one best-selling SKU in the meat-free category by ROS<sup>4</sup>, but is also the third-biggest brand in meat-free<sup>5</sup>. In fact, with our pork and meat-free ranges, Richmond now dominates the top



“We’ve put our deep knowledge and expertise of the sausage category into launching a delicious Meat-Free Sausage that mimics its pork counterpart, right down to the crispy skin”

three spots in the sausage category<sup>6</sup>. Importantly, our Meat-Free Sausages introduced a significant 347,975 new shoppers to the category over the past year<sup>7</sup>, demonstrating how retailers can use the Richmond brand name, known and trusted by families, and taste credentials to appeal to even more shoppers and grow the category.

“And we haven’t stopped there,” it adds. “Continuing on our mission to offer a range of products that are staples at mealtimes, last year we launched Richmond Meat-Free Burgers. At 85g a patty, Richmond Meat-Free Burgers are the ideal portion size for those looking for a meat-free option the whole family will enjoy and are mildly seasoned, so kids can enjoy them too. Our Meat-Free Burgers have now become the second best-selling meat-free burger in just six months since launch<sup>8</sup>.

“Both Richmond Meat-Free Sausages and Meat-Free Burgers have proved to be huge sales drivers, not just for Richmond but for the whole meat-free category and we’re committed to creating products that we know shoppers will love and that families trust.

“2021 is set to be another huge year for Richmond as we explore even more exciting innovations in meat-free – so watch this space.”

## Source

<sup>1</sup> IRI MarketPlace, MAT value to 30.12.18

<sup>2</sup> IRI, 52 w/e 01.11.20

<sup>3</sup> IRI, 52 w/e 21.02.21

<sup>4</sup> IRI, 12 w/e 24.01.21

<sup>5</sup> IRI, Value Sales L12wks to 25.02.21

<sup>6</sup> IRI, Value Sales 12wks to 24.01.21

<sup>7</sup> Kantar, Fresh Meat Free Sausage Penetration w/e 24.04.20

<sup>8</sup> IRI, 12 w/e 24.01.21



# #1 SKU IN MEAT FREE\*



- ✓ HIGHEST REPEAT RATE\*\*
- ✓ FASTEST GROWING BRAND THIS VEGANUARY\*
- ✓ #3 SAUSAGE IN TOTAL SAUSAGE\*

\*\*KANTAR & \*IRI, TOTAL MEAT FREE, 4W/E 24TH JAN 2021

## Meatless Farm

# Driving trial in meat-free

## DETAILS

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## KEY CONTACTS

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**Jade Dodds**  
UK Sales Director

## KEY BRANDS

**Meatless Farm**  
– Sausage Patties\*  
– Sausage Roll\*  
– Hot Dogs\*

\* all new

 Meatless Farm is one of the fastest-growing plant-based meat-alternative brands in the UK and has just had a record Veganuary with a 78% sales increase YoY. “We have also recently outperformed the meat-alternatives market in the core burger, mince and sausage categories, and became best-sellers in Sainsbury’s and Morrisons,” says UK managing director Michael Hunter. “During the initial lockdown, our sales more than trebled, driven by an increased demand as consumers look for healthier and more sustainable options.”

“We’re really driving our innovation pipeline to support increased demand and consumer occasions that drive category growth. A core part of this has been ‘co-creating’ products with major high street brands like Leon and Pret A Manger. These partnerships are testament to the mainstream opportunity for plant-based food, also highlighted by the Meatless Meatball Wrap being the first new product in Pret’s history to become a top five best-seller in the first few weeks of launch.”

“Brand partnerships are a good opportunity to show plant-based food prepared at its best and help drive the conversion through to retail purchase,” he adds. “Taste and texture are two of the biggest barriers to consumers eating more plant-based food and the more we can do, as a category, to educate consumers and drive trial the better.”

Meatless Farm has just expanded its sausage range with hot dogs, sausage patties and sausage rolls, which shows the rise in plant-based eating occasions, says Hunter. “Looking forward, we see an opportunity for plant-based proteins to replace 60-70% of the intensively farmed processed meat market.”

Marketing has been core to the



**“The more we can do to educate consumers in and drive trial of plant-based foods, the better”**

company’s strategy on targeting meat-eaters, he adds. “Our M\*\*\* F\*\*\* campaign, launched over the summer, is a great example. We wanted to turn the convention that eating plant-based food is boring on its head by showing that our products are interesting, taste great and are easy to swap to without compromise. One of the biggest challenges for next-generation plant-based alternatives is fighting the legacy perception that meat-free is unexciting and tasteless. We need to break down those barriers and encourage more trial and ultimately repeat purchase.”

Working closely with customers, the company has supported, alongside Morrisons, development of its new Eat Fresh meal boxes. “A major trend has been the rise in home delivery and meal kits. Delivered directly to consumers, the 18 vegan and veggie dishes, created by Meatless Farm chef Ben Davy and the Morrisons team, include a mixture of family favourites and world cuisine.”





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## Merchant Gourmet

# Appetite for Change

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## KEY CONTACTS

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Head of Brand

## KEY BRANDS

**Merchant Gourmet**  
– Puy Lentils  
– Glorious Grains  
– Whole Chestnuts  
– Spicy Cajun-Style Lentils and Red Kidney Beans  
– Smoky Spanish-Style Grains & Rice

With a year-on-year (YOY) growth of 16% and a market share of 39.6%<sup>1</sup>, plant-based food supplier Merchant Gourmet's sales have continued to grow rapidly during the Covid-19 pandemic, as consumers have become increasingly conscious around the health credentials of their food, and concerned about the environmental impact of their shopping choices.

As a result, Merchant Gourmet's new brand mantra, 'An Appetite for Change', has resonated strongly with consumers over the lockdown period, it says.

"People are more engaged than ever and aware of their carbon footprint. Shoppers are open and eager to make a change – whether that's embracing a fully plant-based diet or reducing their meat intake," says Merchant Gourmet managing director Richard Peake.

"Merchant Gourmet stands for plant-based simplicity, providing shoppers with simple products and ingredients that come straight from Mother Nature. Each pouch is simple to prepare and, importantly, is a simple way to help save the planet one great meal at a time."

A retail sales value of over £25m highlights Merchant Gourmet's rapid development and illustrates the level of impact the brand has had in driving valuable category growth, he says.

Not only has Merchant Gourmet's customer base grown, with consumers wanting to try new products, but also the data reveals that these consumers have repeatedly purchased Merchant Gourmet products since – clear evidence of brand loyalty, he notes.

Latest NPD from the brand, launched earlier this year, is its Spicy Cajun-Style Lentils and Red Kidney Beans, available from Waitrose and Ocado (RRP £2). "The pouch is positioned as the perfect plant-based option for those looking to cut out or reduce their meat consumption, whether to make meals more adventurous or bulk out dishes at low cost," explains Peake. "This continues the brand's move towards providing flexible and convenient products that can be used as either an ingredient, a side of plate or centre of plate option. Consumers can expect a flavour explosion, with notes of punchy



**“Shoppers are open and eager to make a change – whether that’s embracing a fully plant-based diet or reducing their meat intake”**

jalapeño, rosemary and smoked paprika with every bite,” he adds.

Merchant Gourmet has significantly increased its marketing spend to help continue to attract more new shoppers and support its huge plans for 2021.

Alongside the company's 'An Appetite for Change' message, launched in January, it revealed a new collaboration with the multi-talented chef and YouTube star Gaz Oakley, to show consumers how simple it is to live a plant-based lifestyle. With his strong plant-based ethos, and over 1.3 million YouTube followers, Oakley will support Merchant Gourmet's mission to help as many shoppers as possible eat less meat and discover the pleasure of simple plant-based food. This will also help amplify the brand story through PR, social media, and shopper marketing activities at retailer level.

In addition, the brand has launched an industry-leading 'Appetite for Change' recycling scheme, and has a 'Plant-Based Simplicity' cookbook coming out in April.

Merchant Gourmet also has plans for an exciting pipeline of NPD in 2021, continuing its move towards complete and centre of plate plant-based alternatives to some of the UK's favourite dishes.



## Source

<sup>1</sup>IRI, 52 w/e 31.01.21

# MORE GREENHOUSE, LESS GASES



*Every meat free meal helps save the planet*

[merchant-gourmet.com](https://merchant-gourmet.com)

## Mighty Pea

# Mighty take on sustainability

## DETAILS

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## KEY CONTACTS

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Co-Founder

**Tom Watkins**

Co-Founders

## KEY BRANDS

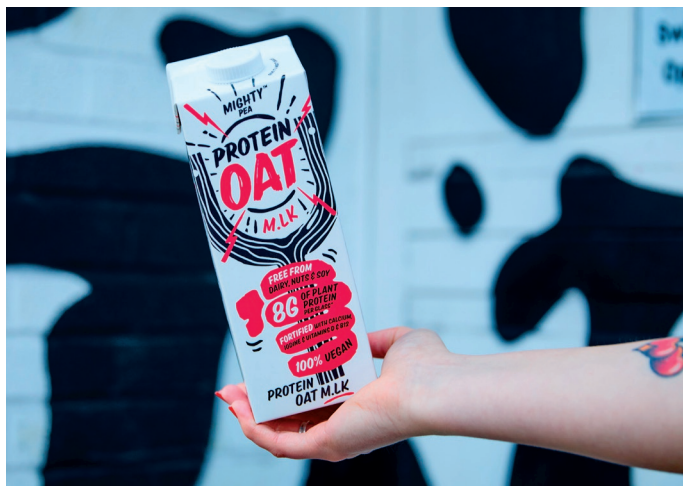
**Mighty Pea M.lk****Mighty Protein Oat M.lk**

Sales of Mighty Pea have skyrocketed in 2020/21, with Veganuary sales up 183% year on year<sup>1</sup>, in no small part due to the increased consumer focus on the importance of health and wellbeing, says the company.

“Covid-19 has had a profound effect on the retail industry and given us all a glimpse of what a world with empty supermarkets shelves looks like. It has also reminded us how important it is to appreciate the people around us, cherish the ones we love and, for many of us, question the decisions we make in terms of what we eat and drink.”

The Mighty Pea M.lk range has seen a huge increase in sales over the last 12 months, it says, as demand for products offering a better, healthier and more ethical alternative to meat and dairy has never been stronger. All Mighty Pea products contain the same amount of protein as dairy milk, are fortified with 50% more calcium, as well as vitamins D, B12 and iodine.

“The need to ‘stay at home’ has also made people appreciate the great outdoors even more, so we’ve been working closely with the remarkable team at insights platform Mondra to measure and quantify the sustainability credentials for all Mighty Pea M.lk products,” it says. “We’ve published all of our independently calculated sustainability scores online at [mondra.com](http://mondra.com). Supporting informed environmental impact decisions and sustainability transparency is so important to us that we’ll also be introducing new Mighty packs in Q2 that have an ‘eco grade’ – including the first-ever on-carton sustainability profile – similar to on-pack nutritional info, but for biodiversity, carbon, water use etc.



“Supporting informed environmental impact decisions and sustainability transparency is important to us”

“New Mighty Pea Protein Oat M.lk (eco grade A) has also just landed in Tesco, Sainsbury’s and Ocado and is fast becoming a star performer in the dairy alternatives category. This first-to-market oat milk V2.0 gives the sector a Mighty upgrade, and, unlike other oat milks, Mighty Pea Protein Oat M.lk contains the same amount of protein as dairy milk as well as twice the calcium.

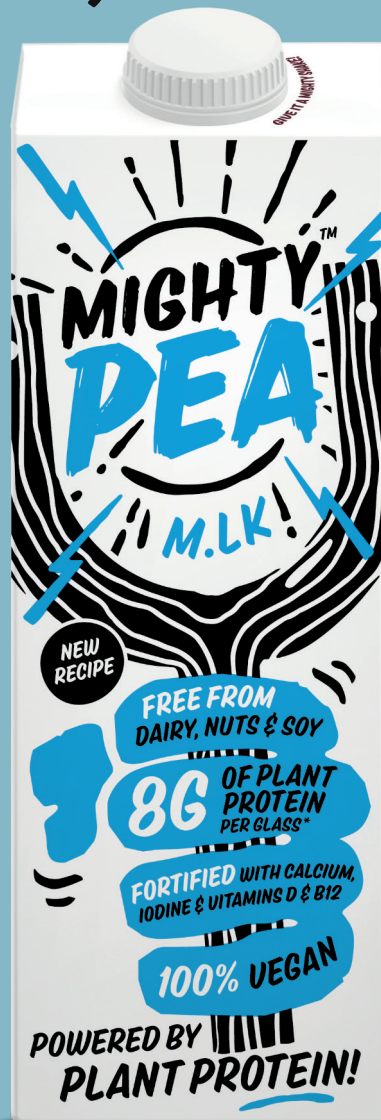
“2021 has also been the first year we’ve introduced a Mighty Pea out-of-home campaign across the UK, with hundreds of billboards nationwide showcasing the Mighty Pea M.lk range. There has been an incredibly high level of engagement and positive feedback to the campaign from across the UK.”

Several new Mighty lines will launch in 2021, including the Mighty Barista line, ready-to-drink Mighty Shakes and an amazing new Mighty Human Vegan Protein and Supergreens range.

“Finally, from all of us at team Mighty, our sincere thanks to all the key workers who’ve kept the nation going through the pandemic – you guys are all heroes.”

## Source

<sup>1</sup> Internal sales data



**PLANT** M.L.K.  
**AT ITS MIGHTIEST**



[MIGHTYPEA.CO.UK](http://MIGHTYPEA.CO.UK)

## DETAILS

## Moo Free

## KEY CONTACTS

## KEY PRODUCTS

### Source

<sup>1</sup> Internal sales data



As a family-run business, whose owners are gluten- and lactose-intolerant, it has always been key for Moo Free to produce accessible, high-quality, great-tasting, ethical free-from and vegan chocolate, and with this comes an exciting flow of NPD, it says.

Last year Moo Free launched its white UTZ/Rainforest Alliance chocolate, which quickly outsold the milk version by a third<sup>1</sup>, becoming its best-selling product. Building on this, Moo Free introduced a white chocolate advent calendar and snowman at Christmas, but its best-selling festive launch was a milk chocolate figure made with Rainforest Alliance cocoa, which generated more than £120,000 in sales.



**“It has always been key for Moo Free to produce ethical free-from and vegan chocolate”**

New flavours were also added to its premium organic bars and its Everyday bars are now offered in a grab-and-go version following customer demand.

The full range experienced a brand refresh, including on its seasonal ranges, such as its latest Choccy Eggplosion Easter Egg and Mini Eggs.

Moo Free's 2021 marketing strategy aims to increase its visibility and purchase frequency, it says, as well as support exciting NPD over the next year.



## Naughty Vegan

# Enjoying Naughty moments

### DETAILS

**Naughty Vegan**  
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### KEY CONTACTS

**Kevin Newey**  
Commercial Manager

### KEY BRANDS

**Naughty Vegan**

Being vegan or simply looking to reduce meat and dairy intake doesn't mean you want to be 100% healthy, 100% of the time.

"At Naughty Vegan, we are all about having an indulgent moment, when you just want to enjoy great-tasting, naughty food without any compromise," says commercial manager Kevin Newey. "Having launched in Morrisons in autumn 2020, Naughty Vegan has gone from strength to strength. Our initial launch range of pastries in the freezer cabinets has got vegan, vegetarian and meat-eaters alike enjoying naughty moments aplenty."

The Warwickshire-based team is focused on developing an affordable range, where flavour comes first, and is now working on more items, including desserts, due to launch through 2021.

"It has been a whirlwind six months," explains Newey. "Our team have worked really hard on a deliciously tasty range, as well as launch and



**"We're all about having an indulgent moment with great-tasting, naughty food"**

promotional activity, throughout the challenging backdrop of the pandemic. We're now looking forward to the rest of 2021, with five additional SKUs coming into the range and several other potential lines moving into 2022.

"The 'naughty' moments we all enjoy as part of our eating has really struck a chord with consumers. Sometimes it's just fun to be a little bit naughty."



available at  
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THE GOOD GROCERS

**Morrisons**  
Since 1899

**SOMETIMES IT'S FUN TO BE A LITTLE BIT NAUGHTY**

[WWW.NAUGHTY-VEGAN.CO.UK](http://WWW.NAUGHTY-VEGAN.CO.UK)

**Naughty Vegan**

Nestlé UK

# Powering up alternatives

## DETAILS

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## KEY CONTACTS

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Senior Brand Manager,  
Nescafé Mixes

## KEY BRANDS

**Nescafé Gold Almond Latte**  
**Nescafé Gold Oat Latte**  
**Nescafé Gold Coconut Latte**

Consumers are increasingly exploring alternative health options and following flexitarian diets, seeking substitutes to animal-based products such as dairy.

Social media has fuelled this trend, bringing it to the mainstream with now one-third<sup>1</sup> of the population buying into dairy alternatives, and with 84%<sup>1</sup> of them doing so for lifestyle choices rather than intolerance, says Nestlé.

The company launched three plant-based frothy coffees in 2019 under its iconic Nescafé Gold brand. The almond, oat and coconut lattes are all certified by the Vegan Society as suitable for people following a vegan diet and carry the sunflower trademark on-pack. "These are blends of Arabica and Robusta coffee that have been specially crafted to mix perfectly with the plant-based ingredients to create smooth, creamy-tasting lattes," says Nestlé.

### Fast growth for alternatives

"The Nescafé Dairy Alternative range is the only plant-based offering in the category and our range has been growing fast, up 363% and now worth over £3m<sup>2</sup>. We are quick to spot and embrace fast-moving coffee trends and tastes in this highly competitive and innovative market.

Our new plant-based vegan latte mixes are the latest in a long list of innovations to bring new and exciting sensory experiences to our loyal Nescafé consumers.

This year, Nescafé has already supported the Dairy Alternative range with an extensive marketing campaign for Veganuary as it is a key time to recruit new consumers. The campaign included a digital and social activation with consumer competitions.

### Wider hot beverages category

Meanwhile, the hot beverages category continues to evolve, with new products and trends emerging.

Lifestyle changes in the category see many shoppers choosing dairy alternatives or buying into decaf to control their caffeine intake, with the introduction of new flavours. These changes help the category to continue



“One-third of the population are now buying into dairy alternatives with 84% of them doing so for lifestyle choices rather than intolerance”

to stay relevant and front-of-mind for shoppers, thereby enabling the hot beverages category to maintain its position in the UK with 97.6% of households buying in each year<sup>3</sup>.

However, it is important to maintain focus on the established Nescafé products in the range as well as these new products. The Nescafé brand accounts for 31.3% of the total spend in hot beverages across the convenience channel<sup>4</sup> and over 40% of this value generated comes from the top five selling products<sup>4</sup>. These five products are different pack formats of Nescafé Original, Nescafé Gold Blend and Nescafé Azera Americano making these must-stock products for any hot beverages range.

Wholesalers can maximise profits by providing a product offering across all the segments of tea and coffee to ensure no sales are lost. Key segments that are growing and should be stocked as part of any hot beverages range include roast & ground coffee, coffee pods and Origins Instant coffee, as well as speciality teas, fruit and herbal teas and green tea<sup>5</sup>.

## Source

- <sup>1</sup> Kantar Worldpanel, Bespoke Study 2020
- <sup>2</sup> IRI, All Outlets and KWP Discounters, 52 w/e 30.01.21
- <sup>3</sup> Kantar, household penetration, 27 December 2020
- <sup>4</sup> IRI, Symbols and Independent Grocers, Top 10 Coffee Products, Value Sales, 52 w/e 02.01.21
- <sup>5</sup> HIM, price-marked packs (PMPs) in convenience stores, November 2019

# DELICIOUS, SMOOTH TASTE WITHOUT THE DAIRY



TRY OUR

# dairy alternative

LATTES



\*Winner Dairy Alternatives Category.  
Survey of 10,601 people by Kantar

## Norseland

# Dairy firm ramps up alternatives

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### KEY CONTACTS

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Head of Marketing and NPD

### KEY BRANDS

**Applewood® Vegan**  
**Mexicana® Vegan**  
**Ilchester® Vegan**

2021 looks set to be Norseland's busiest plant-based year to date, as it launches five new vegan products.

Following the success of Applewood Vegan block and slices and Mexicana Vegan last year, Norseland has now introduced Mexicana Vegan Slices in Sainsbury's and Waitrose, followed by Applewood Vegan Grated in Tesco.

The robust sales of the Ilchester Vegan Festive Selection – “the most talked about vegan cheese board in 2020”<sup>1</sup> – which featured two new vegan cheeses, the Ilchester Melting Mature Block and the Ilchester Vegan Blue Block, has prompted Norseland to launch these as standalone products along with the new-to-market Ilchester Vegan Crumbly with Cranberry.

Norseland senior brand manager Lisa Harrison says: “We are proud to be the first dairy company to launch a plant-based alternative to cheese and the sales figures speak for themselves; sales of Applewood Vegan alone have



“We are proud to be the first dairy company to launch a plant-based alternative to cheese”

increased by 70.2%<sup>2</sup>.

“Our vegan cheeses’ popularity is partly due to their excellent ‘M-Factor’ – how well they melt – which makes them an attractive option for vegetarians and flexitarians as well as vegans.

“Covid-19 has also focused attention on eating healthier, lower-fat foods, which all of our vegan cheeses are. We cannot wait to see how our new products perform.”

### Source

<sup>1</sup> The Vegan Society, <https://www.vegansociety.com/news/blog/vegan-christmas-guide-2020>

<sup>2</sup> Kantar Worldpanel, 52 w/e 27.12.20

## HAS YOURS GOT THE

## FACTOR !

**FREE FROM**  
DAIRY, GLUTEN,  
SOYA, LACTOSE,  
& PALM OIL

**NEW FOR 2021**

**‘The most talked about Vegan Festive Selection of 2020’**

Our vegan range is made from the same great tasting coconut base so they **MELT** just as well as cheese!

[www.norseland.co.uk](http://www.norseland.co.uk)

## Northern Bloc

# Prioritising the health of the planet

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### KEY CONTACTS

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Co-founder and Director  
**Dirk Mischendhal**  
Co-founder and Director

### KEY BRANDS

Northern Bloc

During the pandemic, consumers have seen how their decisions can directly impact the environment and have sought out brands that align with their ethical values, says Northern Bloc co-founder and director Josh Lee. “Sales of Northern Bloc’s vegan 500ml tubs in retail increased by 60%<sup>1</sup> during 2020, when the appetite for sustainable eating jumped forward five years.

“Sustainability has always been at the heart of Northern Bloc. Last year, we were the first brand in the UK to launch fully biodegradable packaging on our 500ml tubs. Next, we’re investing a seven-figure sum in our infrastructure to enable even more sustainability.”

#### The only vegan mini tubs in retail

Lee adds: “This month, Northern Bloc launched a vegan mini tub line, the only product of its kind in supermarkets. This fills the gap for a super-premium vegan individual-serve tub, acting as an entry point into vegan ice cream and



“During the pandemic, consumers have sought out brands that align with their ethical values”

supporting consumers with portion control.” The mini tubs come in Vegan Chocolate & Honeycomb and Vegan Chocolate Stracciatella.

“Our innovation will continue to centre around consumer occasions. The success of our The Show Must Go On! tub, in Waitrose, which supports Theatre Support Fund+, demonstrates the consumer desire for a product that resonates with their values. We have more exciting collaborations ahead.”

### Source

<sup>1</sup> Northern Bloc internal sales data

# NORTHERN —BL°C—

## PLANT BASED CHOCOLATE INDULGENCE

MINI TUB MULTIPACK OUT NOW

GROWING **60% YOY** \*

**£1.5M INVESTMENT** \*\*

SOURCE: \*NB°C sales of 500ml tubs \*\* Jan 21 Investment



CHOCOLATE  
STRACCIATELLA



CHOCOLATE &  
HONEYCOMB

4x100ml

## Rude Health

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### KEY PRODUCTS

**Rude Health**  
– Almond Drink  
– Coconut Drink  
– Oat Drink  
– Barista Drinks  
– Cereals  
– Snacks

### Source

<sup>1</sup> Nielsen, Total EPOS Dairy  
Milk Alternatives, 12 w/e  
23.11.20

<sup>2</sup> Great Taste Awards, 2020

➔ Rude Health, the UK's No.1 organic dairy alternative brand<sup>1</sup>, is making a splash with its first-ever mass reach campaign later this year. The £30m RSV business is launching a £2m campaign later in 2021.

Rude Health co-founder Camilla Barnard says: “When we started out, dairy-free drinks were packed with gums, emulsifiers and thickeners, and they tasted bland. So, we made our own. Eight years later and we’re still 100% committed to taking the bland and turning it bright, using only the best quality natural ingredients for sustainability and flavour.”

In 2020, Rude Health was the proud winner of nine Great Taste Awards<sup>2</sup>, adding to their collection of five Great Taste Awards in 2019.

“Our Organic Almond and Coconut Drinks are the UK’s best-sellers<sup>3</sup> without any above-the-line marketing to date, in contrast to almost all of our competitors who have been investing



“We are committed to standing out in a sea of sameness”

heavily in this space,” says Barnard. “Now it’s time to get more people taking their first Rude sip.”

Rude Health notes that it has set itself apart by championing real taste and enjoyment, and with the added momentum of this £2m campaign, is strongly placed to continue to stand out in a sea of sameness on-shelf.

# MAKE SPACE FOR TASTE

# RUDE HEALTH

Winner of 9 Great Taste Awards in 2020.



Symington's

# Blooming Good development

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Marketing Director

## KEY BRANDS

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**Mug Shot**  
**Blooming Good Food Co**  
**Ragu**  
**Chicken Tonight**  
**Twist**  
**The Hungry Elephant**

➡ The pandemic has undoubtedly contributed to the growth of plant-based products, with health high on the consumer agenda.

"Products once seen as niche have moved into the mainstream, with 89%<sup>1</sup> of plant-based meals now consumed by non-vegans," says Emma Westerman, head of category at Symington's. "In January, we launched a 100% plant-based brand, Blooming Good Food Co. The instant hot snacks, available in Sainsbury's, come in four flavours: Warming Tomato & Lentil Dahl, Banging Black Eyed Bean & Vegetables, Hearty Sweet Potato & Lentil Curry, and Smokey Sweetcorn & Green Beans. The product has performed well and we've continued to see growth throughout February, post the Veganuary hype. As taste is the number one driver for plant-based purchases<sup>2</sup>, we've focused our efforts here and have some exciting launches lined up for the brand."

Symington's has also introduced a



“Products once seen as niche have now moved into the mainstream”

range of Naked Veg Pots, available in Malaysian Rendang Curry, Korean BBQ Ramen and Chinese Green Veg Broth. "The product is 100% plant-based and counts towards one of your five-a-day – the first from the portfolio to hold the health credential," notes Westerman.

"Our Free From Rice Pots are also 100% gluten- and dairy-free. We hope these products will inform consumers about our vegan and health credentials."

## Source

<sup>1</sup> IFT.org, December 2020

<sup>2</sup> Symington's, June 2020

# blooming good food co.

New

## Grow your own 100% plant based product range



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



@bloominggoodfoodco

## The Tofoo Co

# Helping people fall in love with tofu

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**David Knibbs**  
Co-founder

### KEY BRANDS

**The Tofoo Co**  
– Blocks  
– Bites  
– Chunkies  
– Sizzlers  
– Tempeh

➡ The Tofoo Co is the No.1 tofu and tempeh brand in the UK, with a 51% share of sales, and the third-largest brand in chilled meat-free<sup>1</sup>.

Launched five years ago, the business set out on a mission to help people fall in love with tofu. “Back then, no one really cared about tofu and we saw a huge opportunity to grow the category with a fantastic product and a vibrant brand,” says David Knibbs, co-founder.

Handmade in North Yorkshire to a traditional Japanese recipe and technique, the brand is not fake meat, says Knibbs. “It’s a delicious natural plant-based food. Our Naked Tofoo contains just three simple ingredients – soya beans, water and nigari – and our bean guarantee ensures all our soy is organic, GM-free, and obtained from a sustainable source. 2021 sees us strengthen that commitment by completing the assessment for BCorp.

“Tofu is now a £43.2m category, up 51% YOY<sup>1</sup>, and we believe it will



“We saw a huge opportunity to grow the tofu category with a vibrant brand”

hit £100m. More than one million households now buy The Tofoo Co’s products regularly, and our Naked block is one of the best-selling items in chilled meat free,” adds Knibbs.

“We’re working hard to change the perception of tofu just being an ingredient that vegans need to a wonderful ingredient that all consumers should want.”

Source  
<sup>1</sup> Nielsen Scantrack, w/e 30.01.21

# The No.1 Tofu & Tempeh



## Wholebake

# Innovation, quality and service

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### KEY PRODUCTS

**Sports nutrition bars**  
**Free from cereal bars**  
**Plant protein bars**  
**Cold pressed fruit bars**  
**Flapjacks**  
**Filled protein balls**



2021 is off to a flying start for Wholebake, one of the largest free-from manufacturers in the UK.

A pioneering foodie-led business, Wholebake was recently crowned Free-From Manufacturing Company of the Year at the prestigious Food Manufacture Excellence Awards. The company's investment in a state-of-the-art product development hub at its Chester base and new production capabilities at its two BRC AA manufacturing sites in North Wales have enhanced the range of market-leading products and services it offers its brand partners in the UK and across Europe, it says.

Wholebake produces more than 120 million bars a year and places innovation, quality and service at the heart of its business, it says. As consumer focus on health has intensified, Wholebake has extended its product portfolio of plant-based snacks and focused development in emerging growth areas like immune support,



**“Wholebake has extended its plant-based snacks range, focusing on emerging growth areas”**

gut health and high protein. It works with a broad range of sports nutrition, weight management, kids snacking, vegan-friendly, digestive health and mainstream better-for-you brands.

Wholebake was also certified as a B-Corp this month, having met rigorous environmental and social standards, joining more than 450 UK companies that use business as a force for good.



## Your co-manufacturing partner in free-from healthy snacking

**The leaders of innovation in the Free-from sector**, we offer a full project management service from category insight to launch. State of the art facilities with a customer innovation hub and 2 BRC AA accredited sites.



# WHOLEBAKE

Certified



Corporation

This company meets the highest standards of social and environmental impact

Unilever

# Adding healthy flavour

## DETAILS

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Unilever UK&I

## KEY BRANDS

Knorr

Over the last year, the nation's eating habits have changed completely. Covid-19 has accelerated many different trends in home-cooking, including the rise in popularity for plant-based meals at a time when health is top of the agenda. With over 20% of consumers saying they cut down their meat consumption during lockdown and one in five planning to continue to buy meat replacement products going forward<sup>1</sup>, this is no longer just a trend, but a lifestyle change for many.

With health more important than ever, consumers are also looking to make easy switches for healthier meals, including cooking with less salt.

## Cheat on meat

As shoppers seek easy ways to add full-on flavour to meat-free meals, Knorr has innovated to meet this demand, adding Vegan Flavoured Stock Pots to its range last year, in line with some of the nation's favourite dishes. The brand also launched its first-ever Liquid and Dry seasonings range to boost flavour in dishes that don't always need stock.

Fikerte Woldegiorgis, foods marketing director, Unilever UK&I, comments: "At Knorr, our mission is to be able to give shoppers a wide range of products that make it easy to add delicious flavours to their meat-free meals and counter the perception that these can't be as tasty. By offering more variety and flavour than ever before, we hope to encourage more shoppers to cheat on meat throughout the week with delicious home-cooked, meat-free meals."

## On the big screen

As well as innovation, Knorr has also invested in an ATL campaign to spread news of its flavoursome stock pots. In time for Veganuary this year and running until March, the brand returned to the nation's TV screens as part of a £6m #CheatOnMeat campaign to raise even more awareness of the range. The brand's ambassadors and popular cooking duo, The Hairy Bikers, encouraged viewers to create delicious meals with the help of Knorr Veggie Stocks. In addition, Knorr continues to amplify presence through online,



**“At Knorr, our mission is to be able to give shoppers a wide range of products that make it easy to add delicious flavour to their plant-based meals”**

in-store POS and on social channels to remain front of mind for shoppers.

## Zero salt, rich flavour

Knorr's mission is to offer a portfolio that fits in with different consumer needs and help them with their lifestyle goals – be that eating less meat or consuming less salt. As infants require a low-salt diet, for example, this is particularly important for new mums when weaning, as family diets sometimes may have to be altered to support this change.

So, Knorr, the UK's biggest stock brand<sup>2</sup>, has brought its new Zero Salt Stock Cubes – in vegetable, beef and free-range chicken flavours – to shelves at a time when health has taken priority. The low-salt recipe, which has garnered a prestigious Netmums Recommended Accreditation, includes no additives or replacements and is derived from sustainably farmed mixed herbs and spices. Woldegiorgis adds: "Our new category-first Zero Salts range, brimming with rich flavour, shows shoppers they don't have to make the impossible choice."

## 'Stock' up now

With the meat-free market predicted to grow by a further 13.2% in the next five years<sup>3</sup>, and home-cooking set to maintain its popularity<sup>4</sup>, she adds, Knorr will continue to innovate to make it even easier to add flavour to plant-based dishes at home.

## Source

- <sup>1</sup> Attest consumer survey for The Vegan Society – 'Change in behaviour during the Covid-19 pandemic', of 3,682 GB adults, conducted online between 10.04.20 and 22.04.20
- <sup>2</sup> Nielsen, GB Total Coverage including Discounters, Value (€), MAT to end 26.12.20
- <sup>3</sup> Kantar, Knorr, Total Stores, 52 w/e 27.12.20 vs previous year
- <sup>4</sup> Mintel Research, 2020
- <sup>5</sup> Mindshare, UK Covid-19 Tracker – Insights Report, Jan, Wave 17 08.01.21-13.01.21

SINCE 1838  
**Knorr**



# ZERO SALT RICH FLAVOUR



MADE WITH  
*Herbs & Spices*



**Recommended by Netmums**

\*In a poll of 103 Netmums members, 93% would recommend Knorr Zero Salt to friends and family.



## Violife Foods

# Celebrating life to the fullest

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## KEY CONTACTS

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Manager, Violife

## KEY BRANDS

**Epic Mature Cheddar  
Flavour Grated**  
**Epic Mature Cheddar  
Flavour Block**  
**Cocospread**  
**Smoky Cheddar  
Flavour Slices**

➡ The events of the last year triggered a huge uplift in people becoming acutely aware of their health. “Our focus on health influenced the foods we ate, with many turning to and experimenting with flexitarianism and enjoying the plant-based alternatives available on the market,” says Violife UK & Ireland country manager Simon Orchard. As a vegan alternative to cheese, Violife accounted for 68% of branded category growth last year<sup>1</sup> due to this surge in consumers searching for plant-based alternatives, he notes.

“The number one line in the category remains Violife Original Slices, which are convenient and versatile across sandwiches, toasties, burgers and as a standalone snack,” explains Orchard.

“Committed to making amazing-tasting, 100% vegan, non-dairy, non-GMO foods since the 1990s, Violife is proud to be a favourite brand for so many vegans, vegetarians and flexitarians in more than 50 countries around the world. The name ‘Violife’ comes from the Greek word ‘vios’, which means life, so the brand is life-squared, and we are devoted to making delicious vegan products to celebrate enjoying life to the fullest.”

Over the past year, Violife has launched three new products in the UK: Violife Epic Mature Cheddar Flavour Grated; Cocospread, which saw the brand take its first steps into the sweet spreads category; and, most recently, the Smoky Cheddar Flavour Slices, the first of its kind to have an edible hickory-smoked rind.

As a sibling to the award-winning Epic Mature Cheddar Flavour Block,



“Our focus on health influenced the foods we ate, with many turning to flexitarianism” and enjoying the plant-based alternatives on the market”

the Grated format has proved hugely popular with consumers, says Orchard. “In part due to its handy format, the unmistakable flavour of the Epic Mature Cheddar Flavour range is enjoyed by both plant-based eaters and flexitarians, with value sales reaching over £1.5m in less than a year<sup>2</sup>.”

Violife’s Cocospread is an example of the brand’s mission to create great-tasting products that can be enjoyed by everyone, he adds. “This innovative product was a big hit this past Veganuary, with weekly sales having more than doubled (+134%) in Veganuary 2021 vs sales in 2020<sup>3</sup>.”

“The Smoky Cheddar Flavour Slices, the brand’s latest product, have been well received since their launch in Tesco late January. As we head into summer, we hope this user-friendly format will become synonymous with summer outdoor dining and entertaining.”

2021 will be Violife’s biggest year on innovations yet, reveals Orchard. “We want to capitalise on key events like BBQ and Back To School to ensure shoppers have the opportunity to try plant-based solutions of their favourite meals. We’ll support this with exciting new product innovation and marketing.”



## Source

<sup>1</sup> IRI PlusSuite data: Total Market Value Sales to 05.12.20

<sup>2</sup> IRI PlusSuite data: Total Market Value Sales to 02.01.21

<sup>3</sup> Violife, unit sales to 23.01.21

# Violife

100% Vegan



## EMBRACE THE VEGAN OPPORTUNITY

- » Category now worth **£40m!**\*
- » Violife brand leader with **56%** share\*
- » Driving category growth with **+45%** sales\*
- » New Violife Epic Mature Cheddar flavour represents **22%** of category growth\*
- » Violife Cocospread is growing **+142%** month on month\*\*

\*Source: IRI Plus Suite, 52 weeks to Feb 27th 2021

\*\* Source: IRI Plus Suite, 4 weeks to Jan 30th 2021



VIOLIFEFOODS.COM

## Warburtons Gluten Free

# Driving growth in gluten free

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## KEY CONTACTS

**Chris Hook**  
Free From Director

## KEY BRANDS

**Warburtons Gluten Free**  
– Tiger Bloomer  
– Multiseed Boule with Sourdough  
– White Cob with Sourdough  
– Toastie  
– Multiseed Loaf  
– White Loaf  
– 4 Crumpets  
– White Wraps  
– High Protein Wraps with Superseeds  
– 4 Multiseed Sandwich Thins  
– 4 White Sandwich Thins  
– 4 Brioche Rolls  
– 4 Square Rolls

Warburtons, the UK's number one bakery brand<sup>1</sup>, has been committed to providing high-quality bakery products since 1876, that are not only delicious but also cater for a variety of different diets and lifestyles, it says.

In 2011, the fifth-generation family business recognised that more people were looking for quality gluten-free options, so invested in a dedicated gluten-, wheat- and milk-free bakery. “Ten years later and Warburtons Gluten Free has gone from strength to strength, seeing value share growth from 15.5% to 18.2%, and now being the No.1 Free From Bread Brand<sup>2</sup>, boasting more than 11 products in the range including loaves such as the Tiger Bloomer, Crumpets, Wraps and Thins,” says the company.

This last year has undoubtedly been challenging, but there has been strong growth within the free-from category overall, with Warburtons Gluten Free being a principal driver of that growth, it says. Notably, its Tiger Bloomer has cemented itself as both the No.1 Free From Bakery Bread SKU, and also the fastest-growing<sup>3</sup>.

“The key to success is innovation,” says Warburtons “Consumers following a gluten-free diet are looking for choice and that is where we focus much of our effort.” Last year, the brand launched its Gluten Free Toastie loaf and, this year, is introducing two brand new additions to its Gluten Free range; a pack of 4 Super Soft Sliced Square Rolls, and 4 Soft Sliced Brioche Rolls. Gluten free rolls are a significant part of free-from bakery, accounting for 16.3% of total volume<sup>3</sup>, yet there has been little genuine innovation in the area over recent years, contributing to sector decline, it says. Therefore, the two new products from Warburtons will provide consumers following a gluten-free diet with a greater choice of high-quality, tasty products.

## Brand refresh

These launches follow a complete refresh for the brand in 2020, which saw a move to predominantly orange packaging for the range. This new



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look was changed to coincide with the launch of the brand's gluten-free Toastie loaf, making Warburtons' Gluten Free range more easily recognisable as being baked by the UK's number one bakery brand<sup>1</sup> and creating clear stand out on-shelf on a typically busy fixture. The brand is also consistently supported by investment in marketing with paid social campaigns such as 'Gluten Freeedom' in 2020 and in-store activities and promotions to name a few.

## Quality principles

Chris Hook, free from director at Warburtons, says: “Quality underpins everything we do at Warburtons, and that is no exception for our Gluten Free products.

“We have seen lots of exciting changes recently and are thrilled to be launching our new rolls this year. These developments reinforce our commitment to the free-from sector as we continue to invest in expanding and improving our gluten-free offering.

“We are always looking at ways in which we can diversify our range in the total free from bakery category, so there will be more exciting things to come.”



## Source

<sup>1</sup> NielsenIQ RMS data, Wrapped Bakery Category, L52 w/e 30.01.21, UK Total Coverage incl. Discounters, Value Sales

<sup>2</sup> NielsenIQ RMS data, Free From Bakery 12 months ending 30.01.21, UK Total Coverage incl. Discounters, Value Sales

<sup>3</sup> NielsenIQ RMS data, Free From Bakery 12 months ending 30.01.21 for the UK Total Coverage incl. Discounters, Unit Sales

# Warburtons<sup>Family Bakers</sup> GLUTEN FREE



NEW SOFT, SLICED GLUTEN FREE ROLLS FROM  
THE NO.1 FREE FROM BREAD BRAND<sup>1</sup>



[warburtonsglutenfree.com](http://warburtonsglutenfree.com)

GLUTEN FREE | WHEAT FREE | MILK FREE

1 Based on NielsenIQ RMS data Free From Bakery 12 month ending 30.01.21 for the UK Total Coverage incl. Discounters, Value and Volume Sales  
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