

18 APRIL 2020

**GUIDE TO...**

**The Grocer**

# **FREE-FROM & PLANT-BASED**



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## ANALYSIS



# GROWING A NEW FUTURE

This category is becoming increasingly mainstream as brands pull out the stops to create appealing new innovations. **Johanna Thomson** reports



It's good news, 97% of households now regularly buy food or drink marketed as being free-from [Kantar 52 w/e 24 March 2019]. Take-home sales are up 36%, breaking the £2bn barrier for the first time.

Also nearly three-quarters of consumers have tried a plant-based meat alternative. It's not just the occasional vegan product, either. A third of consumers say they have considered adopting an entirely plant-based diet over the past year. That figure rises to 41% of 18 to 25-year-old consumers.

Health is one of the driving forces behind these numbers. More than half of consumers who considered switching their diet cited health as a reason – putting it above the environment and animal welfare concerns. That only changes among 18 to 25-year-olds, who named the environment as the biggest

influence in opting for plant-based.

So the question is, does this all of this mean it is time to take free-from out of the speciality aisles or do shoppers still need sign-posting and educating around this sector? Arla believes that there is still a need state for the free-from fixture for consumers who have allergies or intolerances so signposting is still important but more space is needed. Rebecca Allen, spokesperson for Arla Lactofree adds: “Given the innovation within this area there may be a need to increase space to keep up with consumer demand.”

Nick Wyatt, Nakd head of category agrees saying: “It is great to see free-from and plant-based in such strong growth as consumers continue to demand more from this space and brands continue to innovate. There are products that absolutely have the consumer-traction to be ranged alongside non-free-from, however, our research shows that **6 >>>**

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» 5 free-from shoppers still enjoy the speciality fixtures as a location where they can quickly and easily shop multiple categories in one place, while also discovering new products and formats.

“Also, with continued increasing consumer interest in the sector, it’s still beneficial to have a sign-post location to attract and educate new shoppers.”

One thing’s for sure, all the brands are keen to never compromise on taste no matter the ingredient preference. Nairn’s were one of the first branded players in the UK gluten-free market, and over the last decade, have continued to innovate and expand their award winning range. Nairn’s have applied over a century of expertise of baking with oats to develop a gluten free range that stays true to their baking philosophy of simple, natural and wholesome.

Emma Heath, head of marketing at Nairn’s, explains “Our portfolio is proof that gluten free products do not have to compromise on taste or texture - they are so good, you’d never know they are gluten free!”

### ADAPTING TO DEMANDS

As consumers seek products that cater for their dietary needs and preferences, many big brands are adapting a number of its favourites to meet demand.

The frozen free-from category in particular is worth £17.6m [Nielsen Scantrack WE 22.02.20 MAT TY - gluten-free and vegan category] and is a key growth area.

Sarah Koppens, marketing director for Birds Eye, explains: “Over the last year, we’ve seen more gluten-free options being added to the frozen aisles, as shoppers look for items that have a greater shelf life and generate much less waste than fresh alternatives.

“We now have Sweet Potato Waffles, Rainbow Waffles and gluten-free Fish Fingers. Our Goodfella’s Gluten-Free Range is also popular amongst shoppers, featuring the two most valuable branded free-from SKUs in the dietary market and in total worth £4.7m (39% of the total free-from category) [Nielsen Scantrack WE 22.02.20 MAT TY - excludes vegan / meat-free category].”

As increasing numbers of retailers

expand their vegan and free-from offering and with the category’s sustained performance, more retailers are looking to capitalise on the increasing demand for these SKUs.

Rebecca Allen, spokesperson for Arla Lactofree adds: “Key trends that we are likely to see coming up in the free-from category include more plants being used, like hemp and barley. We could also see new types of milk becoming more popular such as pea milk.

“New consumer trends in health and wellness are likely to play a bigger role, such as the increasing focus on gut health. Pre & probiotic is a strong growth area across other markets - not yet established in the UK.”

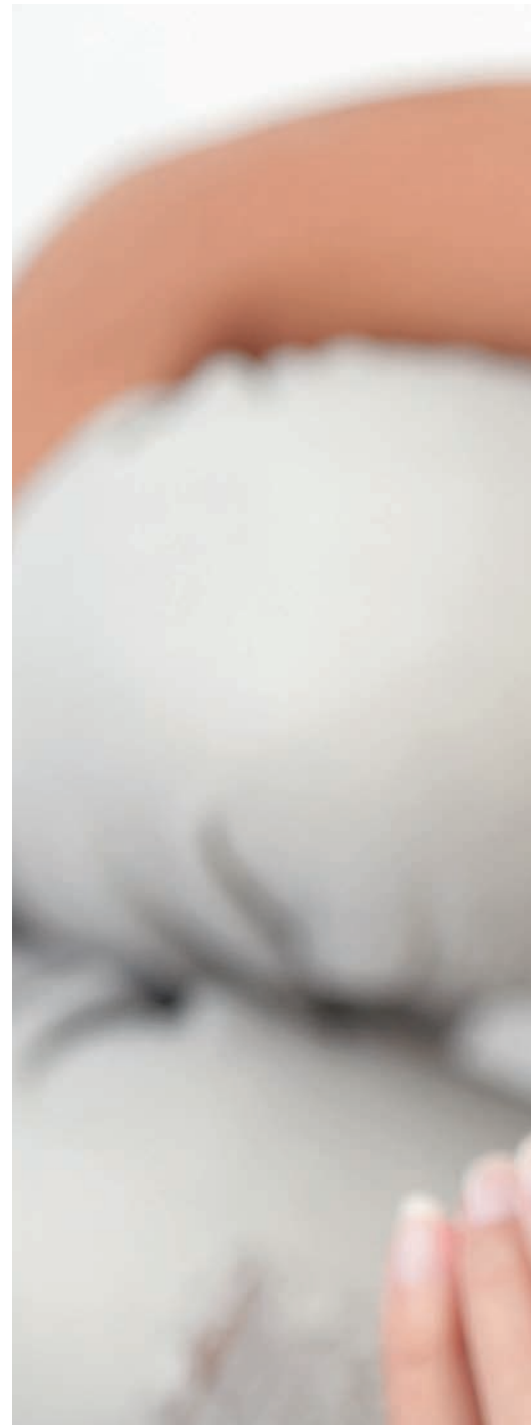
### INDULGENT SNACKING

There is a strong growth in sales for more indulgent snacking options within the free-from fixture, such as chocolate confectionery, snack bars and biscuits. The snacks that have proliferated the UK are better-for-you with added functional benefits like protein, gluten-free or vegan and ones that have a clear call out to the calories contained.

Nick Wyatt, Nakd head of category says: “Related to this, seasonal products are also seeing good growth; with shoppers purchasing for free-from family and friends during the key holiday seasons, and retailers flexing their in-store and online space to give prominence to these products. With more and more people adopting free-from and plant-based diets we see this trend continuing; along with consumers continuing to seek out better quality, more natural options.”

As one of the few bagged snack brands available that are free from all 14 major allergens, Eat Real’s Hummus, Lentil and Quinoa Chips, Quinoa Puffs and Veggie Straws - which are all certified vegan by The Vegan Society and gluten-free by Coeliac UK - all focus strongly on taste, texture and all-natural ingredients. The bold and innovative flavours have helped create a loyal and enthusiastic following - in 2018, Eat Real’s market share was 16.7% of the free from bagged snacks sector, in 2019 this had risen to 38.5%.

The Eat Real brand itself has grown by



“ Many big brands are adapting their favourites to meet demand for new needs and preferences ”



206% year on year, despite Ambient Free From category growth of just 9.4%.

“As the No 1 free from bagged snack brand, we work hard to ensure Eat Real stays ahead of the curve by meeting, or exceeding, the top five food trends,” comments Debbie King, director of commercial sales & marketing. “These include being plant based but also means they meet all the demands of snacking for healthier lifestyles, texture for a heightened sensory experience and product provenance.”

Clif Bar & Company (CB&C) has encour-

aged plant-based eating through promoting organic, plant-based diets as a way to cultivate change in the food system.

However, CB&C points out that it’s important to note that “plant-based” doesn’t have to mean going vegan. Simply put, plant-based (or plant-forward) diets emphasise eating more plants and fewer animal foods. Even small shifts toward a more plant-based approach can have a lasting positive impact on the health of people and the planet.

“By leading a conversation about the power of sustainable, plant-forward eat-

ing patterns for active people, we hope to drive change across the food system that will benefit the planet and the wellbeing of people today and tomorrow,” says Casey Lewis, lead dietitian and director of nutrition strategy at CB&C.

As part of its company mission, CB&C is partnering with nutrition experts on educational programs and tools designed to help support the adoption of healthy, sustainable eating patterns and practices.

“We’re committed to sharing resources and information on plant-based **B >>>**

## ANALYSIS

» 7 eating because we believe it can be an important driver in cultivating change in the food system,” Lewis adds.

Kind is spearheading snack bars’ move into the mainstream snacking arena – as opposed to appealing only to a niche slice of the market. The company says: “Kind has mass appeal as it tastes good and is surfing the wave of a trend towards wholesome ingredients. The snacks that have proliferated the UK are better-for-you, often with added functional benefits like protein, are gluten free or vegan, have a clear call out to the calories contained within a single serve or are made from wholesome and natural ingredients.

“Kind has coverage across the plant-based protein boost, on-the go breakfast & nutritionally dense, tasty snack. Crucially, shoppers are willing to spend more on these products than on traditional snacking – an opportunity for retailers to capitalise on the health halo to drive value back into snacking.”

### MARKETING BOOSTS

Veganuary is proving to be a real boost to the category – January 2020 was the biggest month ever for meat-free frozen products [Nielsen Scantrack to 4 weeks to 28.01.20]. The media has also played a role in its success by ensuring there is greater awareness of what is available.

Sarah Koppens, marketing director Birds Eye says: “The rise in plant-based diets is a trend that we’ve observed over the last few years, demonstrated by the proportion of Britons who have eaten food containing meat substitutes rising from 50% to 65%.

“The growth is in no small part a result of the depth in range and quality of vegan products now stocked by many retailers. Consumers have a far greater variety of products to choose from that overcome the previous barriers to plant-based diets, namely that shoppers felt they were compromising on taste by choosing meat-free products.

“This insight led us to launch the new Goodfella’s stone baked Meatless Mediterranean pizza this March, the UK’s first frozen vegan pizza product to feature plant protein but with a familiar meaty



“Inspiring consumers is a driving force for many brands in this sector and one of the reasons it’s flourishing”

taste. We’ve also switched the cheese on our Goodfella’s range of gluten-free pizzas from a low lactose to a standard cheese, ensuring that customers following gluten-free diets are getting the same great Goodfella’s taste.

“Health is high on the agenda for many consumers, with many moving away from meat-based products and adopting plant-based diets on account of the nutritional benefits associated with pea and soy protein meat alternatives. Plant-based substitutes are often rich in protein and low in saturated fats,





and can recreate the taste and texture of meat more closely than ever. Pea protein is also particularly high in iron content, with our Birds Eye Green Cuisine burgers providing 29% of an adult's GDA for iron, helping to sustain the levels often lost by consuming less meat.

#### **FOR HEALTH & THE PLANET**

Committed to mindful nourishment, Califia Farms is one of the leaders in the natural product space, actively reducing the sugar content across its entire portfolio. Its new Oat Barista Blend is

no different, containing less sugar than the market-leading Oat Barista in the UK. "As consumers have increasingly asked for lower sugar in the foods and beverages they consume, Califia has not only met, but exceeded, that demand - while continually innovating on great taste", explains Califia Farms CEO and Founder Greg Steltenpohl.

Inspiring consumers is a driving force for brands in this sector and one of the reasons it's flourishing so well. Cauldron, the UK's No. 1 plant-based brand in chilled meat-free, aims to

inspire everyone to change their eating habits, to eat better for their health and the health of the planet.

"We want to work with retailers to entice shoppers into trying Cauldron products, so that they can discover how amazing plant based food can taste and experience the nutritional goodness that comes with a plant based diet," says Andrea Harburn, brand manager at Cauldron Foods.

Freaks of Nature (FON) are also aiming to educate and convert. Peter Ahye, founder of FON, explains: "I set out to make great tasting desserts made purely from plants which are also free from. I wanted to make sure that we not only created a strong challenger brand in the Plant based/Free From market, but crucially wanted to be in control of innovation and manufacturing".

Following on from their 'The Grocer Top Product Launch 2018' for Frozen Meals, Deliciously Ella has launched their first frozen dessert, Fudgy Chocolate Brownie. The Deliciously Ella frozen range, celebrates simple, convenient plant-based eating, and balancing everyday with indulgence is an important part of this.

Matthew Mills, CEO, says: 'Since 2012, we've published over 300 indulgent plant-based recipes across our books, app & deli. Inspired by the most popular of these, we've created the ultimate delicious product'. Deliciously Ella are confident that this launch will drive new shoppers to the frozen aisle - given that 40% of existing brownie shoppers are entirely new to the frozen vegetarian category. Furthermore, it will expand the demographic of this area in store. This is due to the fact that the brownie shopper base over-indexes in AB shoppers and so will bring 20% more of this group to the frozen aisle than an average product in this category."

Kirsty's is also tapping into the desert aisles with its Apple Pie range. Kirsty adds: "So I am passionate about great free-from food and doing the best for my consumers. In fact a lot of our ideas come from our consumers," she continues, as did the 'hunch' that there was a gap for restaurant standard desserts in **10 >>>**

## ANALYSIS

» 9 controlled portions.”

The hunch proved right with Kirsty's Apple Pie, which comes in a 2 slice pack, selling 350k units in 12 weeks. 'Our Apple Pie is a gluten free & dairy free recipe, but it looks so good that it attracts a wider audience' Kirsty comments proudly.

The four-strong desserts range has driven a mind-set shift for the company, who have embraced a 'healthy balance' ethos to their range.

### FUTURE FREEDOM

Undeniably these are strange but interesting times and possibly suggest a cue to go back to basics. Rebecca Allen, spokesperson for Arla Lactofree adds: "I think what we will start to see is free-from moving into new areas of the supermarket, such as alcohol and we've seen this even in gluten free dog food! But also an emphasis not only on things being free-from but ethically and sustainably free-from."

Nick Wyatt, Nakd head of category says: "We are seeing an increase in the demand for products with added benefits within the free from and plant-based category especially sources of protein and fibre as consumers become more aware of broader health benefits. We also see consumers still conscious of their fruit/vegetable intake daily and looking for products which support. Our new Nakd Drizzled Choclish bars provide one of your 5 a day whilst still being a delicious and indulgent chocolatey treat."

Things have changed quite a bit for everyone with the pandemic and Kind have sent 300,000 bars to the NHS. The company adds: "We have also created a donation page where members of the public can nominate organisation and charities working on the front line to receive a Kind package.

"We predict we will send around 750,000 Kind bars to front line staff. On 1st April, we launched Kind breakfast, an on the go breakfast option made with 5 whole grain, packed full of fibre. Our large scale launch for this has been postponed but we are sending out our Kind breakfast bars to foodbanks across the country to support those that need it most."



“ The future is not just the emphasis on being free-from but ethically and sustainably free-from ”

And it business as usual for Promise Gluten Free who have been in the baking business for 50 years and have a range of products that sell in Sainsbury's nationwide. Their products online with Ocado will be available online from the 30th April 2020. Promise Gluten Free UK commercial director Nick Fox says: "During this Covid 19 Crisis, The Promise Gluten Free factory is still operating at full capacity and fulfilling demand for gluten free products across the UK and Ireland."

One thing is for sure, the world will be a very different place once this is over and those who react well will be remembered. ■

## NATURAL BALANCE

# KNOWN AND LOVED BY THE UK

## nākd.

### DETAILS

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### KEY BRANDS

Nakd

### SOURCES

1. Yougov snacking study April 2019 (2000 respondents).
2. MCA& HIM HEALTHIER EATING SURVEY, NOVEMBER 2018.

➔ Nakd was one of the first whole-food snack bar alternatives to enter the UK market and has been leading the way ever since with its number 1 selling Fruit & Nut bar range.

“Nakd is known and loved by consumers for its great taste, 100% natural ingredients and huge variety of flavours. Our Mind.Blown. campaign has brought to life our product benefits and helped us stand out in a cluttered category,” says Louise Cullinane, senior brand manager.

“More consumers are turning to free from and plant-based diets, which alongside food related conditions – like allergies or intolerances – is being driven by consumers wanting healthier and natural ingredients.”

In recent years a greater awareness of the positive environmental impact, alongside the health benefits, of adopting a more free-from and plant-based diet has further amplified the demand for this sector. NPd plays a key role in attracting new consumers, as well as keeping existing consumers engaged.

Nick Wyatt, head of category: “Ensuring brands are bringing new products to the free from and plant based fixture is key to meet the growing demands of con-



“More consumers are turning to free from and plant-based diets”

sumers and ensuring the fixture stays relevant.”

### LOVE OF TREATS

Nakd has recognised the nations’ love for treats, with the average consumer treating themselves 14 times a week\*, and 85% of those consumers looking for something sweet¹.

However, whilst consumers like to treat themselves and indulge, they are very conscious of making healthier decisions, with 65% of consumers feeling it is important for categories to offer healthier alternatives².

Cullinane adds: “This is where our new Nakd Drizzled Chokolish offers a perfect indulgent snack for the free from & plant-based category, without the compromise on health due to its wholesome and natural ingredients.

“This is the next step in Nakd’s whole-food revolution as we look to make healthier snacking more appealing for consumers without having to compromise in those more indulgent occasions AND we can’t forget to mention Drizzled Chokolish is one of your five a day Mind. Blown.

In 2020, Nakd returns to TVs with a £2.25M media spend to a amplify the 2nd year of our Mind.Blown campaign. Our TV campaign will be supported with Social, Influencers, sampling and in store activity throughout the year across the Fruit & Nut Bars range and also new Drizzled Chokolish bars

Cullinane concludes: “Our support of Nakd. reflects our ambition to step change the Nakd. brand and should give retailers continued confidence in the wider Nakd brand”.



ARLA

# LACTO FREE NO.1 AND GROWING



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Lactofree Milk  
Drink range  
Lactofree Cheddar  
Lactofree Brie  
Lactofree spreadable  
Lactofree Yogurts

## SOURCES

1. Kantar Worldpanel RST Total Free From Grocery 52w/e 01st December 2019
2. All Lactofree products are natural sources of calcium, phosphorus and protein. Lactofree milk drink and Lactofree Cheddar are also sources of Vitamin B2 and B12. Vitamin B12 contributes to the reduction of tiredness and fatigue. Calcium is needed for the maintenance of normal bones. Protein contributes to growth in muscle mass.
3. Easier to digest for those who may have gastrointestinal discomfort caused by lactose intake

“In recent years, the free-from category has seen huge growth, now worth £2.3bn and up 20.9% vs last year” Rebecca Allen, spokesperson for Arla Lactofree says: “Consumer trends around wellness and gut health are providing real opportunities for Arla Lactofree. Not only is it well positioned with its easier to digest messaging, but it also provides the great taste and nutritional benefits of dairy, perfect for those looking for a healthy option”

“The rise in the free-from market is bringing with it increased consumer demand for personalisation and innovation.

“They want products that mean they can easily adapt their lifestyle and diet in a way that works for them specifically. Innovation is really driving this category and we are seeing new development on niche products,” continues Rebecca.

“The other area that is extremely relevant right now is sustainability. People

“The rise in the free-from market is bringing with it increased consumer demand for innovation”



are more conscious than ever when it comes to what they buy. For Lactofree, we introduced an organic semi-skimmed product last year which comes in 100 per cent recyclable packaging, something we know is important to people and has contributed to the huge success of the product so far.

“This success is something we obviously want to continue across not only organic but the entire Lactofree range of milk, butter, cheese and yogurts. Our focus is on really driving penetration and making more consumers aware of the unique benefits of Lactofree.

“Arla Lactofree semi skimmed is already the number one SKU in the free-from category, however, our aim is to educate more people that you don't have to be lactose intolerant to enjoy Arla Lactofree. We will be investing heavily into digital channels as this is vital to connect with the right audience at the right time and continuing with our successful 'Bathtime' campaign in above the line advertising.”

# SAY HELLO TO THE NO.1 FREE FROM SKU<sup>†</sup>



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TO DIGEST\*\***

† Nielsen 52 we 22.02.20. \*All LactoFREE products are natural sources of calcium, phosphorus and protein, LactoFREE milk drink and LactoFREE Cheddar are also sources of Vitamin B2 and B12. Vitamin B12 contributes to the reduction of tiredness and fatigue. Calcium is needed for the maintenance of normal bones. Protein contributes to growth in muscle mass. \*\*Easier to digest for those who may have gastro-intestinal discomfort caused by lactose intake.

## BIRDS EYE

# MAKING MEAT-FREE MAINSTREAM

### DETAILS

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**Claire Hoyle**  
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### KEY BRANDS

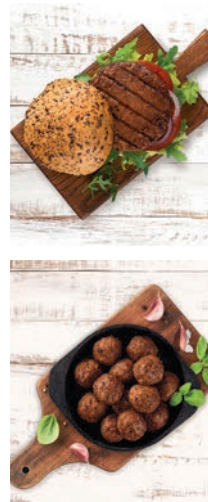
Birds Eye  
Goodfella's

↙ The continued rise of vegan and alternative diets has seen demand for meat-free products rise, with more consumers incorporating plant-based products into their diets, as seen through the proportion of Britons who have eaten food containing meat substitutes rising from 50% to 65%. There is a good opportunity, therefore, for brands and suppliers to continue bringing free-from and plant-based products into the mainstream and support retailers so they are able to make the most of the category.

Both Birds Eye and Goodfella's have successfully brought meat-free products to a mainstream audience, with the launch of vegan products that are perfectly placed to meet the growing demand for plant-based products. With more shoppers than ever seeking alternative sources of protein and reducing their meat consumption, retailers are well positioned to enhance their plant-based offerings with frozen meat alternatives.

### BEST VEGANUARY EVER

The social event 'Veganuary' has continued to attract more consumers into the meat-free category, with January 2020 the biggest month ever for meat-free frozen products, worth £16m and up +12%. Birds Eye is the fastest growing brand in the sector and drove 40% of that category growth through its new Green Cuisine range; its meat-free Meatball and Burger SKUs being the top-ranked vegan products in their respective categories less



“Veganuary has continued to attract more consumers into the meat-free category”

than a year after launch. Sarah Koppens, marketing director Birds Eye, said “The popularity of these products is down to Birds Eye's long heritage in pea production and its market-leading position in frozen food. Consumers trust the brand to deliver quality products, and by recreating mealtime classics using pea protein, we have successfully made the meat-free frozen fixture more accessible and inviting to families. Our Green Cuisine range is also a good source of fibre, protein and iron, helping more shoppers than ever to reduce the amount of meat they are consuming.”

### KEEPING FROZEN FRESH

Goodfella's has also responded to the consumer demand for meat-free products, introducing the UK's first frozen vegan pizza product to feature plant protein - Goodfella's Meatless Mediterranean pizza - this March. The launch aims to tap into the UK meat-free market, with meat-free foods now worth £816m.

Claire Hoyle, head of marketing at Goodfella's, says: “With 11.9% of meat substitutes launched in the UK in the past year containing pea protein, consumers are still demanding more plant-based protein products on their plates. As the brand leader in the frozen vegan and dietary pizza market, there was a clear need for us to innovate our offering and add a pea-protein based product to the range to develop the category further and show we are listening to consumers.

“The new Goodfella's Meatless Mediterranean pizza recreates the taste and texture of a meaty pizza, so both vegans and shoppers looking to reduce their meat consumption can enjoy a slice or two. This launch also follows the success of Goodfella's Vegan Stone Baked Spicy Vegetable Salsa, which was also created in response to shopper demand for indulgent pizza that features tasty, vegan-friendly cheese that doesn't compromise on texture or taste.”



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AVAILABLE IN THE  
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<sup>1</sup>SI research March 2020. Liked extremely well by 88% of consumers in testing  
<sup>2</sup>Pea protein contributed to 40% of growth of meat-alternative category sales in January 2020 Source: Nielsen ScanTrack, total coverage, Meat-Free Alternatives, volume sales 4 weeks to 28.01.20  
<sup>3</sup>Subject to availability



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## CALIFIA FARMS



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### KEY BRANDS

Califia Farms

Committed to mindful nourishment, Califia Farms is a leader in the natural product space, actively reducing the sugar content across its entire portfolio. The new Oat Barista Blend is no different, containing less sugar than the market-leading Oat Barista in the UK. "As consumers have increasingly asked for lower sugar in the foods and beverages they consume, Califia has not only met, but exceeded, that demand - while continually innovating on great taste", says Califia Farms CEO and founder Greg Steltenpohl.

In crafting Oat Barista Blend, Califia Farms set out to overdeliver on taste and function, working closely with the barista community to concoct the perfect oat milk. The result: a creamy, decadent experience and a product that perfectly complements the natural, robust flavour of coffee. It also steams without

“We want to inspire people with ‘what plants can do’”



### SOURCES

1. DuPont Nutrition & Health, 2018 survey of 1000+ US consumers.  
2. IRI, Total Market, Value Sales % Share, MAT 29/02/2020.

splitting and creates a delicate foam for impressive latte art. Daisy Swiers, senior account manager says: "Plant-based diets continue to rise due to personal and environmental health concerns. Plant milk sales in the UK have grown at over 23% in the past year<sup>1</sup>. Driving this growth is relative newcomer, oat milk, growing at over 184%<sup>2</sup>."

The company aims to inspire people with "what plants can do" by providing innovative products, nourishing recipes and guidance to go dairy free without compromise. "Taste, accessibility and environmental factors are key drivers of the plant-based movement. Millennials and Gen Zs are increasingly driven by sustainability factors as well as the positive impact we see on our bodies. Within the US market, 52% of US consumers are eating more plant based, with 60% making a permanent shift<sup>2</sup>."



# CALIFIA FARMS®

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- ✓ LOWER SUGAR\*

\*Than other Oat Barista brands

## CAULDRON

# A HOT POT OF GREAT IDEAS

### DETAILS

**Cauldron Foods**  
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Director

### KEY BRANDS

Cauldron

↙ Cauldron, the UK's No. 1 plant-based brand in chilled meat free<sup>1</sup>, aims to inspire everyone to change their eating habits, to eat better for their health and the health of the planet.

"We want to work with retailers to entice shoppers into trying Cauldron products, so that they can discover how amazing plant based food can taste and experience the nutritional goodness that comes with a plant based diet," says Andrea Harburn, brand manager.

Cauldron experienced a hugely successful January, with volume sales up 28% YoY<sup>2</sup>, boosted by a record 400,000 consumers signing up to the Veganuary pledge<sup>3</sup>.

The brand will be building on this momentum throughout 2020 with its biggest ever brand investment in the "Love Food. Eat Better" campaign, inspiring consumers to eat better via Shopper Marketing, YouTube, social media and PR events.

"Listening to consumers and celebrating great food discoveries is really important, as we want to help encourage shoppers switch to plant based eating. Cauldron makes it so quick and easy to enjoy plant based meals and snacks and this is a key requirement for increasingly busy shoppers," adds Andrea.

"Shoppers are increasingly on the lookout for more vegan options and since



“Category growth to continue with Cauldron, the UK’s no.1 plant-based brand in chilled meat free”

### SOURCES

- 1: IRI Value Sales 52 w/e 01/02/2020.
- 2: IRI Value Sales 4 w/e 01/02/2020.
- 3: Veganuary 2020.
- 4: National Vegetarian Week 2019.

reformulating our Moroccan Falafels, to remove the honey and replace it with agave, we have had lots of positive consumer feedback.”

Packaging is emerging as a top consumer concern and the brand is continually making improvements to its environmental credentials.

Cauldron Falafels and Sausages have been available in recyclable trays for many years and the brand has now switched to 100% recycled PET trays to complete the recycling chain.

This year, Cauldron will be a proud sponsor of National Vegetarian Week. Running from 11th May, the annual campaign supports The Vegetarian Society's "Eat to Beat Climate Change" pledge, encouraging people to try vegetarian and vegan food and giving those that already follow a meat free diet, a chance to try new recipes at home.

This year will focus on classic meals and Cauldron is sponsoring three classic recipes, which will be cooked by a celebrity influencer to increase campaign engagement: Cauldron Tofu Fish & Chips, Cauldron Tofu Rogan Josh and Cauldron Sausages & Mash to encourage consumers to switch to meat-free for the week.

The campaign will reach an estimated 46M<sup>4</sup> so we are encouraging retailers to stock up on Cauldron's core range of Tofu, Falafels and Sausages in order to make the most of the upcoming opportunity.





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



GROWING 28% YOY\*\*  
£3M INVESTMENT

**STOCK UP NOW**  
[customer.services@cauldronfoods.co.uk](mailto:customer.services@cauldronfoods.co.uk)

\*IRI UK Value Sales 52 w/e 01/02/2020. \*\*IRI UK Volume Sales 4 w/e 01/02/2020.

## CLIF BAR & COMPANY

# LEADING THE WAY IN PLANT BASED

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### KEY BRANDS

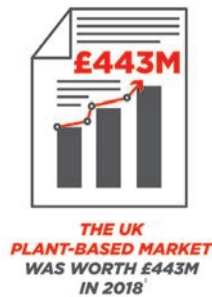
Clif Bar Energy Bar  
Clif Nut Butter  
Filled Energy Bar  
Clif Builders  
Protein Bar  
Clif Bloks  
Energy Chews  
Clif Shot  
Energy Gel

Since beginning in 1992, Clif Bar & Company (CB&C) has encouraged plant-based eating through the great tasting food we make, and by promoting organic, plant-based diets as a way to cultivate change in the food system.

It's important to note that "plant based" doesn't have to mean going vegan. Simply put, plant-based (or plant-forward) diets emphasise eating more plants and fewer animal foods. Even small shifts toward a more plant-based approach can have a lasting positive impact on the health of people and the planet.

"By leading a conversation about the power of sustainable, plant-forward eating patterns for active people, we hope to drive change across the food system that will benefit the planet and the wellbeing of people today and tomorrow," says Casey Lewis, lead dietitian and director of nutrition strategy at CB&C.

As part of our company mission, CB&C is partnering with nutrition experts on educational programs and tools designed to help support the adoption of healthy, sustainable eating patterns and practices.



“Plant-based eating is good for your body and your planet”

**56%** EAT VEGETARIAN OR MEAT FREE FOODS

**50%** OF THE POPULATION TO FOLLOW FLEXITARIAN OR PLANT-BASED DIET BY 2025

"We're committed to sharing resources and information on plant-based eating because we believe it can be an important driver in cultivating change in the food system," Lewis adds.

### RECIPES FOR SUCCESS

CB&C recipes have always been built around wholesome, plant-based ingredients, like whole-grain oats, nuts, and seeds that provide quality nutrition, not to mention "real" enjoyment.

In addition to plant-powered protein like soy, peas, and nuts, we focus on carbohydrates (whole-grain oats, sugar), functional fats (nuts, nut butters, seeds), and, of course, authentic flavour.

Lewis says: "Our love for plant-based eating also extends to supporting organic. That's why we're actively working to support the next generation of organic farmers. In fact, we're currently the No. 1 private funder of organic research in the United States.

"There's no getting around it, the way we produce and consume food has significant impact on our health and wellbeing.

The latest evidence suggests that the most health-promoting eating patterns, which emphasize plant-based foods like fruits, vegetables, whole grains, nuts, legumes, and seeds, also support a healthier planet.

"So, in a nutshell, plant-based eating is good for your body and your planet (and your soul)! And that's something we'll always take seriously."





**A BOUNTY OF  
PLANT-BASED GOODNESS  
YOU CAN FEEL GREAT ABOUT.**

**#1 NUTRITION BAR  
IN NORTH AMERICA** 

## DELICIOUSLY ELLA

# MAKING FREE-FROM DELICIOUS

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**Georgina Pattison**  
Commercial Director

### KEY BRANDS

Deliciously Ella  
Breakfast  
Deliciously Ella  
Frozen Meals  
Deliciously Ella  
Frozen Desserts  
Deliciously Ella  
Baked Oat Bars  
Deliciously Ella Baked  
Veggie Crackers  
Deliciously Ella  
Nut Butter Balls  
Deliciously Ella  
Caramel Cups  
Deliciously Ella  
Energy Balls

With its plant-based food range, Deliciously Ella is challenging preconceived notions of uninspiring vegan food. Ella Mills, founder, says: "Healthy eating should celebrate abundance, with delicious recipes and great ingredients. Ultimately, it needs to make people happier." Since 2016 Deliciously Ella has continued to grow as a strong cross-category player, making waves in the plant-based and free from space. The brand is uniquely positioned to rapidly transform consumer insights into delicious innovative products; with an active community of over 3.2million consumers providing daily feedback on recipe and product ideas.

### NEW INNOVATIONS

Following on from their 'The Grocer Top Product Launch 2018' for Frozen Meals, Deliciously Ella has launched their first frozen dessert, Fudgy Chocolate Brownie. The Deliciously Ella frozen range, celebrates simple, convenient plant-based eating, and balancing everyday with indulgence is an important part of this. Matthew Mills, CEO, says: "Since 2012, we've published over 300 indulgent plant-based recipes across our books, app & deli. Inspired by the most popular of these, we've created the ultimate delicious product".

Deliciously Ella are confident that this

“Deliciously Ella has continued to grow as a strong cross-category player, making waves in the plant-based and free-from space”

launch will drive new shoppers to the frozen aisle – given that 40% of existing brownie shoppers are entirely new to the frozen vegetarian category. Furthermore, it will expand the demographic of this area in store. This is due to the fact that the brownie shopper base over-indexes in AB shoppers and so will bring 20% more of this group to the frozen aisle than an average product in this category.

January marked the launch of the brand's very latest NPD, Baked Veggie Crackers, the first time the brand has ventured into savoury snacking – currently the fastest-growing snacking category.

This launch demonstrates the company's position at the forefront of free-from innovation. Free-from savoury snacks are now growing ahead of total savoury snacks (+23%) – demonstrating an increased appetite for products that meet these needs. In conjunction with this, 72% of shoppers are seeking healthier options, whilst concurrently demanding great taste and flavour.

Although savoury snacks have previously struggled to tick both of these boxes, Deliciously Ella's Baked Veggie Cracker range enables shoppers to make the right decisions for their needs and lifestyle, without compromising when it comes to taste. The range has launched with three recipes: Beetroot & Multiseed, Chickpea & Paprika and Sweet Potato & Rosemary. They work perfectly on-the-go as a delicious, easy-to-eat snack, dunked into dips or sprinkled over salads for extra crunch.

Ella Mills, founder, says: "We've been working on these crunchy, Baked Veggie Crackers for a few years now. We wanted to bring a totally natural product to the market, something thin and crispy with a perfect crunch that's baked not fried, full of flavour, plant-based and made with no additives, stabilisers or preservatives – it's taken time to make this happen and we're so proud of the final product."



DELICIOUSLY  
*ella*

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DELICIOUSLY  
*ella*

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WITH APPLE & RASPBERRY



PLANT-BASED  
DELICIOUSNESS



## PLANT-BASED DELICIOUSNESS

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RECYCLABLE



## MAKING BREAKFAST DELICIOUSLY PLANT-BASED

EAT REAL

# HEALTHIER SNACKING

DETAILS

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KEY BRANDS

Eat Real Hummus Chips  
Eat Real Lentil Chips  
Eat Real Quinoa Chips  
Eat Real Quinoa Puffs  
Eat Real Veggie Straws  
Eat Real Organic  
Hummus Chips  
Eat Real Organic  
Lentil Chips  
Eat Real Organic  
Veggie Straws

➡ The increasing popularity of free from diets – for health, lifestyle or ethical reasons – is a key driver in Eat Real’s phenomenal growth. No longer considered niche, the demand for free from and plant based is coming from choice as well as necessity with consumer preferences for healthier snacking showing no signs of slowing down anytime soon.

As one of the few bagged snack brands available that are free from all 14 major allergens, Eat Real’s Hummus, Lentil and Quinoa Chips, Quinoa Puffs and Veggie Straws - which are all certified vegan by The Vegan Society and gluten-free by Coeliac UK – all focus strongly on taste, texture and all-natural ingredients.

Their bold and innovative flavours have also helped create a loyal and enthusiastic following - in 2018, Eat Real’s market share was 16.7% of the free from



“We work hard to ensure Eat Real stays ahead of the curve”

bagged snacks sector, in 2019 this had risen to 38.5%. The Eat Real brand itself has grown by 206% year on year, despite Ambient Free From category growth of just 9.4%.

“As the No 1 free from bagged snack brand, we work hard to ensure Eat Real stays ahead of the curve by meeting, or exceeding, the top five food trends,” comments Debbie King, director of commercial sales & marketing. “These include being plant based but also means they meet all the demands of snacking for healthier lifestyles.”

The year ahead will see a vigorous programme of new product development, extensive trade and consumer PR activity, consumer sampling and high profile advertising campaigns designed to increase brand awareness and drive footfall to the fixture. The future is Real. Eat Real.

Let's SHOUT about it!

Delicious healthier snacks  
Just got **Real.**

GLUTEN  
FREE  
VEGAN

#1

FREE FROM  
BAGGED SNACK BRAND

+206% GROWTH YOY

AWARD WINNING RANGE

MEETING THE  
**TOP 5**  
FOOD TRENDS  
SINCE 2014

FREE FROM ALL  
14 MAJOR ALLERGENS

f i t #eatreal www.eatreal.co.uk





## FREAKS OF NATURE

# FREAKY INNOVATION



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Commercial Director  
**Tim Higgins**  
Commercial Manager  
**Lucy Figg**  
Marketing Manager

### KEY BRANDS

Freaks of Nature

➡ Freaks of Nature the plant-based dessert brand has continued to make positive strides at its dedicated dairy free, egg free and gluten free facility. The truly innovative, desserts producer has achieved BRC grade A accreditation alongside approvals to supply to Sainsburys, Co-op and M&S making it the largest dedicated dairy free factory of its kind in Europe.

During summer 2019, they won The Grocer's Start Up of the Year and New Product awards. The judges praised the business for its "innovative spirit" and said, "its major listings are clear testament to its products."

Peter Ahye (Founder of FON) explains: "I set out to make great tasting desserts made purely from plants which are also free from.

"I wanted to make sure that we not only created a strong challenger brand



“I set out to make great tasting desserts made purely from plants”



in the Plant based/Free From market, but crucially wanted to be in control of innovation and manufacturing”.

The recent high-profile stories on allergen control, have helped our products stand out from the rest, our point of difference being that our facility does not bring any dairy, gluten or eggs into the production areas. This means we can focus firmly on allergen compliance throughout the supply chain.

Freaks of Nature's Hot Puddings and Cold eat desserts now have listings with all the major retailers alongside products we make for Sainsburys, M&S and Co-op. ■

# PLANT POWER



NEW



KIND

# KIND OF BRAND SHOPPERS WANT

DETAILS

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KEY BRANDS

Kind

Kind bars are made with whole nuts, fruits & grains, bound together with honey. The first ingredient in every Kind product is a nutritiously dense one, whether it be a nut, grain or fruit. Kind is spearheading snack bars' move into the mainstream snacking arena – as opposed to appealing only to a niche slice of the market, Kind has mass appeal as it tastes good and is surfing the wave of a trend towards wholesome ingredients.

The snacks that have proliferated the UK are better-for-you, often with added functional benefits like protein, are gluten free or vegan, have a clear call out to the calories contained within a single serve or are made from wholesome and natural ingredients. Kind has coverage across the plant-based protein boost, on-the go breakfast & nutritionally dense, tasty snack. Crucially, shoppers are willing to spend more on these products than on traditional snacking – an opportunity for retailers to capitalise on the health halo to drive value back into snacking.

### CHANGED DAYS

Things have changed quite a bit for us with the pandemic we are currently in but we wanted to create a difference where we could so sent over 300,000 bars to the NHS. We have also created a donation page where members of the public can nominate organisation and charities working on the front line to receive



“Kind has played a strong role in delivering market growth”

a Kind package.

We predict we will send around 750,000 Kind bars to front line staff. On 1st April, we launched Kind breakfast, an on the go breakfast option made with 5 whole grain, packed full of fibre. Our large scale launch for this has been postponed but we are sending out our Kind breakfast bars to foodbanks across the country to support those that need it most.

Snack bars are segmented into a few sub-categories including breakfast, light/slimming, kids etc. but the key drivers of the category's growth over the past 3 years has stemmed from either products with a protein addition or products sitting within the natural nutrition space or free from. Within each of these key growth sub-categories, Kind has played a strong role in delivering market growth far in excess of market share. Consumers continue to focus on health & wellness & are willing to spend more on products they believe are nutrient dense meaning categories are premiumising.



**NEW!**



 **BREAKFAST**

good starts with **KIND**<sup>®</sup>

**HIGH  
FIBRE**

**WHOLE &  
NATURAL  
INGREDIENTS**

**GLUTEN  
FREE**

## KIRSTY'S

# FEEL GOOD FOOD



### DETAILS

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**Dave Sparrow**  
Finance & Ops Director  
**Natalie Parker**  
Marketing Manager

### KEY BRANDS

Kirsty's

📌 Kirsty's grew an explosive +64% YOY, with all product categories driving growth despite challenging category conditions. Unusually for a second year in market, Kirsty's frozen pizzas grew a blistering +35% YOY. "Being uniquely allergen free, our pizzas are 80% incremental to the category," says Kirsty Henshaw, founder of Kirsty's, "and our shoppers very loyal, with 77% only buying Kirsty's pizzas".

A loyalty that Kirsty returns "14 years ago my then baby son had a severe allergic reaction". Kirsty adds: "So I am passionate about great free-from food and doing the best for my consumers".

"In fact a lot of our ideas come from our consumers," she continues, as did the 'hunch' that there was a gap for restaurant standard desserts in controlled portions."

The hunch proved right with Kirsty's



“Being uniquely allergen free, our pizzas are 80% incremental to the category”

Apple Pie, which comes in a 2 slice pack, selling 350k units in 12 weeks. 'Our Apple Pie is a gluten free & dairy free recipe, but it looks so good that it attracts a wider audience' Kirsty comments proudly.

The four-strong desserts range has driven a mind-set shift for the company, who have embraced a 'healthy balance' ethos to their range.

"Most people want to eat healthily but also want to be able to have treats, they want that balance," Kirsty explains, "but in all cases they want food which makes you feel good".

### WATCH THIS SPACE

And what of the chilled ready meals range, which continues to grow in a declining market. Kirsty remains tight lipped about plans for the future, but says "big things are coming this year", so watch this space. ■

new



Kirsty's  
Thoughtful Food

- ✓ GLUTEN FREE DESSERTS  
made with Dairy free recipes
- ✓ INCREMENTAL  
70% to the category
- ✓ 2 SLICE PACKS  
driving impulse purchase



JOINING A WELL-ESTABLISHED  
& well loved range



FASTEST GROWING  
Free-From pizza brand



NO1 FREE-FROM  
ready meals range

‘Seriously good’ desserts...

## NAIRN'S OATCAKES

# SIMPLE OAT SOLUTION

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Senior Brand Manger

**KEY BRANDS**  
Nairn's Oatcakes

➡ Nairn's was one of the first branded players in the UK Gluten Free market and, over the last decade, has continued to innovate and expand its award winning range.

Nairn's has applied over a century of expertise of baking with oats to develop a gluten free range that stays true to its baking philosophy of simple, natural and wholesome. The portfolio is proof that gluten free products do not have to compromise on taste or texture - they are so good, you'd never know that they are gluten free!

Emma Heath, Head of Marketing at Nairn's, explains that whether people are following a gluten free diet for medical reasons or as a lifestyle choice, they are looking for lots of variety and quality products that taste great. They also want gluten free products to be healthy, and all Nairn's products carry a number



“Gluten free products do not have to compromise on taste or texture”

of important health benefits. In particular, the gluten free sweet biscuits contain up to 50% less sugar than the average GF biscuit. Heath explains that the team regularly brings new products to market based on market trends and consumer needs, and the range now includes oatcakes, flatbreads, crackers, sweet biscuits, cereals, bars and snacks. Nairn's invested over £6.5m in a bigger, state of the art gluten free bakery a couple of years ago.

With consumers demanding more choice, the free from fixture continues to see a wide range of new products coming into the market.

This suggests that GF as a lifestyle choice shows no signs of slowing. On-the-go products are also becoming such a big part of people's daily routines, which prompted the launch of the Nairn's Oat Bar and Pop Oat ranges to tap into this growing eating behaviour. ■

MORE TASTE. MORE CHOICE. MORE SALES.

THERE'S SO MUCH

MORE

TO OUR GLUTEN FREE.






**GLUTEN FREE**  
WHOLEGRAIN OATS



**COELIAC**  
UK APPROVED



**HIGH IN FIBRE**

Discover the range at [WWW.NAIRNS-OATCAKES.COM](http://WWW.NAIRNS-OATCAKES.COM)



PROMISE GLUTEN FREE

# PROMISE WITH A PUNCH

**DETAILS**

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U.K Commercial  
Director

**KEY BRANDS**

Promise

➔ A game changer in the gluten-free category, Promise Gluten Free is bringing tastier, healthier breads and baked goods to consumers

The term “gluten free” is often synonymous with “taste free.” That’s especially true for gluten-free breads, which have earned a reputation for being bland, dry and dense, as well as high in fat and low in fibre. Enter Promise Gluten Free, a family-run bakery in County Donegal, Ireland that’s changing the game in the gluten-free category. Launched in 2011, the brand has spent years perfecting the art of gluten-free baking so consumers no longer have to compromise on taste or quality. Now Ireland’s top gluten-free bakery, Promise Gluten Free continues to expand in grocery stores across the U.K and also internationally, including in Canada, the U.S.A and Australia.

Promise Gluten Free offers an irresistible range of gluten free breads, crafted using a slow and unique bread-making technique that guarantees excellent taste and quality. From its Vegan White Rolls & Vegan Soft White Loaf, to its tantalising Brioche Loaf - Promise Gluten Free offers the finest, delicious, nutrient-rich, baked goods that everyone will love. All produced from the Promise Gluten Free family-run, dedicated gluten free bakery which has over 50 years of craft baking expertise. Whether you’re making a lunchtime sandwich swap from an ordi-

“Promise Gluten Free packs a nutrient punch”

nary bap to a Promise Gluten Free Vegan Soft White Loaf or switching up your teatime snack with a make your own subway roll, Promise Gluten Free has something for everyone... proving how easy it really is to switch to gluten free bakes whilst maintaining your love for bread. The brand has enjoyed great success across the U.K and Ireland with its White and Multi Seed rolls proving very popular with Slimming world advocates.

Promise Gluten Free packs a nutrient punch, not only is it dairy free and delicious, it’s low in fat, sugar and super high in fibre when compared to other gluten free bread brands, whilst maintaining the great taste and texture you can expect from bread (gluten free or otherwise)! Promise Gluten Free U.K commercial director Nick Fox says, “We are delighted to bring a great tasting range of Gluten Free Breads to the U.K. that are also packed with nutritional benefits, you won’t believe that they are gluten free. Finally, no more compromising.”

Promise Gluten Free has been in the baking business for 50 years and have a range of products that sell in Sainsbury’s nationwide and their products online with Ocado will be available online from the 30th April 2020. During this Covid 19 Crisis, The Promise Gluten Free factory is still operating at full capacity and fulfilling demand for gluten free products across the U.K and Ireland.



# PROMISE GLUTEN FREE



**HIGH IN FIBRE, LOW IN FAT,  
DAIRY FREE AND VEGAN**

AVAILABLE IN SAINSBURYS & COMING SOON TO OCADO



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# NO.1 HEALTH FRUIT & NUT BAR BRAND\*

Fruit, nut and cocoa bars dipped & drizzled in Chocolish.

Chocolate...the Nākd way!



100%  
natural ingredients  
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gluten free  
vegan

\*IRI Total Cereal Bars Data up to 29.02.20