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The Grocer Guide to...

The Grocer

Free from & plant based



Analysis

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Facing into a tough market

Inflation is hitting free-from and plant-based as consumers look to tighten the purse strings. So, how do suppliers believe the market will pan out in 2023?

There's nothing like a cost-of-living crisis to put a spanner in the works. While the free-from and plant-based categories have been flourishing in recent years, the past 12 months have proven more challenging. The category generally sits at a higher price point than regular counterparts and while consumers are still keen to protect their health and the planet, financial pressures can take precedence, leading them to pursue lower-priced or own-label options – or even backtrack on some of their good intentions due to cost concerns.

Suppliers in the free-from and plant-based market agree that shoppers are feeling the impacts of the cost-of-living crisis. Jason Fordham, consumer insights director at The Compleat Food Group, says the total plant-based market is still worth £597m, with 47% of the

population buying into the category¹, but notes that brands will have to fight harder for space in consumers' shopping baskets. "As budgets are tightened plant-based meat alternatives will be increasingly in competition with meat, but also with vegetables themselves, as people instead look to cook budget dishes from scratch using ingredients like beans and lentils."

He says the cost-of-living crisis is certainly putting pressure on consumers, impacting the performance of plant-based, as research shows healthier and plant-based diets are perceived as more expensive².

David Knibbs, co-founder and MD of The Tofoo Co agrees there is no doubt the chilled meat-free category is suffering in the current climate, with declines in value. However, he believes it has reached "a level of maturity and



the pace of growth in new brands and additional space in the category has stopped". Total meat-free value is now £326.4m, down £31.9m on last year³, he says. "With total price inflation up 7.1%³ year-on-year (YOY) in March, the cost-of-living crisis is undoubtedly a main driver in loss of sales." His hypothesis is that "flexitarians, who previously boosted this market, are either returning to cheaper meat alternatives or having meat-free days from outside the category, such as pasta & sauce, pizza or veg-based meals".

That said, he feels tofu is showing more resilience than total chilled meat-free, up 4.7% in value over the last four weeks vs a total category down 9.3%⁴. "The consumer environment is tough right now and only the strong brands will survive," he says.

Vinnie Senthil, category manager

at This, agrees that chilled meat-free has struggled to lap an unprecedented Covid period, during which the market grew faster than expectations as shoppers changed their buying habits to favour in-home. He says inflation has been a major issue with prices across chilled meat-free rising by 8% in the four weeks of January YOY⁵. "Crucially, this is much lower than the 16% reported by Kantar for the wider grocery market," he notes. "Positively, we are seeing the price gap between meat and meat alternatives continue to narrow, as meat was up nearly 12%, with the difference now just £0.13/kg."

Meanwhile, even with the inherent value benefits that frozen food brings, such as helping to reduce waste and extending shelf life vs chilled, fewer shoppers are visiting the meat-free category⁶, believes Victoria Westwood,

marketing lead UK&I for Green Cuisine at Birds Eye. "Consumers who are 'lighter' shoppers of meat-free foods are the most prevalent demographic leaving the category." Despite this, she remains confident that the category will return to strong growth, with the alternative protein market forecast to become 11% of the overall global protein market by 2035⁷.

With shoppers becoming more price-conscious, and reverting back to more familiar choices, plant-based has naturally been impacted, as it's a relatively new category for some, says Georgina Bradford, marketing director nutrition at Unilever UKI. "However, people still want healthier, more sustainable choices and to eat less meat, so the fundamental shopper needs that have driven plant-based over the last few years remain." With 45% of consumers intending to limit the amount they spend eating out this year⁸, she says there is an opportunity to inspire shoppers and help them access more affordable and enjoyable at-home alternatives. This is where she feels meat-free suppliers can dial up their taste credentials and create a new opportunity for retailers.

Arla Foods maintains the cost-of-living crisis has resulted in "some switching into own-label brands", with lactose-free own-label shares increasing over the last year, says brand and sustainability director Rachel Campbell. This has prompted the company to focus on bringing new shoppers to the brand with a 'Love Me or Your Money Back' scheme, allowing them to try the company's milk drinks and claim their money back if they don't love them. In addition, Arla is looking to drive at least one-cross-category purchase – such as cheese, butter or cream – across its portfolio.

However, Bel UK is optimistic that plant-based cheese occasions are continuing to grow ahead of cheese and wider plant-based dairy⁹. The plant-based alternatives to cheese category is now worth £174m, nearly a fifth of the dairy alternatives category¹⁰, it says.

Violife head of Northern Europe Victoria Slater agrees that the plant-based cheese category has continued to rise, up 5% in value over the past year¹¹, and expects this growth to continue throughout 2023 as more people make the decision to test and incorporate

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plant-based products into their daily life. However, with consumers looking closely at their weekly shopping basket in the current climate, she says Violife is working to ensure it is always offering products that deliver on taste and quality at competitive prices. “Brands still hold the lion’s share of the plant-based cheese category (84%)¹² and Violife is king with in that, with a value market share of 49%¹³,” she says.

After several years of growth, 2022 saw a decline YOY for gluten-free biscuits, says Northumbrian Fine Foods. It points to broader supply chain issues beyond inflation and the cost-of-living, such as the availability of key raw materials, which it says have had a deeper impact on the category. While it acknowledges that there has been RSP inflation in the gluten-free market, it says prices have been slower to move up compared to conventional biscuits. However, with research suggesting more gluten-free shoppers are likely to be doing so for lifestyle reasons than for medical needs, there is a risk these could switch into conventional biscuits they consider better value¹⁴. However, the company’s research also suggests two-thirds of gluten-free biscuit buyers “are planning to buy the same amount or more over the next six months”.

Cooking and baking from scratch rather than eating out of home is one way consumers may be looking to save money, says Freee founder Claire Marriage. “Our range of gluten-free flours and foods allow customers to do just this,” she notes pointing to both value (+5.8%) and volume (+2%) growth in the gluten-free flour market this year to date¹⁵. “We recently compared the overall cost of baking gluten-free bread at home to that of loaves available to buy in supermarkets and found this to be, on average, 35% cheaper,” she says.

Merchandising considerations

In the past few years, retailers have increased their merchandising around plant-based. However, in light of the current market situation, they will be looking to gain maximum traction from the plant-based category in-store, points out The Tofoo Co’s Knibbs.

“Space and range offered to plant-based has expanded, but with that we see much duplication across several brands with little differentiation,” he says. “This duplication and lack of



innovation mean shelf space is not maximised to drive sales.” He points to meat-free burger and sausage SKUs having significant duplication with variants across many brands – yet the sectors showing significant decline at -14.1% and -12.2% respectively¹⁶.

Senthi from This believes meat-free is at a crossroads in terms of the best way to merchandise the category to drive penetration and growth. “Many retailers have trialled merchandising by need state (eg moving all the chicken SKUs together) but this is detrimental for the category, with declines in ROS. “We’ve heard first-hand from consumers that this makes the fixture too hard to shop and they find it easier to find products by brand, which has seen retailers like Morrisons revert to brand blocking. Some retailers are also moving the fixture closer to the meat aisle, so it will be interesting to see if that becomes the norm or if plant-based solidifies its position across all alternatives (milks, meat, cheese) to warrant an aisle of its own.”

Unilever’s Bradford says most

consumers expect to find chilled meat alternatives in a dedicated area¹⁷ with 40% of shoppers already knowing what brand they are going to purchase¹⁸. As such, she believes there is a big opportunity to bring new shoppers into the category by making sure it has maximum visibility in-store, through clear signposting and the relevant bays featuring top-selling products.

“Beyond core fixture work, there have been examples of shopper activations such as long-life plant-based drinks partnering with key cereal and dry foods brands, with usage and occasions insights to encourage cross-category purchases,” notes Arla’s Campbell.

In terms of free-from, retailers generally signpost their sections well, says Freee’s Marriage. “However, the limited space available for such products is not always being used for truly ‘free from’ options and those best-sellers most pertinent to the gluten-free shopper,” she adds. “We’d recommend retailers focus on offering options from trusted gluten-free brands and gluten-free versions of the best-sellers in other



categories, so consumers are able to access all the core products they need in one dedicated space.”

Northumbrian Fine Foods agrees that gluten-free has a dedicated location in-store for all products, but believes shopper navigation could be improved by clearer signposting of sub-sectors and merchandising by need state. “We have worked with retailers to create more shelf space in the fixture by developing single-facing portrait SKUs, which are narrower in design than standard outers,” it notes. “This makes the most of available shelf space, allowing us to offer shoppers greater choice at point of purchase while maximising the potential return.”

Year ahead

For most the biggest challenge of 2023 will be supporting consumers through the ongoing cost-of-living crisis.

At Bel UK, key barriers to category entry cited by consumers include taste, price and lack of options. “All consumers have different motivations for deciding to adopt a flexitarian or

plant-based diet – from health and environment to taste preference and convenience,” it says. “So providing consumers with choice is critical.”

Both Bel UK and Violife foresee good opportunities for plant-based cheeses, with Violife’s Slater expecting “continued growth across 2023” and Bel UK pointing to the fact that two in five UK consumers say they would like “a wider variety of plant-based cheese in supermarkets¹⁹”.

A key challenge in free-from will be offering consumers value – not just by providing the lowest price, but also offering trusted and reliable products which deliver on their key benefits and promises, says Freee’s Marriage. “We expect health and sustainability to remain concerns for the majority of consumers, so continuing to offer quality products that taste great, with these benefits will offer an opportunity for free-from brands.”

Main challenges are the impact of the cost-of-living crisis and its impact on household budgets, followed by shelf space in-store, if retailers look to reduce space allocation for the category as a whole or for individual sectors, such as biscuits and cookies, says Northumbrian Fine Foods. “This, in turn, will make it more difficult to get distribution for incremental innovations.” Yet innovation is the main opportunity, it adds, as this helps keep shoppers engaged with the category by providing greater choice and lessening the need for lifestyle gluten-free shoppers to switch to conventional equivalents.

At Compleat, Fordham believes the category is still showing resilience despite the cost pressures hitting consumers. “The opportunities in the category are still there, but as the number of plant-based options increase, consumers need to be enticed by products that go beyond the ordinary products they have come to expect on supermarket shelves. Most importantly, though, products need to taste great if they are to compete with their meat counterparts and vegetable-based dishes and to encourage consumers to keep coming back.”

Birds Eye’s Westwood agrees that some of the main challenges for meat-free brands remain around the taste and quality of meat substitutes. “Suppliers need to focus on renovating

meat alternatives to improve their taste and quality credentials to bring them closer to their meat counterparts,” she says. “Through our heavy investment in Green Cuisine, we aim to show that meatless options can be just as tasty.”

The Tofoo Co’s Knibbs notes that the category benefited perversely from unfortunate circumstances facing the planet – from the growing health crisis to climate change to the global pandemic – and consumers were motivated to change their behaviour as a result. “However, now, economic pressures are once again altering consumer behaviour. So, for the category to continue to grow and reach its full potential, consumers need to be motivated by the positives it has to offer and shift their attitude from necessity to desire: ‘I want it because I enjoy it,’” he explains.

The key to igniting strong growth is to bring in new consumers and drive penetration, he says. “Penetration for chilled meat free is at 31% and, for tofu 8%, reminding us that this is still a relatively young market with so much untapped potential.”

Senthi from This agrees that the big opportunity will be driving penetration again with meat reducers and flexitarians who have lapsed from the category. He says there has been some real consolidation in retailer ranges over the past year or so, which he feels was needed, as the category faces overcrowded and confusing fixtures, a tail of underperforming SKUs and products not delivering on taste.

“The plant-based opportunity isn’t going anywhere,” asserts Unilever’s Bradford. “In fact, one in five households have at least one member following a meat avoidance or reduction diet²⁰, with many now adopting a flexitarian lifestyle, too. The demand for plant-based is still very much front of mind for shoppers.”

Sources

- ¹ Kantar, 19.02.23
- ² IGD: Plant-based: not just for January, Feb 2023
- ^{3&4} NielsenIQ, 52 w/e 26.03.23
- ⁵ IRI, Total Market, Chilled Meat-Free, w/e 22.01.23
- ⁶ Kantar, Worldpanel, -6.1% YOY, L52 w/e 19.03.23
- ⁷ US Dept of Agriculture, UBS, Euromonitor, ING, Good Food Institute, expert interviews, Blue Horizon and BCO analysis
- ⁸ Link Q Survey, Out of Home, April 2022
- ⁹ Kantar Usage, Total In Home
- + Carried Out, Total Cheese, Occasions in Millions, Rolling 52 w/e 27.11.22
- ¹⁰ Kantar, 52 w/e Sept 2022
- ¹¹⁻¹³ Nielsen, 52 w/e 25.03.23
- ¹⁴ VYPR, Jan 2023, n=510
- ¹⁵ NielsenIQ, gluten-free flour excl corn, YTD ending 11.03.23
- ¹⁶ See 3+4
- ¹⁷⁻¹⁸ Kantar LinkQ WP + Plant Based Shopper Journey
- ¹⁹ Mintel, UK cheese market report, 2022
- ²⁰ Kantar, Diets of Britain LinkQ, Oct 2020, 52 w/e 26.12.21

Arla LactoFREE

Lactose-free dairy goodness

DETAILS

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Rachel Campbell
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KEY PRODUCTS

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

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

“At Arla Lactofree, we believe a life without lactose won’t stop you enjoying what feels good, so our range means shoppers don’t have to miss out on the things they love most about dairy,” adds Campbell. “Our milk range offers the same choice as regular dairy, from fresh or long-life skimmed, semi-skimmed and whole milk. We’re also proud to offer a delicious selection of real full-flavour cheese, just lactose-free. Meanwhile, our cream adds that touch of silky extravagance to everything it touches, and Arla Lactofree Spreadable products are delicious and 100% natural.”

Cost-of-living support

Across the category, shoppers are feeling the impacts of the cost-of-living crisis, which has resulted in some switching to own-label brands, notes Campbell. “For lactose-free own-label, we have seen shares increase over the last year, which means we have been working hard to bring shoppers back to Arla Lactofree, with campaigns, such as our ‘Love Me or Your Money Back’ scheme,” she says. “This is part of our strategy to bring new shoppers into the category, by allowing them to try our milk drink and claim their money back, if they don’t love it. We are also focusing on driving increased purchases across the brand portfolio; so, where shoppers are purchasing just milk, we’re working to drive at least one cross-category purchase, such as cheese, butter or cream.”

A campaign this summer will highlight the limitless opportunities that Arla Lactofree provides, which will target new and existing lactose-free shoppers, she explains. “Arla Foods is also the headline sponsor for this



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

year’s Great North Swim, where Arla Lactofree will be offering samples of its delicious dairy products alongside entertainment. It’s the perfect link-up for a brand that is all about feelgood dairy, inspiring consumers to take care of themselves from the inside out.”

Our journey to carbon net zero

Arla Foods is committed to working with its farmer-owners to provide natural, nutritious dairy, made in the best possible way, adds Campbell. “We are on a journey to be carbon net zero by 2050, which means we are taking steps to reduce CO2e emissions across our operations,” she says.

“Last year, Arla launched its Climate Action Roadmap – Towards Carbon Net Zero British Dairy. As part of this, we will focus on reducing emissions throughout production, transport and logistics, packaging and on-farm.”

Arla Lactofree’s 1L and 2L cartons are already made from FSC-approved cardboard, with an inner and outer layer made from bio-based PE plastic – a residue from paper production that would otherwise go to waste.

EMBRACE

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*Easier to digest for those who may have gastro-intestinal discomfort caused by lactose intake.



STRENGTH COMES FROM WITHIN

Bel UK

Planting the seeds of growth

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KEY BRANDS

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

With its current total portfolio enjoyed in 41% of all UK households¹, Bel UK is bringing its experience of building household brands to the plant-based sector, combining this with consumer insight to diversify its portfolio and feed a growing population with delicious plant-based ranges, says the company.

“With plant-based cheese occasions continuing to grow ahead of cheese and plant-based dairy as a whole², Bel UK’s innovative plant-based portfolio is unlocking incremental sales opportunities and driving value into the category, with complementary ranges for varied consumer needs,” it notes.

Nurishhing consumer appetites

Nurishh is loved by 81% of customers who try it³, reveals Bel UK. So, with taste perception being a big barrier to entry in the category, the brand is so confident in its delicious offering that it is launching a ‘try me free’ promotion in May. Enabling consumers to try the full range for free, this will offer a huge incentive for shoppers and boost for retailers, with the brand’s last ‘try me free’ promotion seeing 25% of shoppers purchasing a plant-based alternative to cheese for the first time⁴, it reveals.

Feeding consumers’ appetite with a versatile range that delivers insight-driven innovation, the brand’s latest launch, Nurishh Plant-based Greek Style Cubes follows the dynamic feta cheese segment growing by 16% YoY⁵. This plant-based offering has a lower kcal intake, fat content and higher



“With plant-based cheese occasions continuing to grow ahead of cheese and plant-based dairy as a whole², Bel UK’s innovative plant-based portfolio is unlocking incremental sales opportunities”

protein than the leading competitor. In addition, Nurishh Gran Vegiano caters for the second-biggest usage in the cheese and plant-based categories – Italian dishes⁶ – with a unique, pre-grated alternative that delivers a plant-based taste of Italy at 41% less fat than the main competitor⁷, it says.

Inspiring flexitarian, vegetarian, and vegan consumers with delicious plant-based recipes, the wider range includes a Plant Based Alternative to Camembert, Mozzarella Style Block, Cheddar & Mozzarella Style Grated Blend, Cheddar Style Slices and Plant-Based Garlic & Herbs Spread.

Catering to snacks and indulgence

Catering to the appetite for convenient, plant-based, grab-and-go snacking options, Babybel Plant-Based, the Vegan Society-certified offering from the No.1 snacking cheese brand⁸ has attracted over 311k new shoppers⁹, says the company. “In the brand’s fun, portioned format, but with a delicious, dairy-free alternative, new paper packaging and green wax, although a single SKU, it already accounts for 2.4% of the total plant-based alternative to cheese market¹⁰,” it says.

Boursin Plant-Based Garlic & Herbs is now the No.1 in plant-based indulgence¹¹, adds Bel UK. “Inspired by the original Boursin, the UK’s No.1 indulgence cheese brand¹², it serves up unique plant-based indulgence for consumers seeking more sophisticated options. With indulgence and taste a big purchase barrier in the plant-based category, it is a must-stock for retailers looking to get their share of sales.”

Source

¹ Kantar WPO, Total Market, Total Cheese, Total UK, Bel Brands, 52 w/e 25.12.22
² Kantar Usage, Total In Home + Carried Out, Total Cheese, Occasions in Millions, Rolling 52 w/e 27.11.22
³ 2293 respondents during Try Me Free activation June-August 22
⁴ IRI, Total market GB, 52 w/e 28.01.23
⁵ Kantar Usage panel, Total Cheese, Top three dishes, 52 w/e 27.12.20
⁶ Per 100g compared to Violife Greek White Block
⁷ IRI, All Outlets + KWP Discounters CYTD, 31.12.22
⁸ Kantar, 52 w/e Sept 22
⁹ IRI, Major Multiples, CYTD, 31.12.22
¹⁰ IRI, 52 w/e 31.12.22, Kantar 52 w/e 25.12.22
¹¹ Total UK, Value Sales, 52 w/e 31.12.22





No.1

CONTRIBUTOR TO GROWTH*

APPLYING CHEESE EXPERTISE TO DAIRY-FREE ALTERNATIVES



REVOLUTIONISING PLANT-BASED ALTERNATIVES TO CHEESE WITH NO COMPROMISE ON TASTE!

*IRI, Value sales contribution to growth of the plant-based alternatives to cheese category, Manufacturer level, MAT 31.12.2022.

AND LEADING PLANT-BASED ALTERNATIVES IN SNACKING & INDULGENCE**



**IRI, Value sales, alternatives to cheese, MAT 31.12.2022.

Beyond Meat

Expanding its UK reach

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Beyond Burger®

Beyond Sausage®

Beyond Mince®

Beyond Meatballs®

Beyond Smash®

Beyond Burger®

Chicken-Style

Beyond Fillet®

Beyond Nuggets®

Beyond Tenders®

➔ This spring, Beyond Meat is stepping up its offer in the UK with a range of mouth-watering plant-based chicken-style products, reveals the company. The Beyond Burger Chicken-Style launched in Waitrose this month, and lands in Sainsbury's stores from May, alongside the Beyond Fillet and Beyond Nuggets, with further listings expected in coming months.

Like all Beyond Meat products, the new Beyond Chicken-Style products are made from plant-based ingredients and are designed to look, cook and taste like their animal equivalent, it says. "Crispy on the outside thanks to their golden breading, and incredibly tender and juicy on the inside, these delicious products are suitable for carnivores, flexitarians, vegetarians and vegans alike," says Steve Dalby, regional sales manager UK at Beyond Meat.

"At Beyond Meat, we work tirelessly to champion a more accessible and sustainable food system. With almost half of British adults considering reducing their intake of animal products in future, our delicious new Chicken-Style range enables people to continue eating what they love in a way that's kinder to the planet, with no sacrifice."

The new Beyond Meat Chicken-Style range includes:

- Beyond Burger Chicken-Style: this new plant-based burger packs a punch with 15g of protein per 100g.
- Beyond Fillet: a delicious, versatile option, quick to prepare and suitable as a main course.
- Beyond Tenders: prepared quickly and easily, these used on salads, in a pitta or as a poke bowl topping.
- Beyond Nuggets: tasty and convenient, making them a winning combination for family and friends.



“April sees the new Beyond Chicken-Style range land in stores, and the roll-out of Beyond Sausage 50g, with the plant-based pioneer promising that there is even more to come – in May, and beyond”

The new Beyond Chicken-Style products complement the existing Beyond Meat portfolio (see side panel).

Updated sausage for UK tastes

Beyond Meat is always working to bring the world's best plant-based meat products to market, adds Dalby. Recently, the Beyond Sausage has been optimised for UK consumers – moving from packs of 2 x 100g sausages to packs of 4 x 50g sausages. "These juicy plant-based sausages are ideal for all occasions; from a cooked breakfast, to a quick lunch or an evening meal," he adds. The 50g sausages will replace the 100g in supermarkets across the UK.

New visual identity

This year, Beyond Meat will introduce new packaging designs to bring a consistent look across its chilled and frozen portfolio.

Supporting the brand's full portfolio from May, Beyond Meat is introducing a new advertising campaign, developed with marketing agency OLIVER. This features rave taste reviews from fans of the brand, encouraging others to try the products and also be amazed by the delicious taste of Beyond Meat.



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Now available for chilled and frozen retail.

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beyondmeat.com



Birds Eye

Welcome to the Plant Age

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KEY BRANDS

Green Cuisine

 In July 2022, Birds Eye set out to reappraise meat-free perceptions and challenge consumers' eating habits through its rebranding of Green Cuisine. "Following the rise of plant-based and flexitarian diets, we want to show that plant-based options can be just as tasty as their meat counterparts," says Victoria Westwood, marketing lead, UK & Ireland for Green Cuisine. "With taste the No.1 purchase driver for consumers, ensuring flavour and the quality of the ingredients replicate the real product is a key part of our approach¹."

In 2022, the company launched its Green Cuisine Battered Fish-less Fillets, as a natural extension to Green Cuisine's Fish-less range, followed by Breaded Fish-less Fillets in January this year. "Following heavy investment into the brand, consumers and retailers agreed that we did not compromise on taste with this innovation; the product recently won Product of The Year 2023, following on from Green Cuisine Chicken-free Dippers' win of the same award the year before," reveals Westwood. "Our Green Cuisine portfolio is perfectly placed to support families who want to swap out traditionally meat-based family favourites."

The importance of trust

Trust remains pivotal between shoppers and brands, notes Westwood. "In times of adversity, consumers naturally gravitate towards brands they know can deliver on quality and which they know will be eaten (and enjoyed)," she says. "Shoppers are watchful of how they spend their money and, for many, this will mean prioritising products they know they can rely on. Many meat-free brands don't have the luxury of heritage and the trust this brings, which could be one reason why some shoppers are leaving the category. This is also one reason why we've been focusing our attention on driving trial with shoppers through an on-pack 'Love Me or I'm Free' promotion. Running across Green Cuisine Fish-less Fingers and Battered Fish-less Fillets (January and February) and Chicken-Free Dippers (March to May), we're giving shoppers the opportunity to get their money back if



“ Shoppers are watchful of how they spend their money and, for many, this will mean prioritising products they know they can rely on”

they decide these products aren't quite right for them – that's how confident we are in the quality of the range.”

Team GB Partnership

Following a successful partnership with Team GB during the Tokyo 2020 Olympic Games, Green Cuisine will again be an Official Partner of Team GB ahead of the Paris 2024 Olympic Games, furthering the brand's mission to make plant-based foods accessible to all, says Westwood. The collaboration will see Green Cuisine help educate the nation on the nutritional benefits of plant-based food, as well as supporting Team GB's drive for environmental sustainability.

Spearheading the campaign, the two brands have joined forces to launch 'Get Set to Go Green', an educational programme to empower children to explore sustainability and advocate healthy habits. The initiative aims to reach over 25,000 primary school teachers, providing them with downloadable lesson content. Founded on Team GB's youth engagement programme 'Get Set', it will also educate parents and teachers on how easy, tasty and nutritious it can be to incorporate plant-based options into everyday meals.



Source
¹ U&A, S2 Q8 & Q9 MMH, Q12 & Q13 Consumption drivers, consumption occasions IT 2018 total fish = 924; total frozen fish = 139

**TAKE A
TASTY
DIP INTO
PLANT
BASED!**



MEAT FREE
FROM THE FREEZER

**WELCOME TO
THE PLANT AGE**

The Compleat Food Group

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DETAILS

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KEY BRANDS

Squeaky Bean
Vadasz
Wall's
Pork Farms
Wrights
Unearthed

↙ The Compleat Food Group is one of the major UK food businesses in the plant-based category, driving growth through its leading brands, product innovation and speed to market, explains Yvonne Adam, chief marketing officer at the company.

“Plant-based offers huge opportunities for brands that can deliver culinary innovation and provide consumers with great-tasting vegan choices,” she says. “The Compleat Food Group is at the forefront of this category, creating market-leading products with its disruptive brands Squeaky Bean and Vadasz, while ensuring family favourites such as Wall’s Pastry and Pork Farms are catering for a growing number of flexitarians.”

Brand performance

Vegan brand Squeaky Bean, famous for its category-leading ready-to-eat pieces and slices, has attracted an army of ‘Squeaky’ fans in the four years since it launched, and has been growing ahead of the wider category, up 9.8% in the latest 52 weeks¹, reveals Adam. “This has been driven by the brand meeting the increased demand for plant-based NPD with no compromise on taste and texture,” she explains.

“This includes the launch of its first-to-market Squeaky Bean Chorizo Style Sausage. Created using the same slow dry-curing process as its meat equivalent, it has an authentic smoky flavour and is popular with consumers due to its great taste and versatility.”

Squeaky Bean recently expanded its range into the frozen category with the launch of its Chicken Style Nuggets, Dippers and Poppers, reveals Adam. “With consumers increasingly turning to the frozen aisle to manage their weekly shopping budget, these perfectly replicate the taste and texture of their meat counterparts,” she notes.

The Compleat Food Group is also driving growth in wider plant-based categories, including fresh condiments, adds Adam. “Vadasz, the No.1 chilled pickles and ferments brand², has seen exceptional growth of 33% in the latest 52 weeks³, as consumers use its range of fresh kimchi, sauerkrauts and



“Plant-based offers huge opportunities for brands that can deliver culinary innovation and provide consumers with great-tasting vegan choices”



pickles to elevate their dishes,” she says. “As well as adding big flavour and delicious texture, these vegan products boast a variety of gut-friendly ingredients that appeal to health-conscious consumers.”

Market innovation

This expertise and the group’s plant-based capabilities are also driving innovation across its other brands, including trusted favourites Wall’s Pastry and Pork Farms, explains Adam. “Tapping into the increased consumer demand for plant-based options, Wall’s Jumbo Vegan Roll and Pork Farms Porkless Pie were created to deliver all the great taste and convenience you’d expect from these popular sausage roll and pork pie brands. Wall’s is continuing to build on its success in plant-based with a relaunch of its Jumbo Vegan Roll this summer, with a new and improved recipe that offers its best taste yet with no compromise.”

“The Compleat Food Group’s mission is to create ‘Food to Feel Good’ products that people love to eat,” concludes Adam. “And there is more exciting market-leading innovation to come.”

Source

^{1,2,3} IRI 52 w/e data to end Feb 23

FOOD TO FEEL GOOD



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compleatfood.com/brands

FREEE

Real gluten-free momentum

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KEY PRODUCTS

- Gluten Free Flour
- Gluten Free Baking Essentials
- Gluten Free Baking Mixes
- Gluten Free Breakfast Cereals
- NEW Gluten Free Single Serve Breakfast Cereal
- Gluten Free Pasta
- Gluten Free Oat Bars
- Gluten Free Cookies

Source
¹ Nielsen IQ, gluten-free flour excl. corn, 52 w/e 11.03.23
² Nielsen IQ, RTE gluten-free cereal, 52 w/e 11.03.23
³ Nielsen IQ, gluten-free flour excl. corn, YTD ending 11.03.23

Freee is a leading gluten-free flour and food brand, home to the No.1 gluten-free flour range in the UK¹, as well as other products suitable for gluten-free home baking, breakfast, snacking and more, says founder Clare Marriage. “Offering trusted and naturally gluten-free food for every meal occasion throughout the day, Freee products never compromise on taste, are subject to a rigorous testing regime and are always clearly labelled,” she says. “Everything is produced in dedicated gluten- and nut-free production facilities.”

The full range of products (see left) is suitable for plant-based diets, with 60% of the range organic, and multiple products high in – or a source of – fibre and protein, giving plenty of options for those looking for ‘better for you’ and more sustainable choices, she notes.

“Over the past year, Freee has seen strong growth, particularly across its breakfast cereals and gluten-free flour,” reveals Marriage. “Driven by a combination of innovation, such as Freee Supergrain Hoops and Freee Fruit & Fibre Flakes, as well as increased listings for existing products, sales of Freee breakfast cereals have grown strongly at 29.9%² adding £375k to the market – the single biggest value growth contributor of all gluten-free RTE cereal brands³,” she says. “This is a key area for Freee following a multi-million pound investment into a new gluten-free cereal production plant in 2018.”

Most recently, Freee launched new portion-sized packs of its best-selling cereals range. Made without any of the top 14 allergens, the range caters to gluten-free living, but also many other



“Offering trusted and naturally gluten-free food for every meal occasion throughout the day, Freee products never compromise on taste, are subject to a rigorous testing regime and are always clearly labelled”

requirements, including plant-based diets, notes Marriage. Each product is certified organic, so customers can be assured the cereals are made from sustainably grown ingredients.

“Alongside breakfast cereals, Freee is seeing strong growth across specialist gluten-free flour where it is the market leader⁴,” says Marriage. “This sector has had a strong start to 2023, with value up 5.8% and volume rising by 2%⁵. Freee gluten-free flour blends continue to outperform the overall gluten-free flour market with value sales up 6.9%, and volume rising by 2.3%⁶. These numbers point to a robust market for gluten-free home baking as people stay in more to counter the cost-of-living crisis.”

More broadly, Freee has seen higher demand for its wider range, particularly gluten-free oat bars and pastas, suitable for plant-based diets and delivering on healthy eating trends, she adds. The brand recently secured further listings with Waitrose and Ocado for its Freee Oat Bars. Similarly, Freee’s gluten-free Brown Rice pasta has recently been listed by Waitrose and Sainsbury’s.

To raise brand and product awareness, as well as to offer advice, baking and recipe inspiration to consumers, Freee invests significantly in social media, such as Instagram and Facebook, and recently launched a TikTok page. It also has an annual programme of marketing activity across broader digital, print and PR.



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*Nielsen IQ, RTE breakfast cereal and gluten free flour, L52 weeks ending 11/3/2023.



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KEY BRANDS
Galaxy Gluten Free Cookies
Twix Gluten Free Cookies
Bounty Gluten Free Cookies

➔ The total cookies market is worth £148m, growing in value by 4% year on year¹. Free-from cookies now contribute over £12m to the total category and, in volume terms, this segment has grown by more than 6% over the past two years².

Interestingly, brands represent 69% of conventional cookie sales value but only 30% of gluten-free cookie sales, representing a significant £4.8m of retail sales opportunity within the category¹.

This month, Mars Chocolate Drinks and Treats has launched a range of new gluten-free cookies, which it believes will accelerate the growth potential in this category. New Galaxy, Bounty and Twix Gluten Free Cookies, contain gluten-free oats with the signature flavours and chocolate of each iconic brand. Galaxy Gluten Free Cookies are bursting with oats and smooth Galaxy chocolate; Twix Gluten Free Cookies contain chocolate and caramel pieces; with Bounty Gluten Free Cookies containing coconut and chocolate.

With distinctive brand-led packaging, each pack contains four individually wrapped cookies, perfect to consume at home or on-the-go. Whether buying gluten-free biscuits and cookies out of dietary necessity or generally looking to reduce gluten in their diets, consumers are consistent about the key factors affecting their buying choice. Gluten-free biscuits should taste as good as –



“Familiar brands and great taste combine to create incremental cookie sales”

or better than – conventional biscuits. And, shoppers like to see a good choice of flavours to choose from, so they don't have to compromise on their gluten-free diet to enjoy their favourite biscuits⁴.

Gluten-free cookies and biscuits are bought less often than other core free-from products³, a fact that Mars Chocolate Drinks and Treats is keen to reverse.

Michelle Frost, general manager at Mars Chocolate Drinks and Treats says: “Consumers are increasingly seeking gluten-free alternatives from both a dietary necessity and also as a lifestyle choice. Our new gluten-free cookies deliver on taste and offer this growing shopper segment the opportunity to enjoy some of their favourite confectionery brands without compromising on their dietary requirements.”

Initially launching in Sainsbury's, the range (RSP £2.89, with 4 x 30g cookies in each pack) is targeted to roll out to a wider retail and convenience distribution over the coming months.



Source
¹ IRI, Grocery Outlets, 52 w/e 18.08.22
² IRI, Grocery Outlets, 52 w/e 25.02.23
³ VYPR, Gluten/Wheat Free Demographic, n=200, January 2023; Mintel Free-From Foods UK, April 2022
⁴ VYPR, Buyers of Gluten-Free Biscuits at least every 2 months, n=256, February 2023

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Rhythm 108

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KEY BRANDS

Rhythm 108
– 100g Chocolate Tablets
– 33g Chocolate Bars
– 135g Biscuit Share Bags
– 50g Soft-Baked Cookies

Source

¹ IRI (Chocolate bars) – Vegan and FF brands. Supermarkets GB & NI. 52 w/e 19.02.23
² Statista: <https://tinyurl.com/2natruyh>

➡ Rhythm 108's team of Swiss experts craft the tastiest chocolate, biscuits and cookies, with absolutely no compromise for those looking for an indulgent treat, it says. Its entire range, offered in plastic-free or sustainable packaging, is vegan, gluten-free, organic and palm oil-free.

A pioneer in plant-based, with one of the first impulse vegan chocolate bars on the market in 2017, Rhythm 108's soft-baked cookies – with Hazelnut Praline or Chocolate Peanut Butter filling – were also a first-to-market in 2021. Launched at the height of lockdown, they have sold over 2 million units, reflecting the fact that shoppers are still seeking little indulgences in challenging economic times. Its latest innovation – a crunchy filled biscuit SKU – is already available in Sainsbury's, Asda, Ocado and over 15 independent wholesalers catering to organic and health food stores.

Show-stopping innovation is central to Rhythm 108's ambition to disrupt



“Rhythm 108's soft-filled cookies have now sold over 2 million units since their UK launch in 2021”

plant-based confectionery and bakery. Already the leading premium chocolate brand in free-from¹, it plans to grow its share in a UK confectionery market that is set to rise by 1.4% in volume in 2024².

Founder Siddhi Mehta says: “We're committed to growing our market share through innovation and disruptive marketing. Our ambition is to open up Rhythm 108 to as many new shoppers as we can and make shopping conscious confectionery the first choice for all.”

The Leading
**PLANT BASED
PREMIUM CHOCOLATE
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RHYTHM 108
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Contact: sales@rhythm108.com

*Source: IRI (Chocolate bars) – Vegan and FF brands. Supermarkets GB & NI. 52 W/E 19/02/23

The Tofoo Co

Brilliant natural alternative protein

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KEY BRANDS

Tofoo
- Block
- Scrambled
- Silken
- Tempeh

Source

¹ Nielsen NIQ 52 w/e 26.03.23

Some may thank the rise in veganism for The Tofoo Co's success, others Suella Braverman and her 'tofu-eating wokerati', but the real secret lies in just three natural ingredients – soya beans, water and nigari, says co-founder and MD David Knibbs. "Together they create a special tofu, a tofu that is changing people's opinions and is worth eating, as affirmed by our Great Taste Award win in 2022," he says. "A consumer wrote to us recently – 'I'm Japanese and have been living in the UK for 25 years. I must stress that your tofu is *the best* – the same taste as the ones in Japan'.

"The love for our product continues to propel our business forward," says Knibbs. "Tofoo had the best trading month ever in January 2023 and is one of only three brands growing both their four- and 12-week sales, outperforming the category. This strengthens our position as the No.4 brand within chilled meat-free, growing our share to



“The secret of Tofoo lies in three natural ingredients – soya beans water and nigari”

a record high of 8.1%, and as the leading tofu brand, with a 56%¹ share of the tofu segment,” he adds.

More is still to come, reveals Knibbs. “We’ve set a target for the tofu category to be worth £100m in five years’ time. So many people are yet to discover us and Tofoo will continue to hold its own as a core ingredient for cooks that want a brilliant natural alternative protein.”



The UK's No.1 Tofu



56% share of the tofu market*

*Nielsen NIQ 52w/e 26th March 2023

THIS

NPD drives THIS momentum

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THIS™ Isn't Streaky Bacon
THIS™ Isn't Pork Sausages
THIS™ Isn't Beef Burgers
THIS™ Isn't Mince
THIS™ Isn't Chicken Pieces
THIS™ Isn't Lamb Kebabs

THIS has established itself as the leading challenger brand in the category and, in the last 13 weeks grew by nearly 400k, the most of any company in chilled meat-free¹, as well as seeing its share grow to 5.6%, overtaking rivals Beyond Meat and Viverra in the process², says commercial director Jack Rutherford.

The brand also came top in Alantra's annual Fast 50, a ranking of the UK's fastest-growing food and drink companies³, he reveals.

"This is a huge outperformance vs. the category which declined by -11% year-on-year," he says. "For us, this was largely driven by new innovation, such as launching into beef alternatives as well as introducing our new THIS Isn't Streaky Bacon, and distribution gains."

Increased distribution

In June, the company launched three frozen SKUs into Sainsbury's – a category that has been dominated by heritage brands for too long, reveals Rutherford. "And we foresee more consumers shopping this aisle this year due to rising costs," he says.

"This month, we're also adding our already loved THIS Isn't Chicken Pieces to the range and increasing the distribution to more retailers. This will be followed by brand new THIS Isn't Lamb Kebabs joining our main chilled range. In addition, we launched into the food-to-go sector with WH Smith, and agreed a nationwide partnership with Greggs – which makes quality meat alternatives even easier to find."



Source
¹2 IRI, % Value Share, 13 w/e 22.01.23
³ Alantra Fast 50, based on two-year sales growth
⁴ IRI, Unit RoS, 3 w/e 22.01.23



“This month, we’re adding THIS Isn’t Chicken Pieces to the range and increasing distribution to more retailers. In addition, we launched into the food-to-go sector with WHSmith, as well as agreeing a nationwide partnership with Greggs”

Moving into beef alternatives

Within its main category, the company has entered into beef alternatives with THIS Isn't Beef Burgers and Mince, he adds. "During Veganuary, we introduced our groundbreaking THIS Isn't Streaky Bacon, which has quickly stolen the spot as the fastest-selling plant bacon⁴."

In terms of marketing during the past 12 months, THIS invested behind above-the-line communications. These included its largest Veganuary campaign so far, entitled 'Vegan bacon has never looked like THIS', which spanned social, in-store and OOH across four major cities, explains marketing director Dee Bulsara. "This is paired with our bold and humorous social media stunts, such as hanging a mock artwork in the Van Gogh Museum and creating an ice sculpture of Piers Morgan," she says. "Each month, we trick hundreds of consumers into thinking our products are real meat."

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Unilever – The Vegetarian Butcher

A brand bucking the trend

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KEY BRANDS

The Vegetarian Butcher

➔ The opportunity provided by the plant-based category shouldn't be overlooked by retailers. Although it has been a challenging year, the facts and figures just need to be put into perspective. The category has actually seen value growth of 7% over the last two years¹, due to people spending more time at home, as well as the ongoing trend for plant-based diets.

“That said, external factors such as the cost-of-living crisis have naturally taken their toll,” notes Georgina Bradford, marketing director nutrition at Unilever UKI. “Once inflation starts to subside, the category will continue to grow, as there is still a fundamental demand for plant-based products, with an increasing number of flexitarians.”

In fact, The Vegetarian Butcher has enjoyed a net two-year growth of 43%², while also recently surpassing the market by over 5%³ this Veganuary, she reveals. “Shoppers are still looking for great-quality meat alternatives that don't compromise on taste or texture. We are driving growth through long-term penetration and frequency of repeat purchases, which illustrates that we are really delivering on the taste front, and our unique butcher quality proposition sets us apart⁴.”

Innovation to drive the category

Even though plant-based chicken is already well developed, there is a clear opportunity to unlock more growth, adds Bradford. “The chicken category shows no sign of slowing down and is predicted to grow worldwide by 19% between 2020-2030⁵. With the right innovation, there is an opportunity for plant-based chicken to mirror this, and double category value in years to come⁶.

“This is why the brand has focused on perfecting the taste and texture with



“Shoppers are still looking for great-quality meat alternatives that don't compromise on taste or texture”

even more plant-based innovations recently. Since its launch in 2019, What The Cluck has gone from strength to strength and is now the No.1 branded plant-based chicken pieces in the chilled market⁴. What's more, the Impeckable Chicken Breast that launched last year is also the No.1 plant-based chicken breast⁷.”

New for shoppers, the brand has just launched Hentastic – a Southern Fried Chicken-style fillet with tender and juicy plant-based chicken coated in a golden and crunchy outer layer and packed with black pepper and spices. “Chicken is the No.1 protein type in the top animal meat dishes in the UK⁸,” she says. “So, we wanted to expand our range to offer a plant-based product that tastes as good – if not better than – its animal meat alternative.”

The future of plant-based

“Plant-based, one of the defining consumer trends of our time, isn't going anywhere, any time soon,” concludes Bradford. “Crucially, people still want plant-based options, so they can eat healthier and more sustainably. There is a huge opportunity to convert more flexitarians to the category and we are working closely with retailers to run activations in-store, including sampling, to promote our delicious products to shoppers.”

Source

^{1,2} Nielsen, Chilled meat alternatives based on latest three MAT ERSV to 26.02.23

³ Nielsen, 12 w/e 28.01.23. ERSV chilled meat alternatives market decline at -9.4% YoY vs The Vegetarian Butcher at -4.0% in the Grocery Multis

⁴ Kantar WPO, Total Grocers, 52 w/e, Previous Year, 22.01.22 and rolling prior periods

⁵ Encuest Annual Lifestyles Survey, European Commission – agricultural, Google Trends, Schouten

⁷ Nielsen, Value Sales L12 w/e 25.03.23

⁸ Kantar Usage GB, 52 w/e 29.01.20





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a key product that's growing the category.

1 Nielsen Value Sales L52w End 25.03.23. 2 Nielsen Value Sales L12w End 25.03.23. 3 Nielsen Grocery Multis 52 w/e MAT to 25.03.23



Violife Foods

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KEY PRODUCTS

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- Epic Mature Cheddar Flavour Block
 - Original Flavour Grated
 - Original Flavour Slices
 - Greek White Block
 - Le Rond Camembert Flavour
 - Smoky Cheddar Flavour Slices
 - Crumbly Blue

Vioblock
Viospread

Recent research conducted by Violife reveals that many consumers are interested in adopting more of a vegan diet, out of a desire to do better by the planet and themselves. However, they fear that this will mean having to miss out on their favourite foods, says Victoria Slater, head of Violife Northern Europe. “At Violife, we believe a plant-based diet doesn’t have to be one of ‘sacrifice’ but instead is one of ‘adding to’. 2023 will see the brand flip the narrative and highlight how a plant-based diet opens consumers up to a world of recipe opportunities and products that they can add into their weekly meal repertoire,” she says.

“Following a plant-based lifestyle means living life to the full; fundamental to our brand is the ethos that Violife’s delicious dairy-alternative products are 100% plant-based but are there to be enjoyed by everyone.”

The core Violife range of vegan alternatives to both cheese and butter (Vioblock and Viospread) is stocked by all major supermarkets, as well as smaller independent retailers, notes Slater. “This makes it easy for consumers to purchase the range as part of their weekly shop and incorporate Violife into their daily meal repertoire,” she says. “By consistently reviewing our portfolio strategy, we are able to offer consumers alternatives to all of their favourite cheese occasions, delivering great quality, 100% plant-based products.

“Violife’s innovative range of vegan alternatives caters for all dietary requirements and tastes. From options that favour convenience and hero classic flavours, such as Original Flavour Slices and Grated, which can easily be added to a sandwich or sprinkled on top of a



“Whatever shoppers are looking for, we want to ensure our portfolio is consumer-first and meets their needs”

jacket potato, to those looking for more exploratory flavours,” she explains. “This includes new Violife Crumbly Blue, which features unique spirulina ‘veins’ running through it to replicate a much-loved tangy blue cheese, or even our Smoky Cheddar Flavour Slices for a different take on a classic. For those looking for something more indulgent, Le Rond Camembert Flavour makes the perfect cheese board centrepiece for a special occasion. Whatever shoppers are looking for, we want to ensure our portfolio is consumer-first and meets their needs.

“Dispelling the myth that plant-based or vegan food will not taste or perform as well as its dairy-based counterparts, Violife’s product range both tastes and behaves like the real thing,” she adds. “It grates, melts and slices just like it should, so switching to Violife allows consumers to indulge in their favourite cheesy dishes, and discover new ones, the way they like it.

“2023 is an important year for us as we double down on our commitment, as category leader¹, to deliver new news and excitement. Our targeted marketing plan will make it easy and appetising for consumers to try plant-based cheese via exciting foodservice partnerships, educating and inspiring consumers on usage occasions and recipes, all supported by innovative NPD.”



Source
¹ Nielsen, 52 w/e 25.03.23

Violife

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