



PLANT-BASED FOOD IN THE UK

Market and Consumer Insights



ABOUT THE DATA

All data was generated as part of the Smart Protein project. Smart Protein is a €10-million, EU-funded project that seeks to develop a new generation of foods that is cost effective, resource efficient, and nutritious. Alternative protein sources such as legumes and side-streams of beer and pasta production are used to generate plant-based ingredients and plant-based meat, seafood, dairy products, and baked goods.

Smart Protein Pan-European Consumer Survey

The survey asked more than 7,500 people in the UK and nine other European countries about their attitudes towards the consumption of plant-based foods, their trust in relation to such products, their current consumption habits, the key drivers of their food choices, and various other relevant topics in the field of alternative protein.

The survey was carried out by Innova Market Insights in June 2020. Screener questions were established for age groups and gender, and only consumers who are responsible for household grocery shopping were surveyed. The results were published in two reports that you can download [here!](#)



ABOUT THE DATA



Smart Protein Plant-based Food Sector Report

This analysis is based on scanning data from Nielsen MarketTrack for the UK and 10 other European countries and covers six different plant-based products categories in each country, depending on availability (plant-based meat, fish, milk, yoghurt, cheese, and ice cream). The report shows sales values in Euros and sales volumes in kilograms or litres for the overall market, including discounters, as well as for discounters separately.

The data covers moving annual totals for Sep/Oct (depending on the country, between calendar weeks 39 and 42) 2018 vs 2019 vs 2020. This means that it presents the total sales values from October 2017 to September 2018, versus October 2018 to September 2019, versus October 2019 to September 2020. Download the full report [here!](#)

KEY INSIGHTS



Consumer profile

9% of UK consumers are plant-based eaters (vegan+vegetarian), which, after Germany, is the highest share of plant-based eaters in Europe. 23% identify as flexitarian.



Consumption of animal-based products

UK consumers most frequently consume milk (57% daily), followed by yoghurt (25% daily), and cheese (20% daily). In terms of meat, poultry is the most consumed (58% at least once a week).



Consumption of plant-based products

Looking at plant-based food, plant-based milk (26% at least once a week), plant-based beef (24% at least once a week), and plant-based poultry (23% at least once a week) are the most frequently consumed.



Plant-based meat and fish consumption

UK consumers specifically would like to find more plant-based chicken breasts (31%), sausages (29%), and minced meat (28%) in the supermarket. UK consumers specifically wish they could buy plant-based fish burgers (22%) and smoked salmon (20%).

The plant-based meat sector in the UK is the largest among the European countries analysed.



Plant-based dairy consumption

In terms of plant-based cheese, UK consumers would especially like to see plant-based sliced cheese (38%) and plant-based mozzarella (36%) available in supermarkets.

The plant-based dairy sector is smaller than the plant-based meat sector in the UK, but growth rates are higher for plant-based milk and plant-based cheese.



Plant-based baked goods

If taste and texture of plant-based baked goods were the same of conventional baked goods, 30% of UK consumers are likely to purchase plant-based baked goods regularly. Sales value for plant-based baked goods increased steadily.



Preferred ingredients for plant-based foods

Potatoes (37%), rice (34%), and mushrooms (31%) are UK consumers favourite core ingredients in plant-based foods.

Q1

Which category best describes your current dietary lifestyle?

9% of UK consumers are plant-based. 23% (flexitarians) are reducing their meat consumption.

Omnivore

I frequently eat meat, such as beef, pork, chicken, turkey, fish and/or shellfish

Flexitarian

I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead

Pescetarian

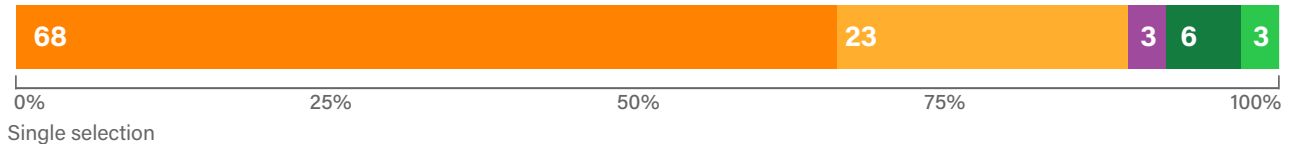
I eat fish and/or shellfish, but no other types of meat

Vegetarian

I don't eat meat and fish of any kind, but I do eat eggs and/or dairy products

Vegan

I don't eat meat, fish, eggs, dairy products, or any other animal-based ingredients



Q2

How long have you been following your current dietary lifestyle?

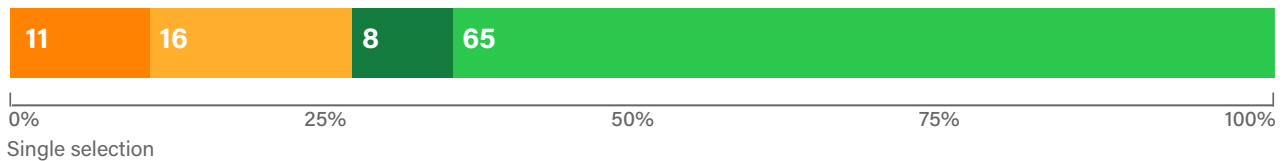
65% of consumers from the UK have been following their current diet lifestyle for more than 5 years.

Less than six months

6 months to 2 years

2 to 5 years

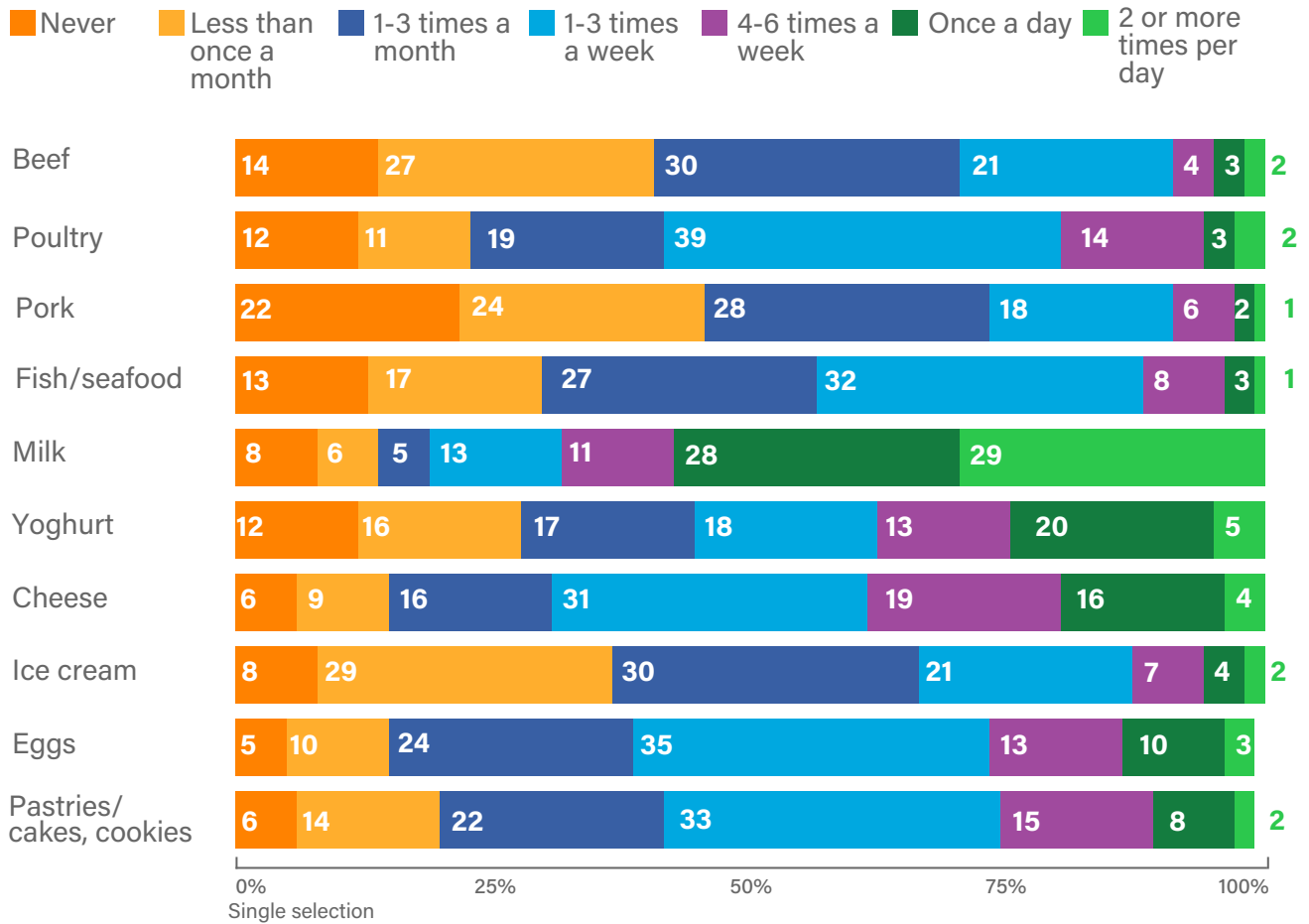
More than 5 years



Q3

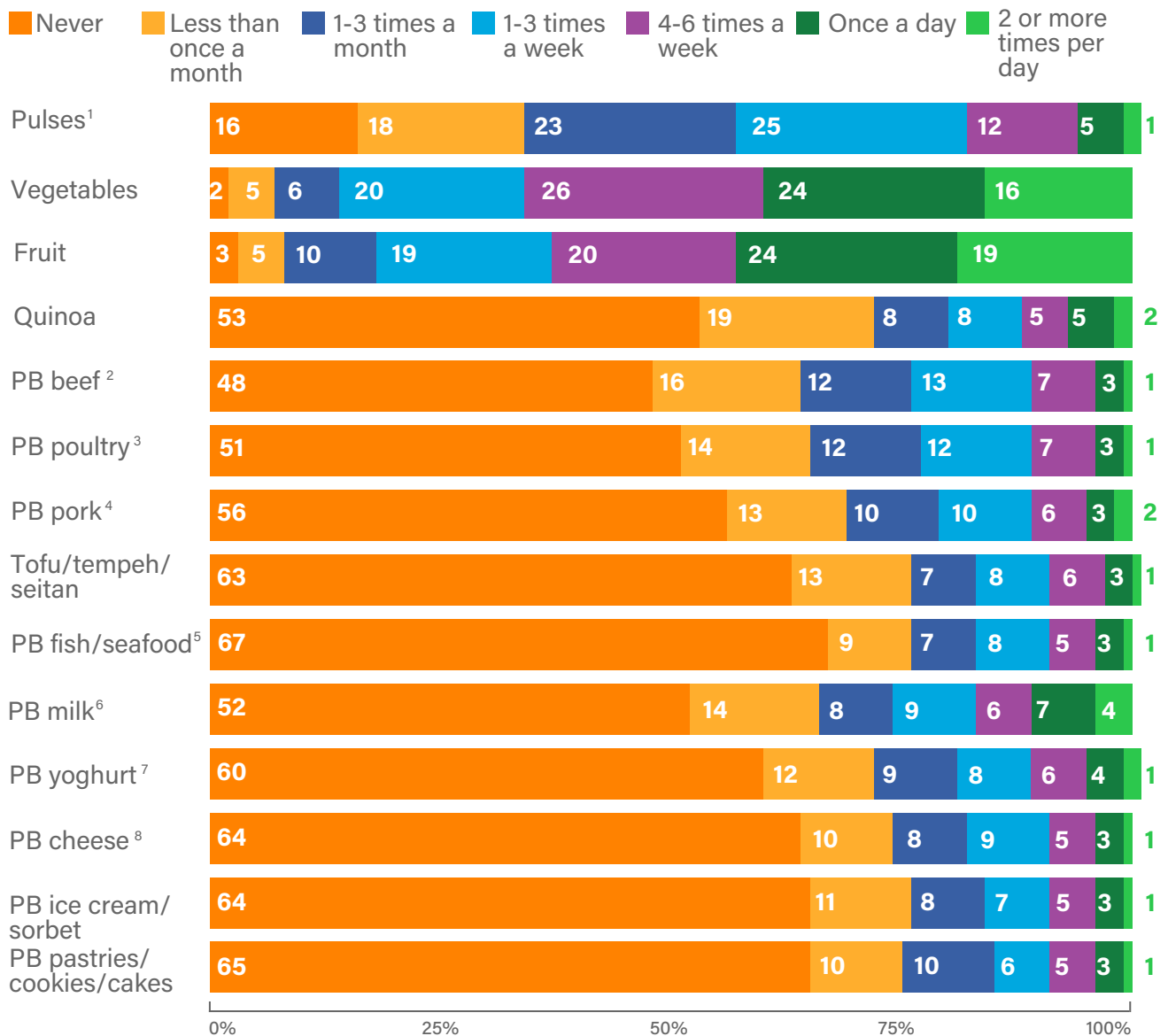
Which statement best describes how frequently you have consumed the following foods in the last 12 months? (1/2)

UK consumers eat milk the most frequently, followed by milk, yoghurt, and pastries, cakes, and cookies.



Q3

Which statement best describes how frequently you have consumed the following foods in the last 12 months? (2/2)

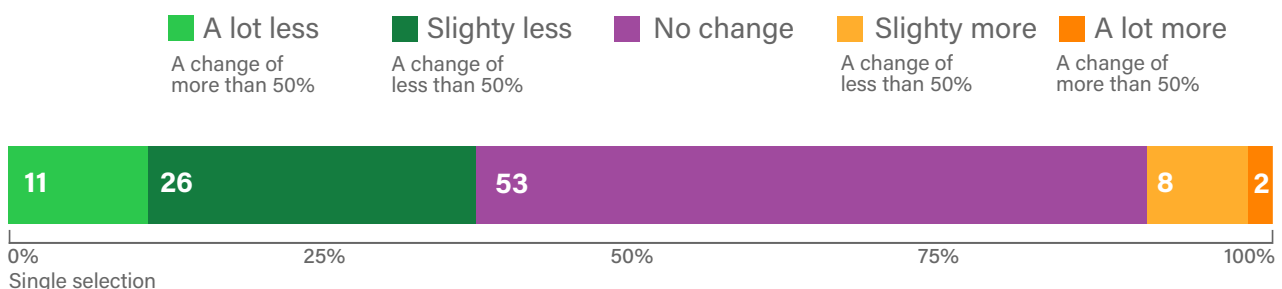


Single selection | PB = Plant-based | Examples: 1: lentils, beans 2: PB burger/mince 3: PB chicken strips/chunks 4: PB sausage/ pulled pork 5: PB fish sticks/fish burger/tuna 6: soya almond/oat/coconut/rice/pea milk 7: soya/almond/oat/ coconut yoghurt 8: PB cream cheese/cheese slices/grated cheese

Q4

Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now?

37% of UK consumers now eat less meat compared to a year ago.



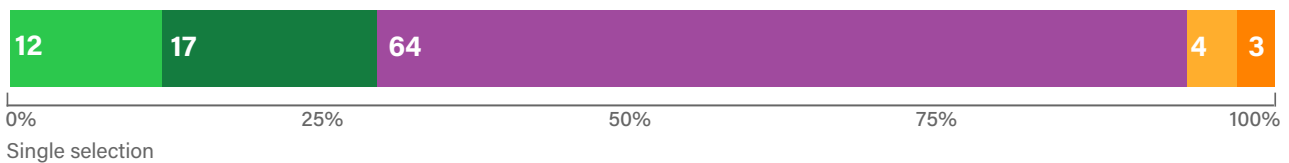


Q5 Do you intend increasing or reducing your consumption of the following food categories in the next six months?

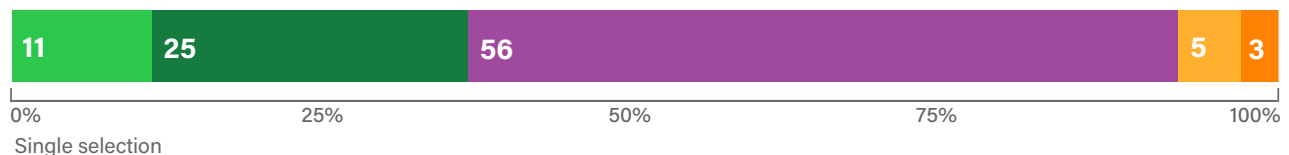
Nearly 36% of UK consumers intend to reduce their meat consumption in the next six months. 29% plan on consuming less dairy.

■ I will consume less ■ I will consume a little less ■ I will consume about the same ■ I will consume a little more ■ I will consume more

a Dairy products (e. g. milk, yoghurt, cheese)



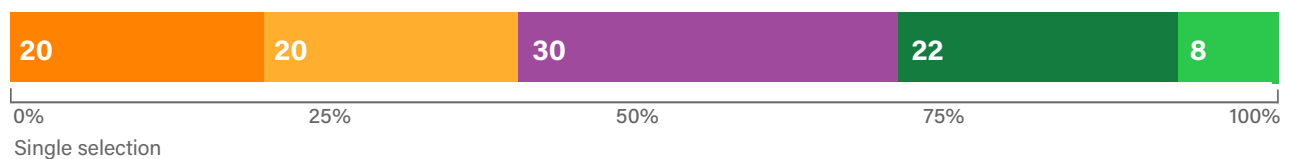
b Meat products (e. g. beef, pork, chicken)



Q6 How important is an organic label for you when it comes to plant-based food products (e.g. meat/dairy alternatives)

30% of UK consumers think an organic label is important when it comes to plant-based food products.






■ Not important at all ■ Somewhat unimportant ■ Neither important nor unimportant ■ Somewhat important ■ Very important



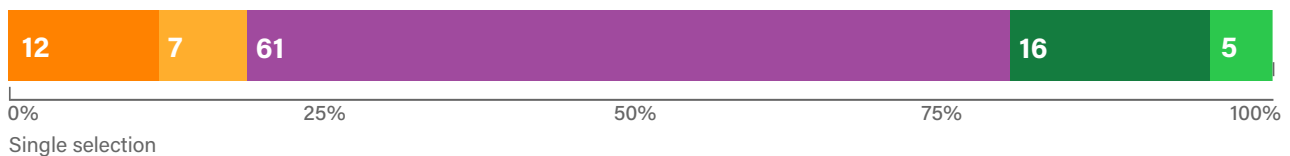
Q7

Do you intend increasing or reducing your consumption of the following plant-based food categories in the next six months?

21% of UK consumers intend to consume more plant-based dairy products in the next six months.

 I will consume less
  I will consume a little less
  I will consume about the same
  I will consume a little more
  I will consume more

a Plant-based dairy products (e. g. soya/oat milk, coconut yoghurt)



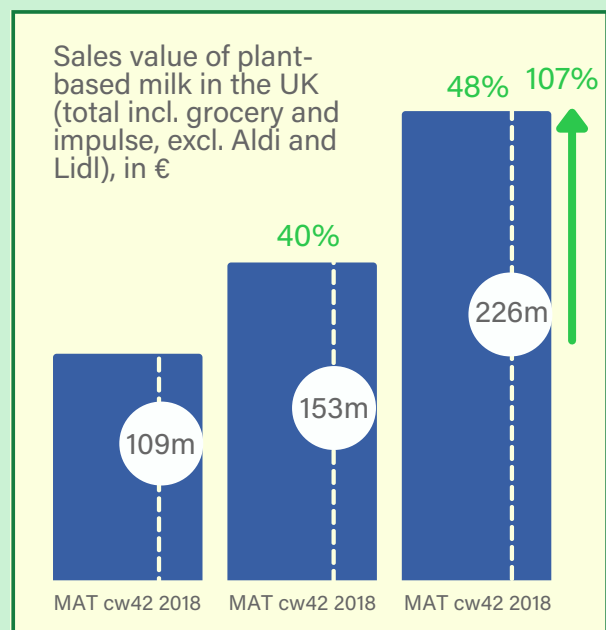
Plant-based dairy

The UK has the fastest growing plant-based-milk sector (€396m) of the countries analysed.

The plant-based cheese sector in the UK is still small (€4.7m) but growing (38% in MAT cw42 2020, 165% over two periods).

Plant-based-yoghurt sales in the UK amounted to €15m in MAT cw42 2020, an increase of 16% to the previous period and increase of 27% over two periods.

The plant-based cheese sector in the UK experienced triple-digit growth of 165% over the two periods, with 93% and 38% respectively.








Sales value of plant-based cheese increase from €1.8m in MAT cw42 2018 to €4.7m in MAT cw42 2020.

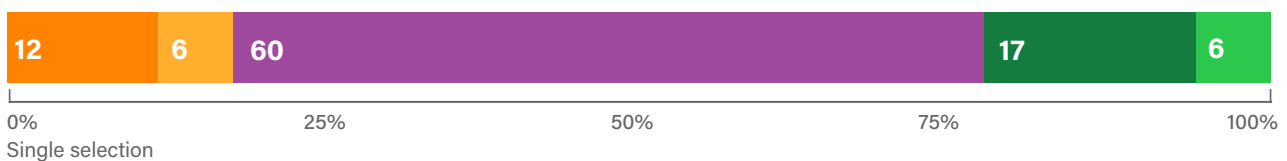
Q7

Do you intend increasing or reducing your consumption of the following plant-based food categories in the next six months?

23% of UK consumers intend to consume more plant-based meat products in the next six months.

 I will consume less
  I will consume a little less
  I will consume about the same
  I will consume a little more
  I will consume a little more

b Plant-based meat products (e. g. plant-based burgers/sausages)

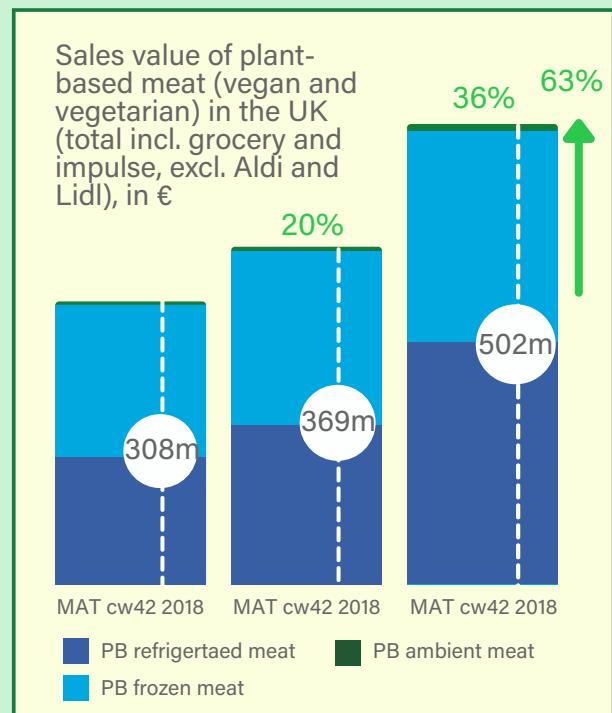


Plant-based meat

The plant-based meat sector in the UK is the largest among the 11 European countries analysed.

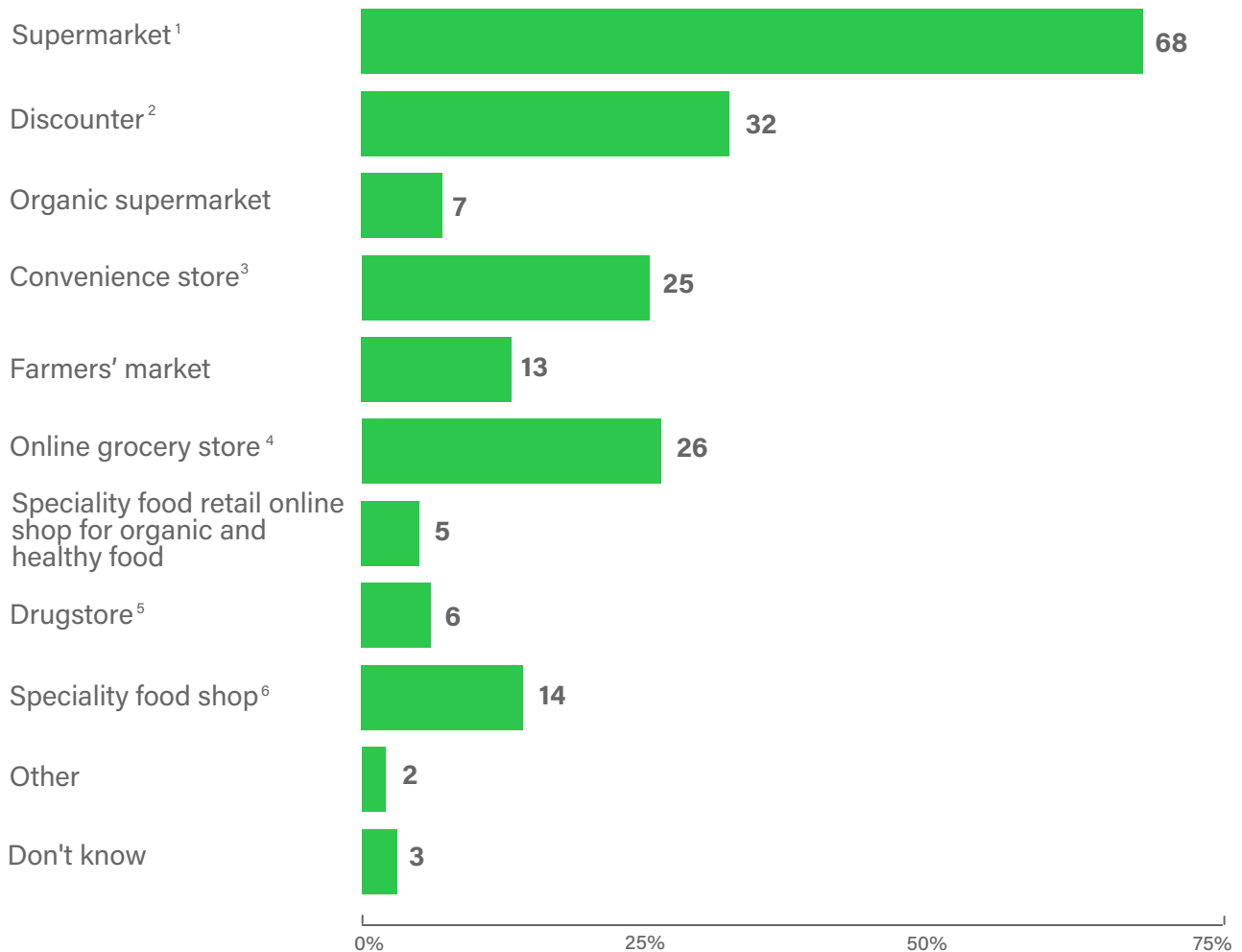
Sales of refrigerated plant-based meat (€264m) in the UK grew faster than plant-based frozen meat (€231m), with 51% and 22% respectively in the last period.

The sector is dominated by plant-based sausages, frozen burger patties and cold cuts.



**Q8****Where are you likely to purchase food products most frequently from in the future?**

UK consumers prefer supermarkets, discount stores, and online grocery stores for grocery shopping.



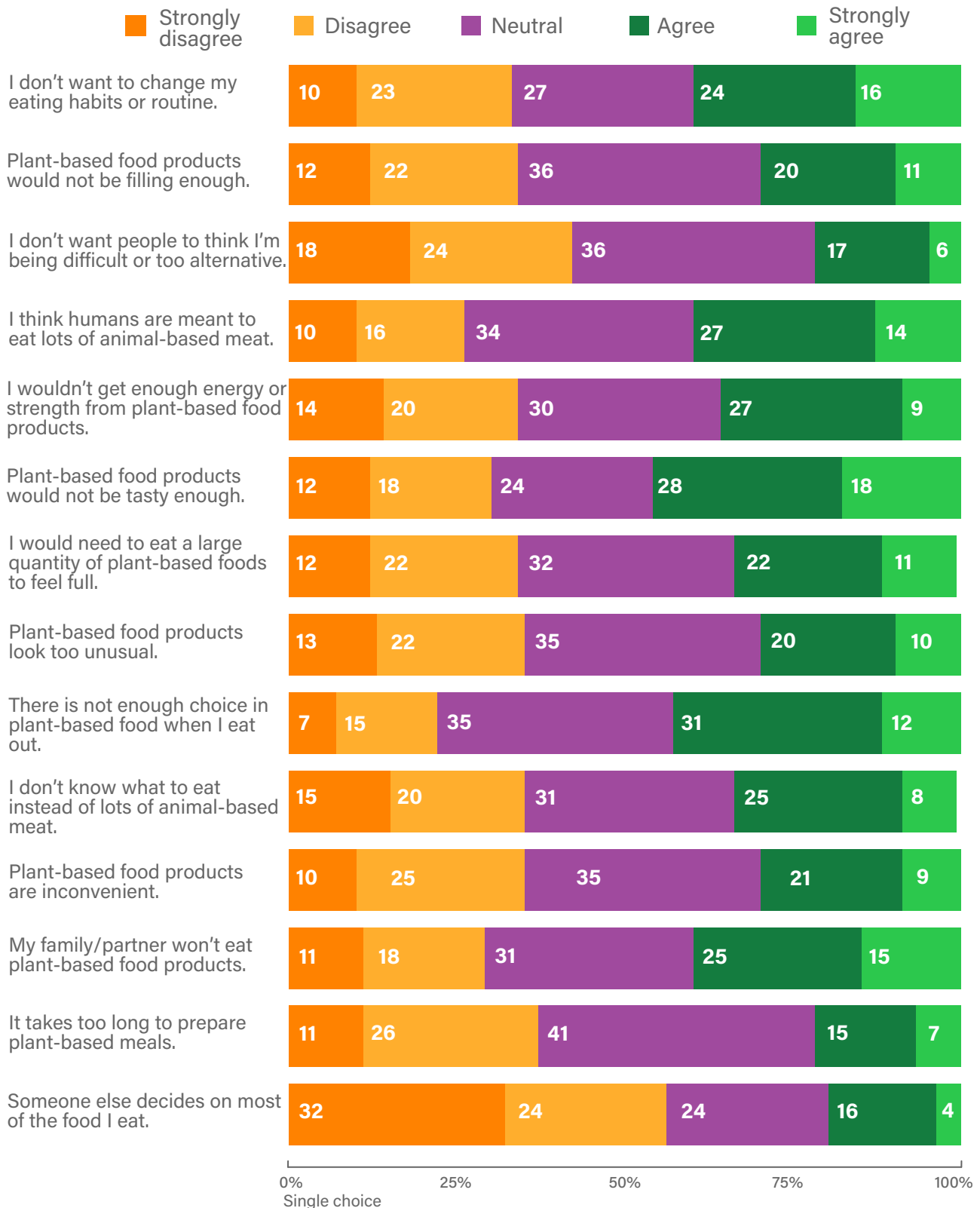
Multiple choice | Max. 3

Examples: 1: Tesco 2: Aldi, Lidl 3: Co-op 4: Ocado 5: Boots, Superdrug 6: bakery

Q9

Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? (1/2)

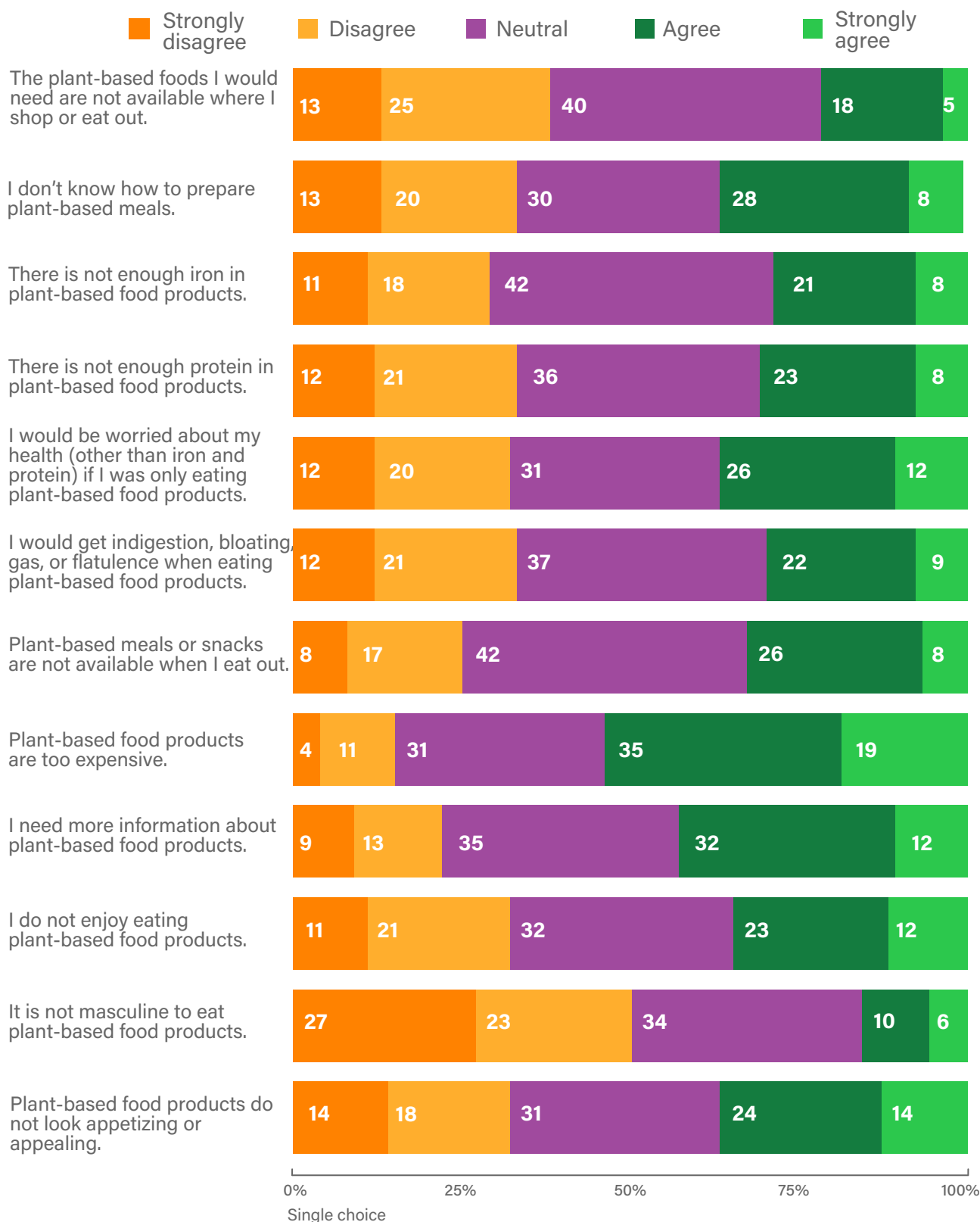
The key barriers towards plant-based products for UK consumers are lack of taste, and choice.



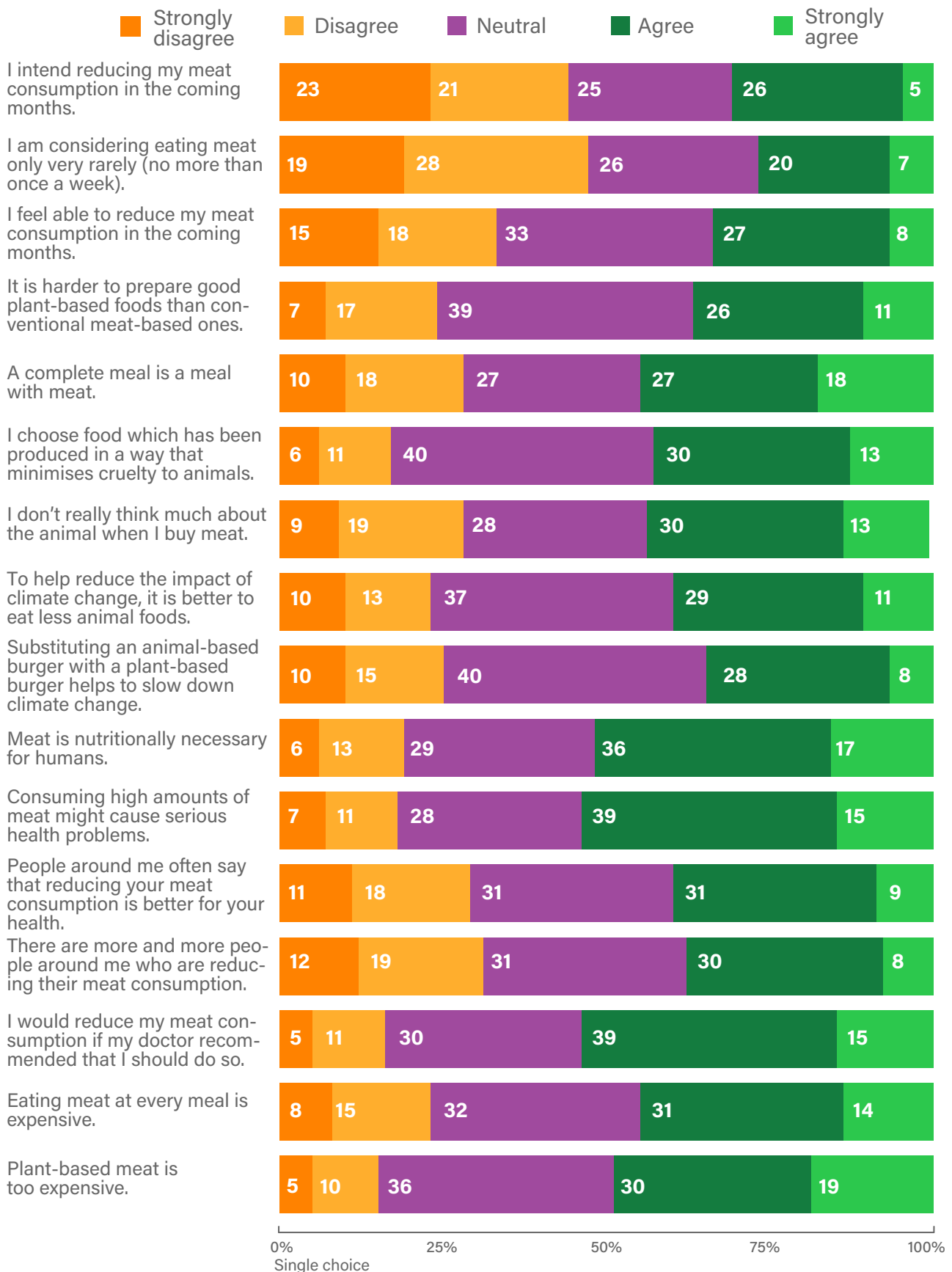
Q9

Please indicate how much you disagree or agree with each of the following statements with regards to barriers towards eating new plant-based food products and following a plant-based diet? (2/2)

UK consumers say that plant-based food products are too expensive and that they need more information about it.



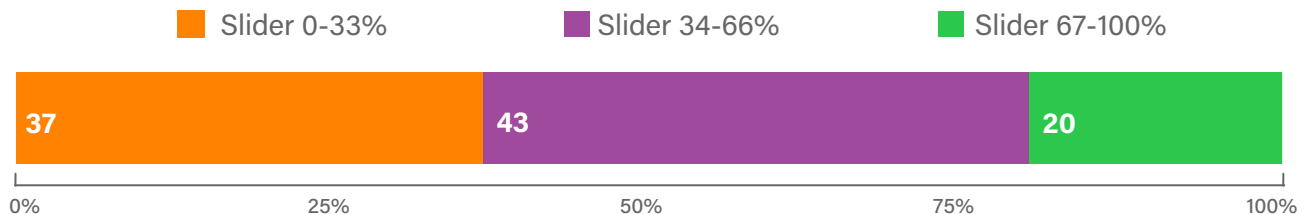
Q10 Please indicate how much you disagree or agree with each of the following statements concerning your assumptions about meat or plant protein?





Q11 To what extent do you eat plant-based meat products (e. g. plant-based burger patties/nuggets) instead of conventional meat products?

More and more UK consumers eat plant-based meat products instead of conventional meat products.

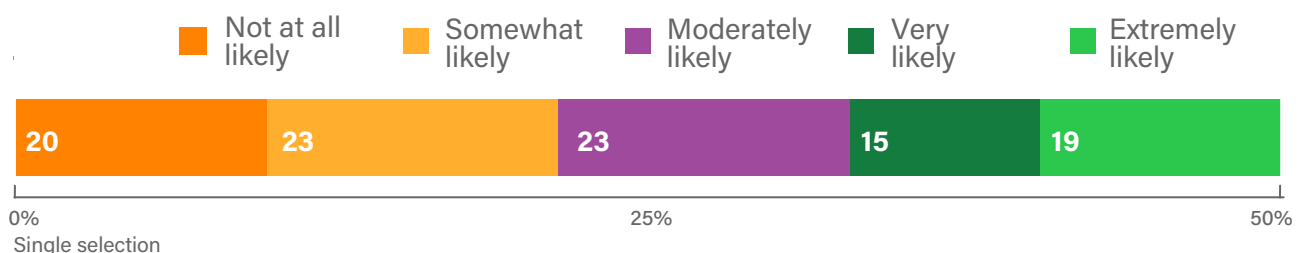


Only people who eat plant-based meat answered this question.

Slider: 0% (I always eat conventional cheese products) - 100% (I always eat plant-based cheese products)

Q12 Imagine that plant-based meat has become widely available, tasty and affordable at grocery stores, restaurants, butchers, and markets. How likely are you to try plant-based meat?

34% of UK consumers are likely to try plant-based meat.



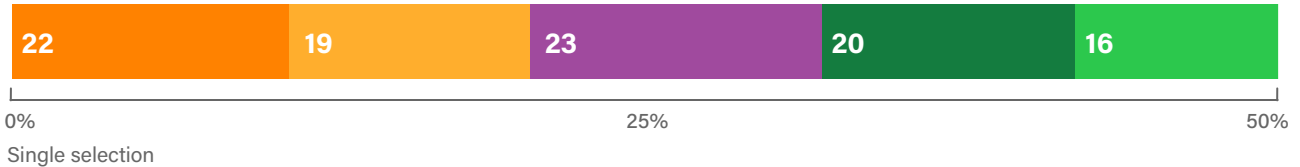
0%
Single selection

Q13 Imagine that you've had the opportunity to try a plant-based meat that has the identical taste and texture as animal-based meat.

Not at all likely Somewhat likely Moderately likely Very likely Extremely likely

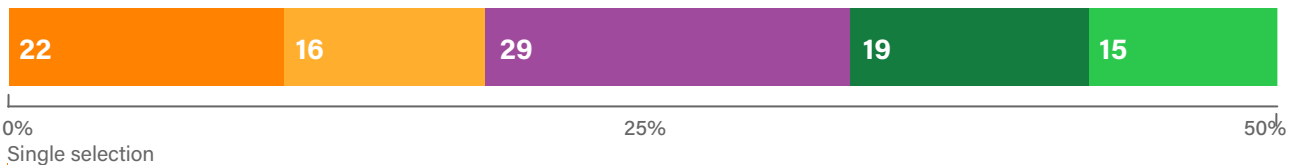
a How likely are you to eat plant-based meat instead of animal-based meat?

36% of UK consumers are likely to eat plant-based instead of animal-based.



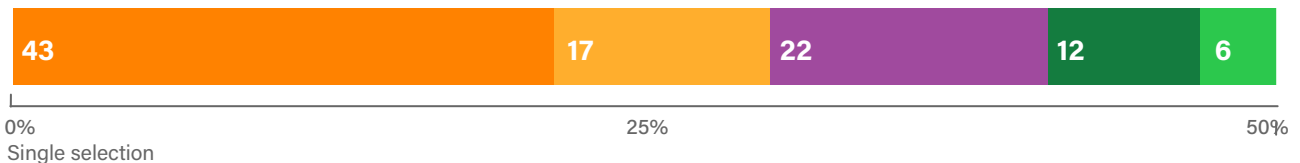
b How likely are you to purchase plant-based meat regularly?

34% of UK consumers are likely to purchase plant-based meat regularly.



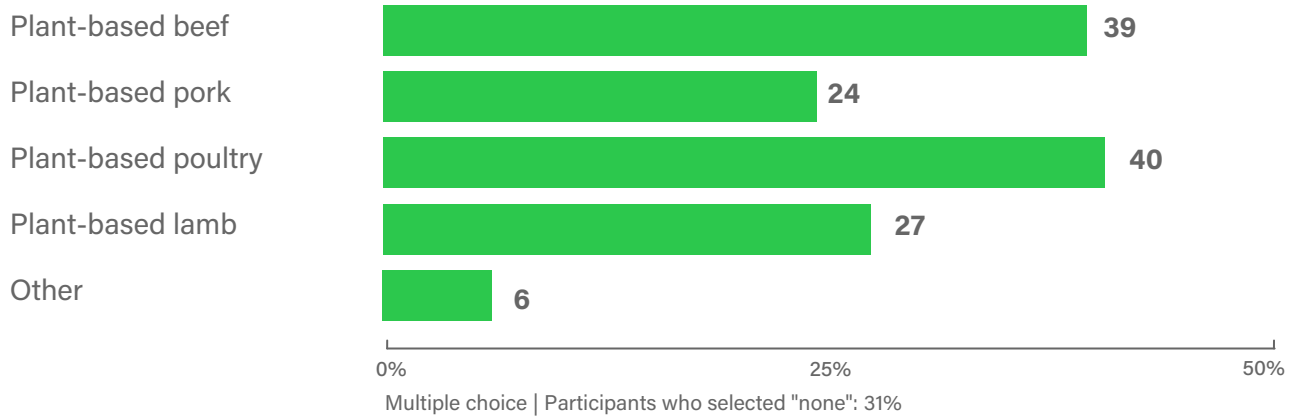
c How likely are you to pay a higher price for plant-based than for animal-based meat?

18% of UK consumers are likely to pay a higher price for plant-based than for animal-based meat.



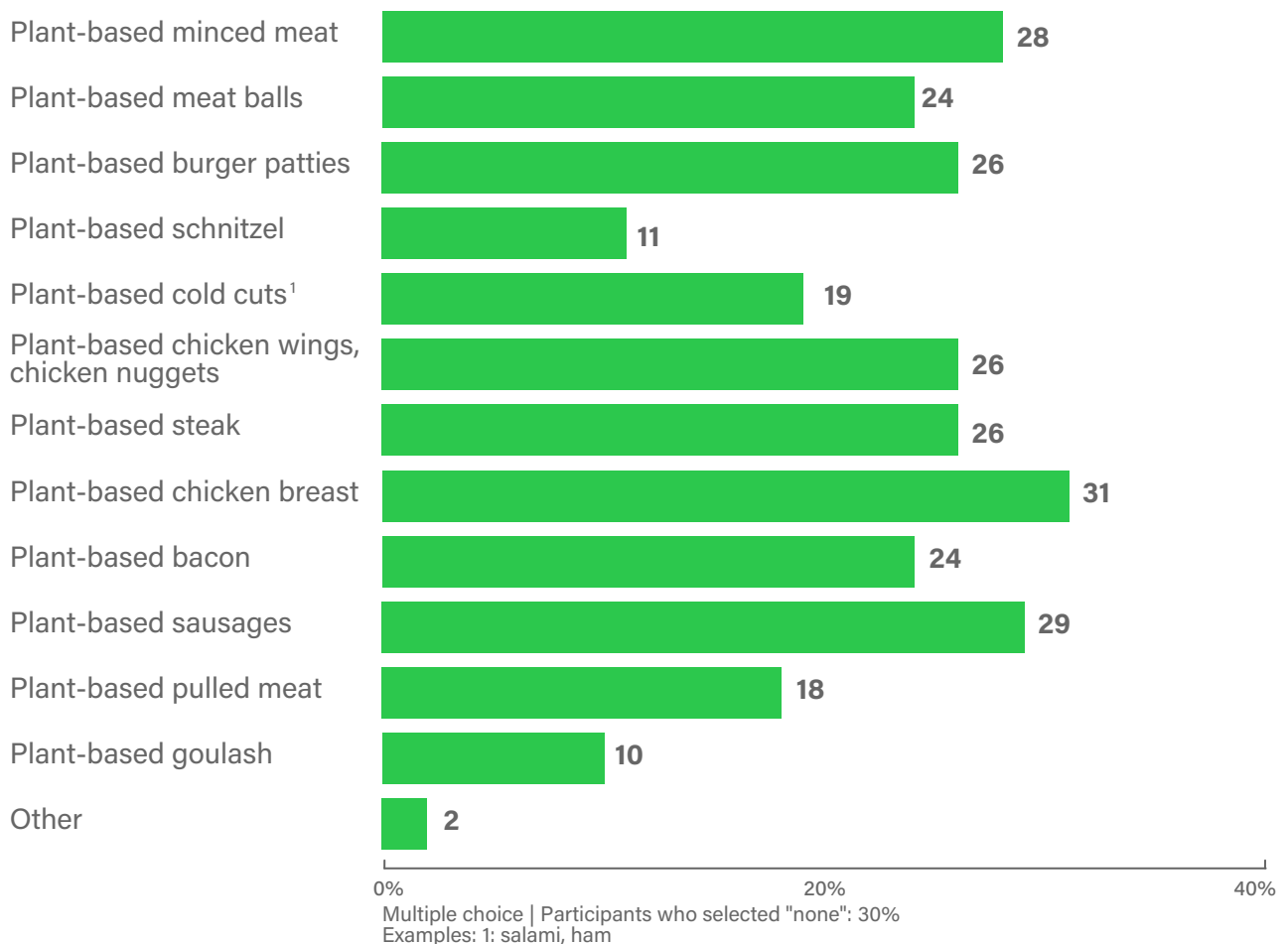
Q14 What kind of plant-based meat do you wish you could buy in the supermarket? Please select all the options that apply.

UK consumers show a high demand for plant-based poultry and beef products.



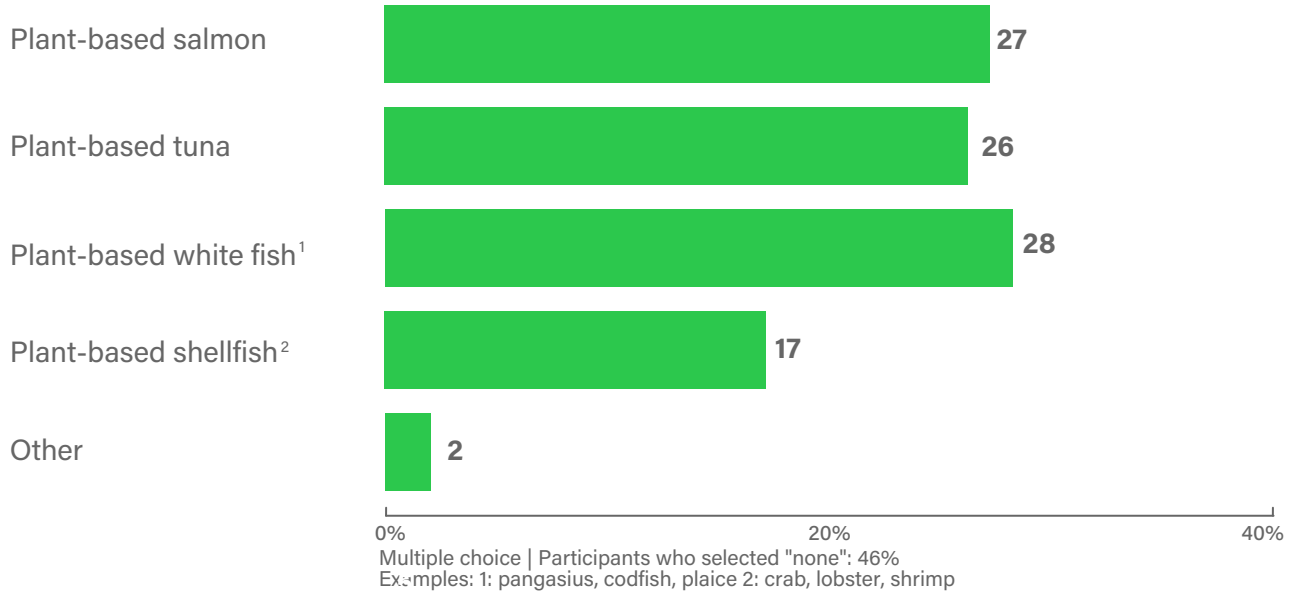
Q15 Specifically, what kind of plant-based meat products do you wish you could buy in the supermarket? Please select all the options that apply.

UK consumers wish to buy plant-based chicken breasts, sausages, and minced meat.



Q16 What kind of plant-based fish do you wish you could buy in the supermarket? Please select all the options that apply

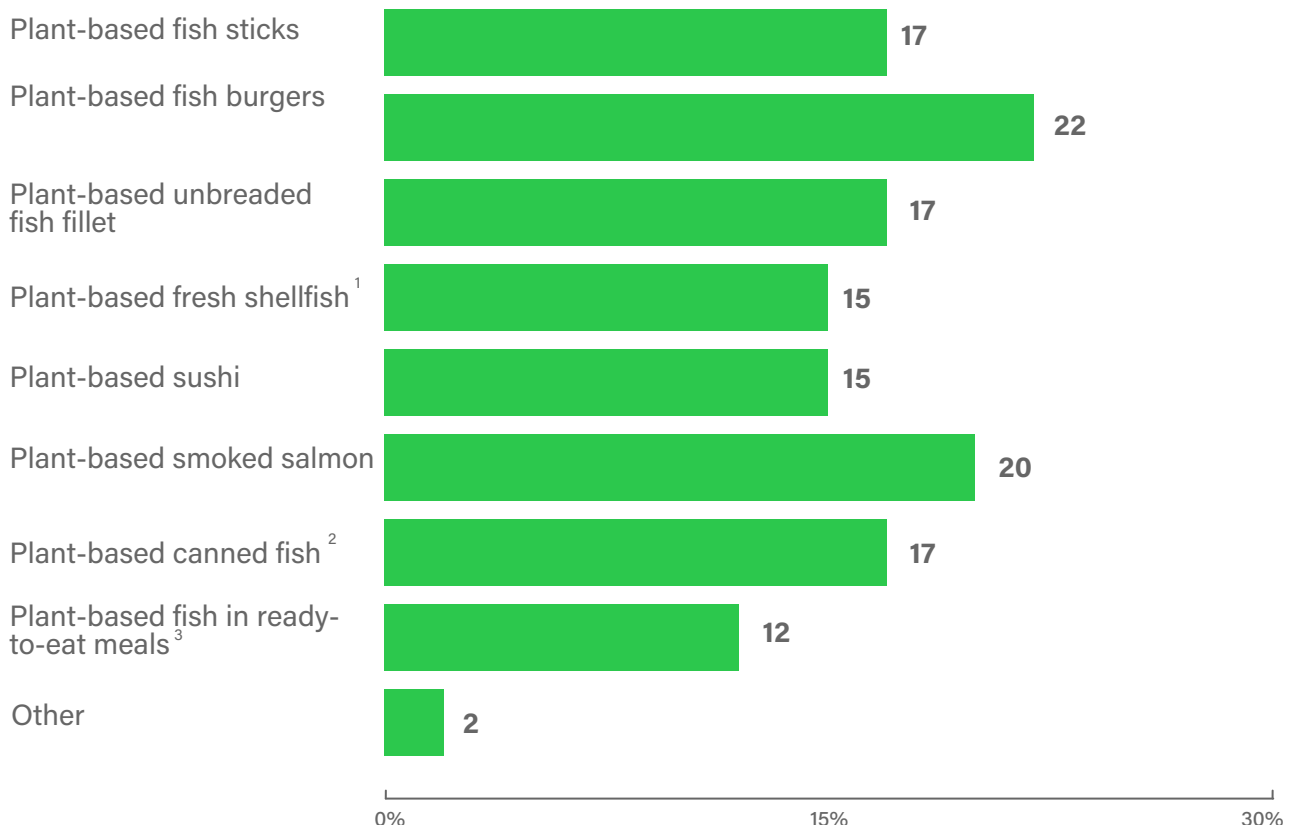
In the UK, plant-based white fish is the most asked-for plant-based fish alternative.





Q17 Specifically, what kind of plant-based fish products do you wish you could buy in the supermarket? Please select all the options that apply.

UK consumers would like to see plant-based fish burgers, and smoked salmon in supermarkets.



Multiple choice | Participants who selected "none": 47%

Examples: 1: lobster, scallop, shrimp 2: canned tuna 3: pasta with clams

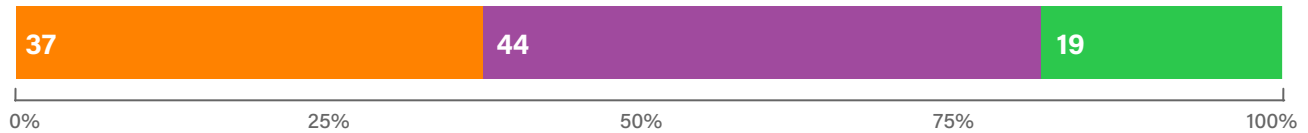
Q18 To what extent do you eat plant-based cheese products (e. g. plant-based sliced cheese/grated cheese) instead of conventional cheese products?

More and more UK consumers eat plant-based cheese products instead of conventional cheese products.

Slider 0-33%

Slider 34-66%

Slider 67-100%



Only people who eat plant-based cheese answered this question.

Slider: 0% (I always eat conventional cheese products) - 100% (I always eat plant-based cheese products)

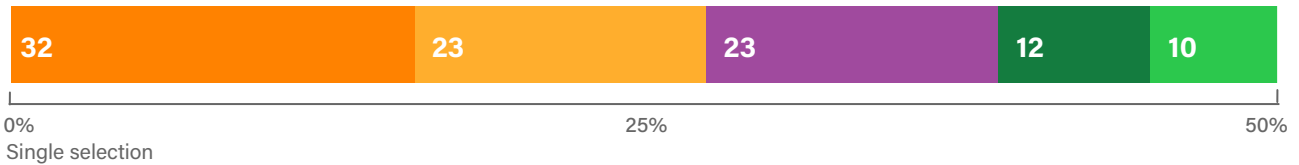


Q19 Imagine that you've had the opportunity to try plant-based cheese products, and the taste and texture were identical to conventional cheese products.

Not at all likely Somewhat likely Moderately likely Very likely Extremely likely

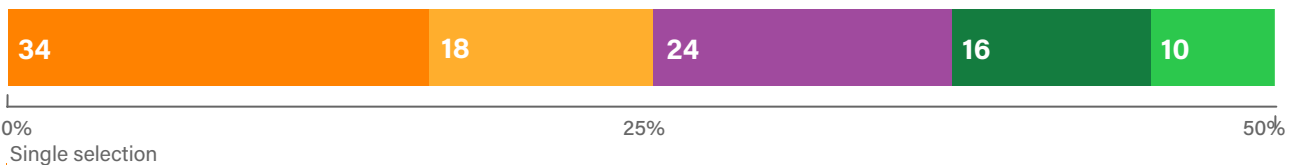
a How likely are you to eat plant-based cheese products instead of conventional cheese products?

22% of UK consumers are likely to eat plant-based cheese instead of conventional cheese.



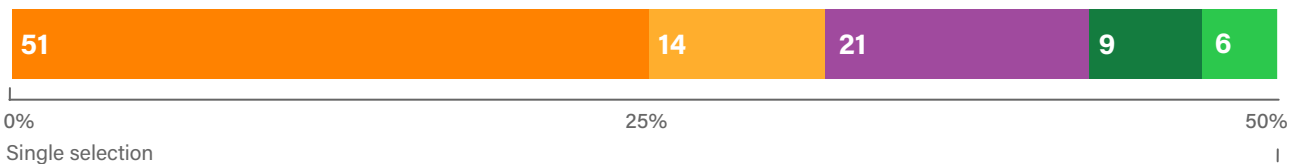
b How likely are you to purchase plant-based cheese products regularly?

26% of UK consumers are likely to purchase plant-based cheese regularly.



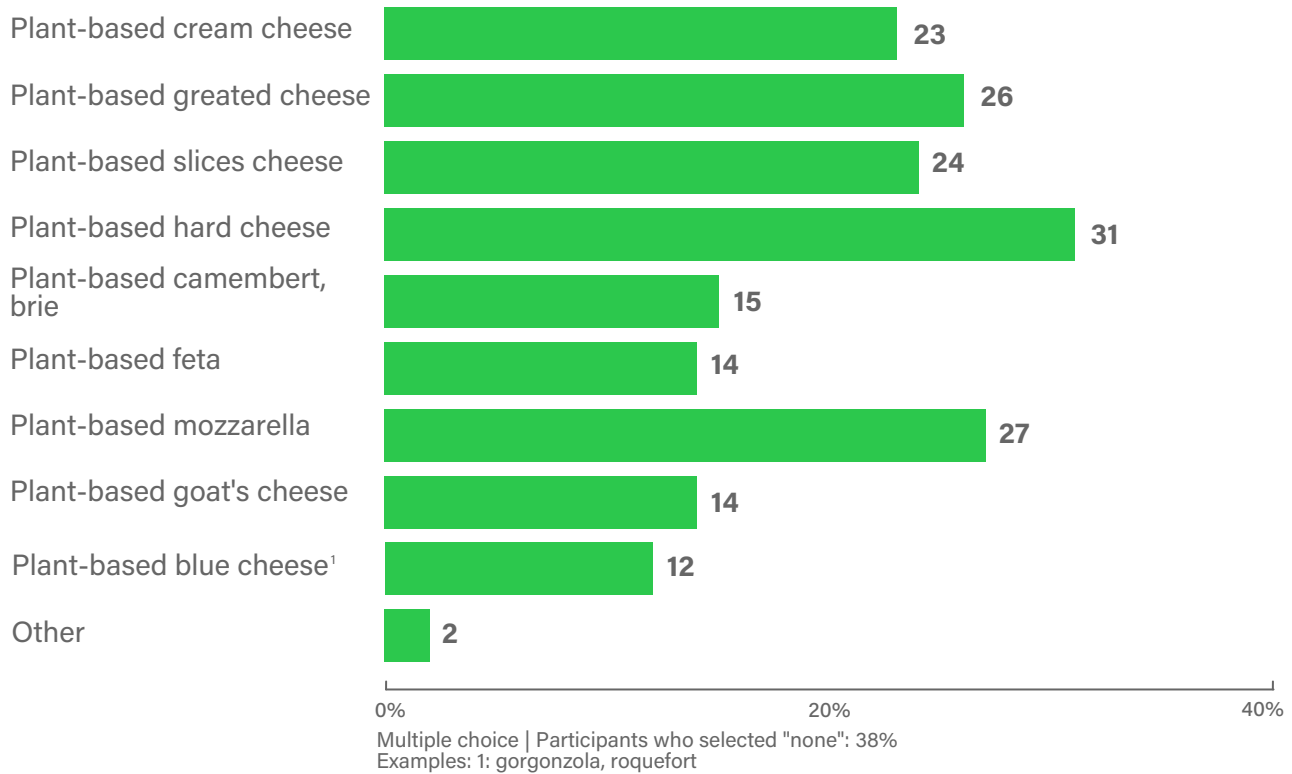
c How likely are you to pay a higher price for plant-based cheese products than for conventional cheese products?

15% of UK consumers are likely to pay a higher price for plant-based cheese.



Q20 What kind of plant-based cheese products do you wish you could buy in the supermarket? Please select all the options that apply.

UK consumers show high demand for plant-based cream cheese, sliced cheese, and mozzarella.





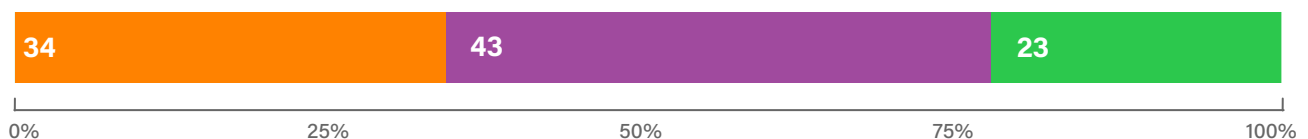
Q21 To what extent do you eat vegan baked goods (e. g. bread or cookies made without eggs or butter) instead of conventional baked goods?

More and more UK consumers eat vegan baked goods instead of conventional baked goods.

Slider 0-33%

Slider 34-66%

Slider 67-100%

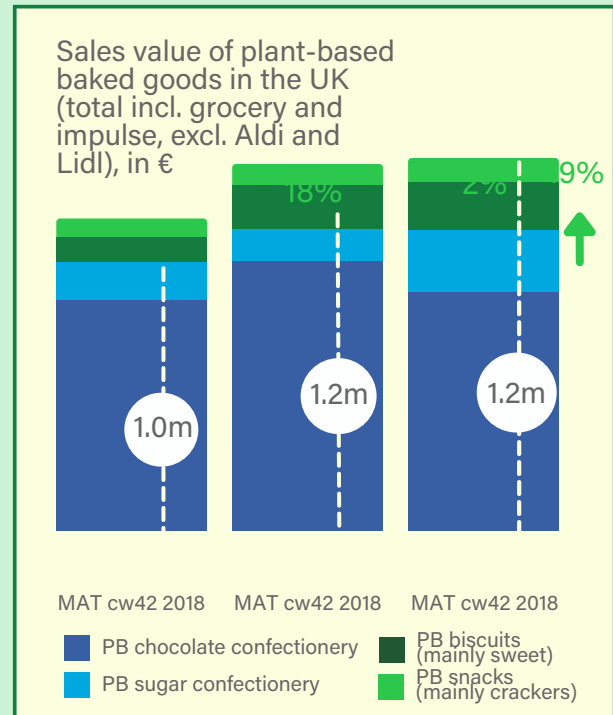


Only people who eat plant-based pastries/cakes/cookies answered this question.
Slider: 0% (I always eat conventional baked goods) - 100% (I always eat vegan baked goods)

Plant-based baked goods

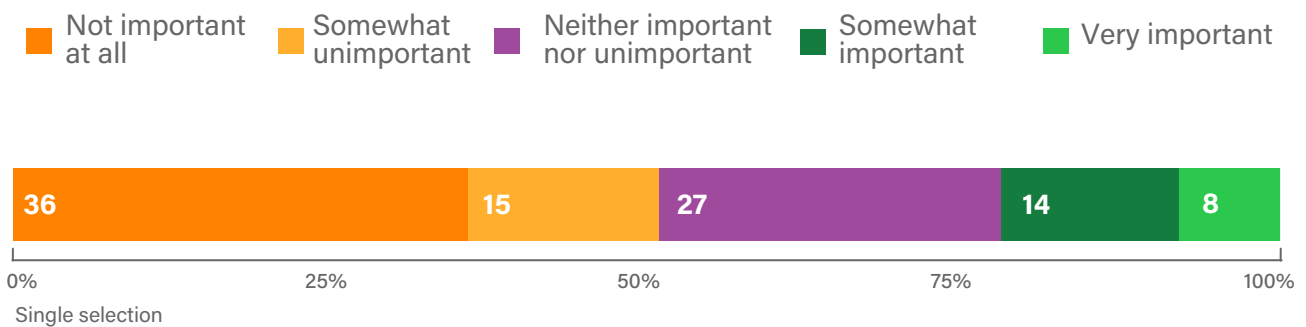
The plant-based baked goods sector in the UK also experienced growth, mainly in the first period.

The sector is largely dominated by plant-based chocolate confectionery, although plant-based sugar confectionery and plant-based biscuits experienced the strongest sales increase.



Q22 How important is it for you that baked goods (e. g. bread or cookies) exclude animal-based ingredients such as eggs or butter?

UK consumer think baked goods should exclude animal-based ingredients.

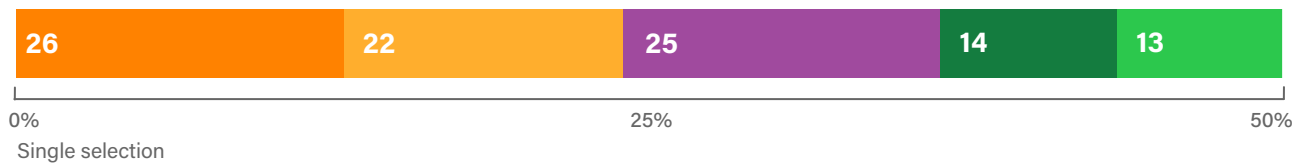


Q23 Imagine that you've had the opportunity to try vegan baked goods (e. g. bread or cookies made without eggs or butter) with exactly the same taste and texture as conventional baked goods.

Not at all likely Somewhat likely Moderately likely Very likely Extremely likely

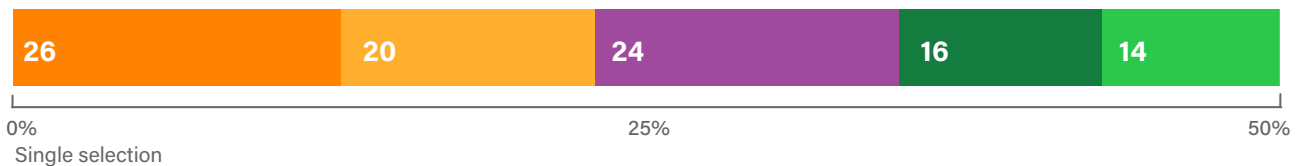
a How likely are you to eat vegan baked goods instead of conventional baked goods?

27% of UK consumers are likely to eat vegan instead of conventional baked goods.



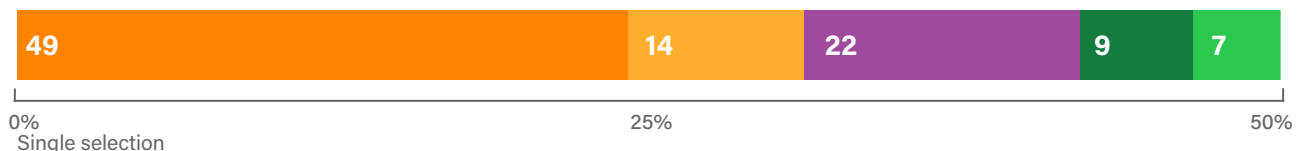
b How likely are you to purchase vegan baked goods regularly?

30% of UK consumers are likely to purchase vegan baked goods regularly.

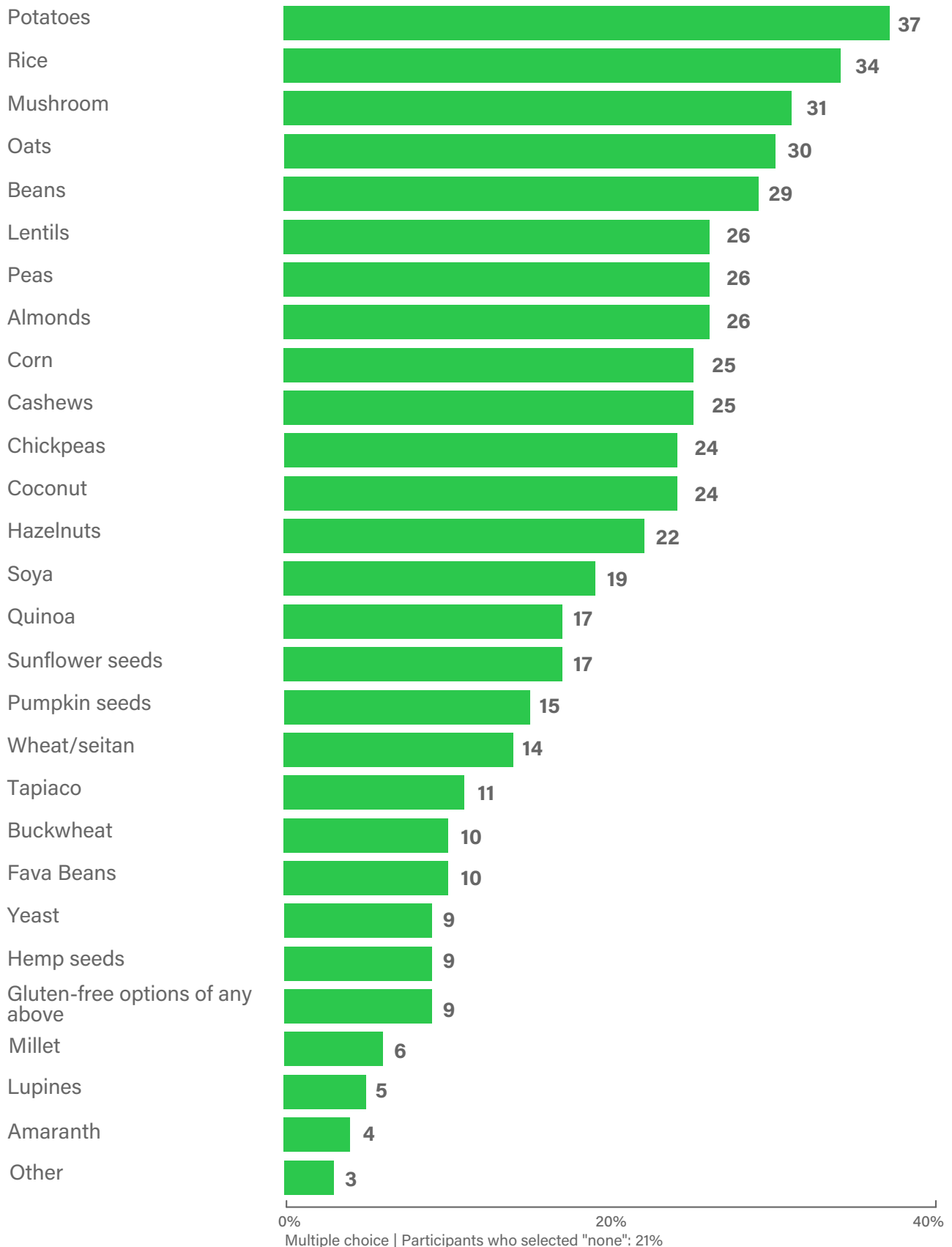


c How likely are you to pay a higher price for vegan baked goods instead of conventional baked goods?

16% of UK consumers are likely to pay a higher price for vegan baked goods.

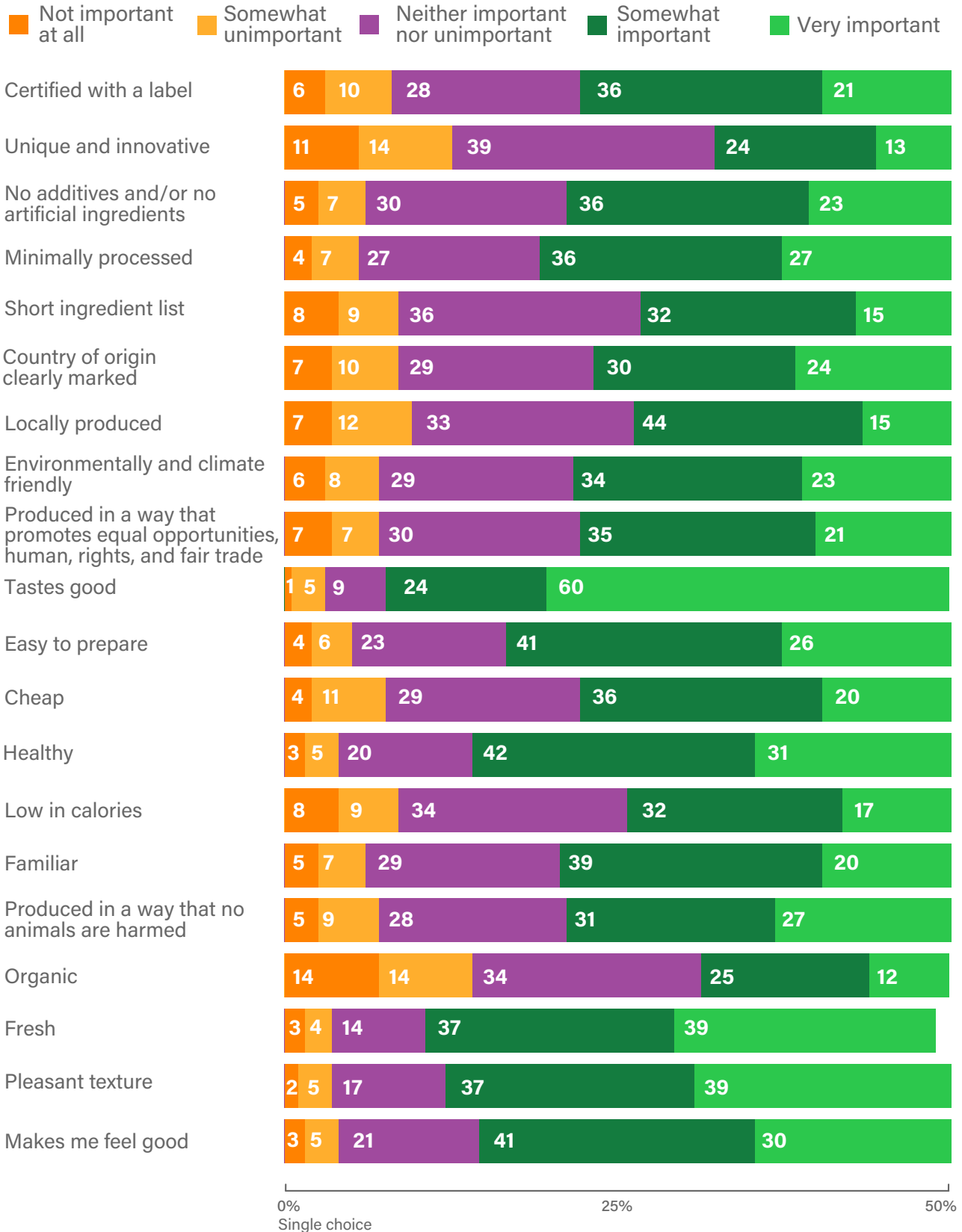


Q24 Which of the following would you like to have as a main ingredient in plant-based food? Please select all that apply.

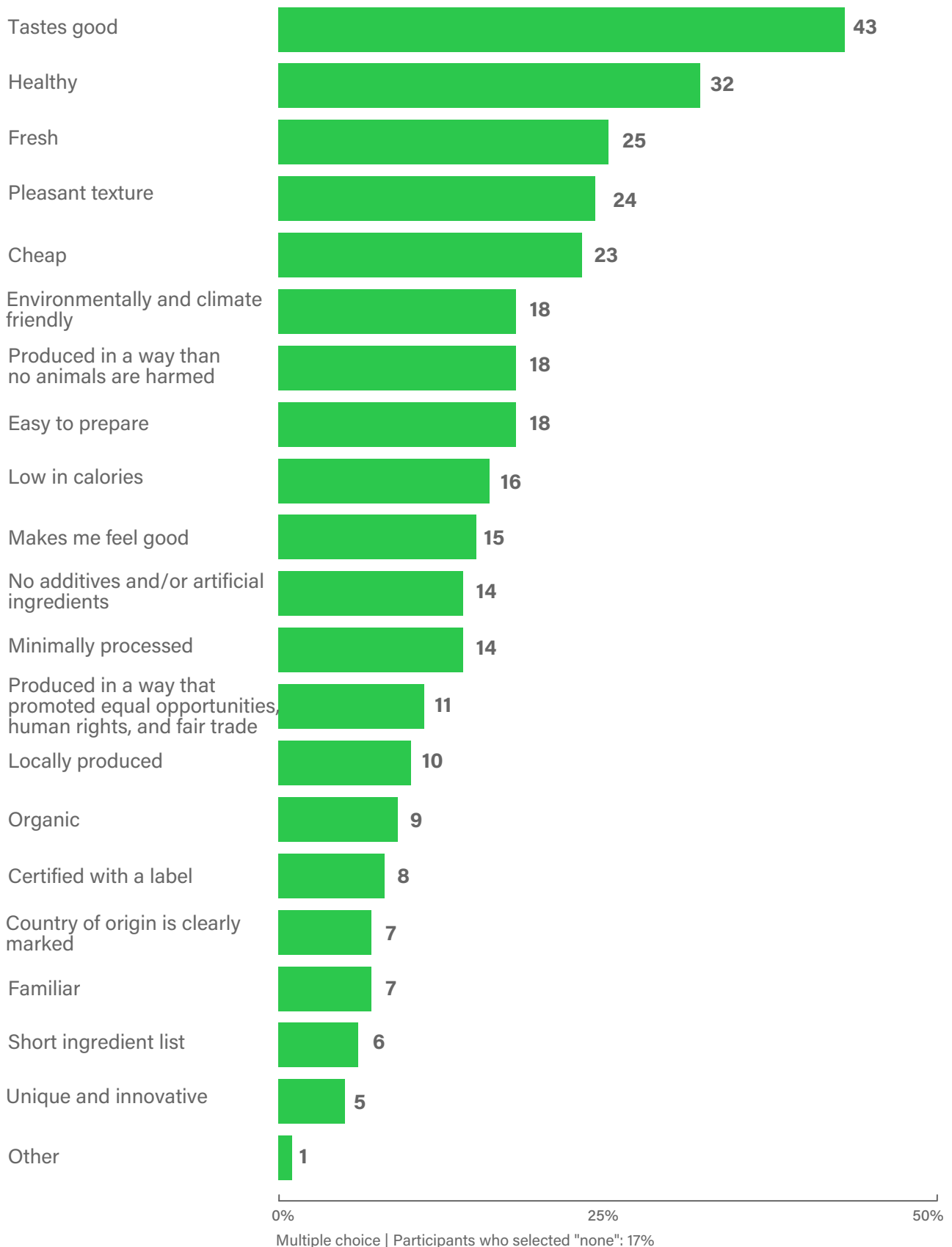


Q25 What factors are important for you when choosing a food product? It is important to me that the food product I choose....:

UK consumers rate good taste and freshness as most important when choosing a food product.



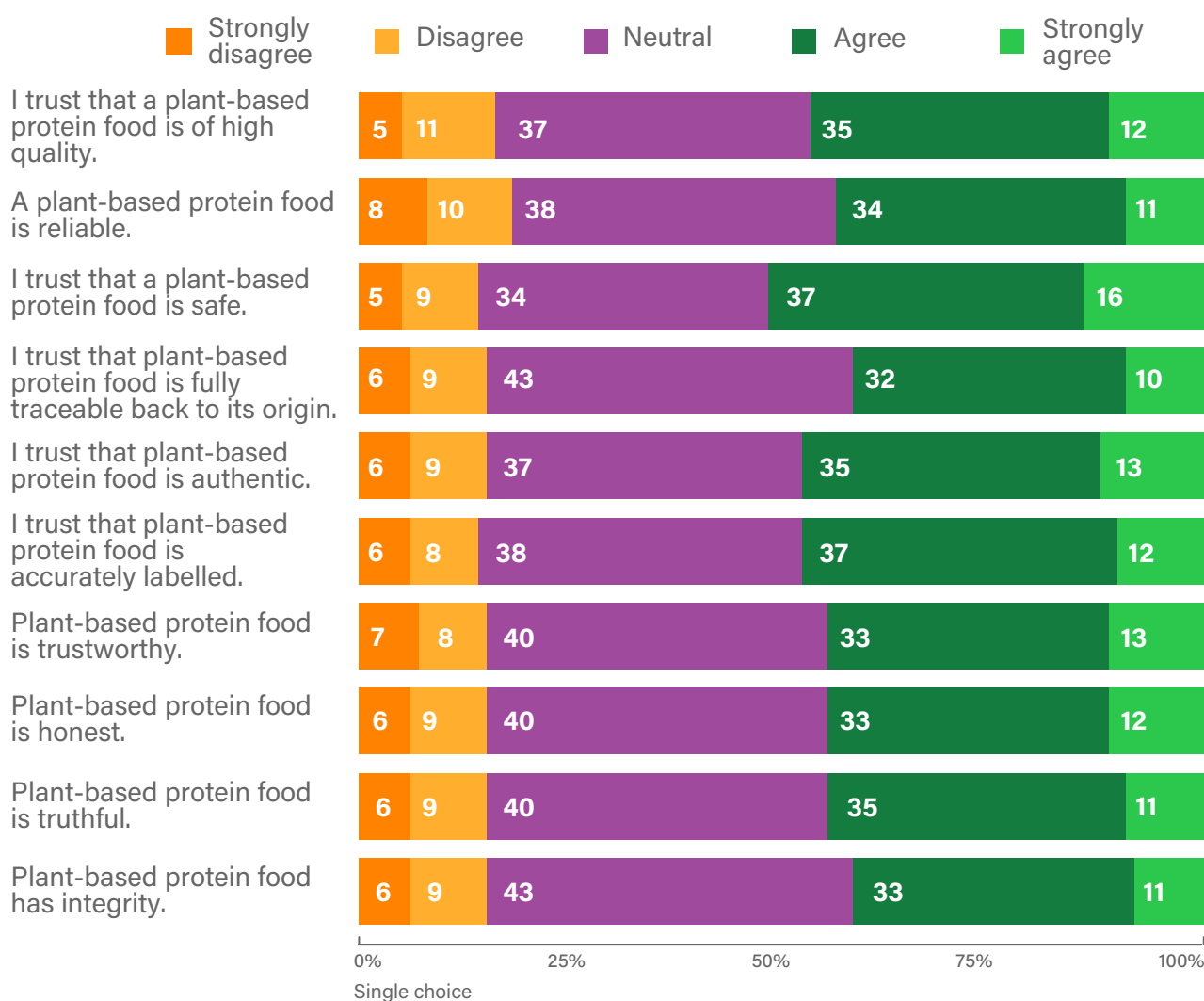
Q26 What are the most important factors when choosing a plant-based/vegan food product? Please select a maximum of five answers.





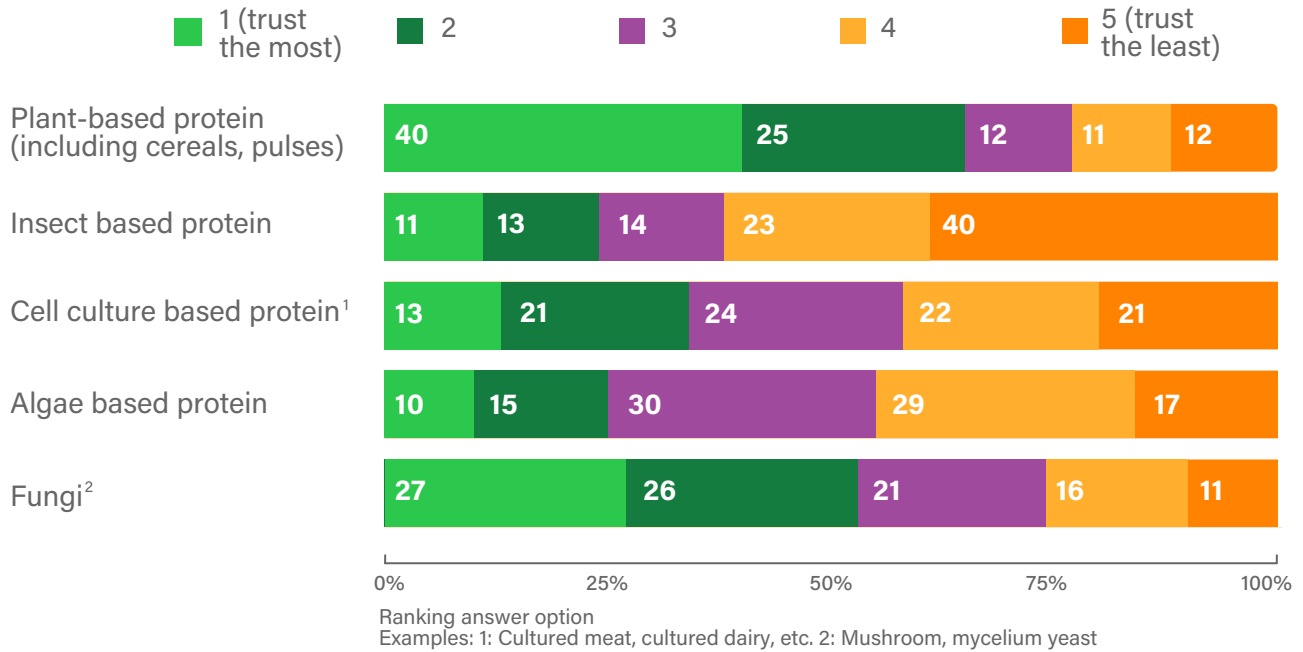
Q27 Please indicate how much you disagree or agree with each of the following statements with regards to trust towards foods based on plant protein (e. g. based on soy protein, pea protein etc.).

More than 50% of UK consumers trust that plant-based protein food is safe.



Q28 Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least).

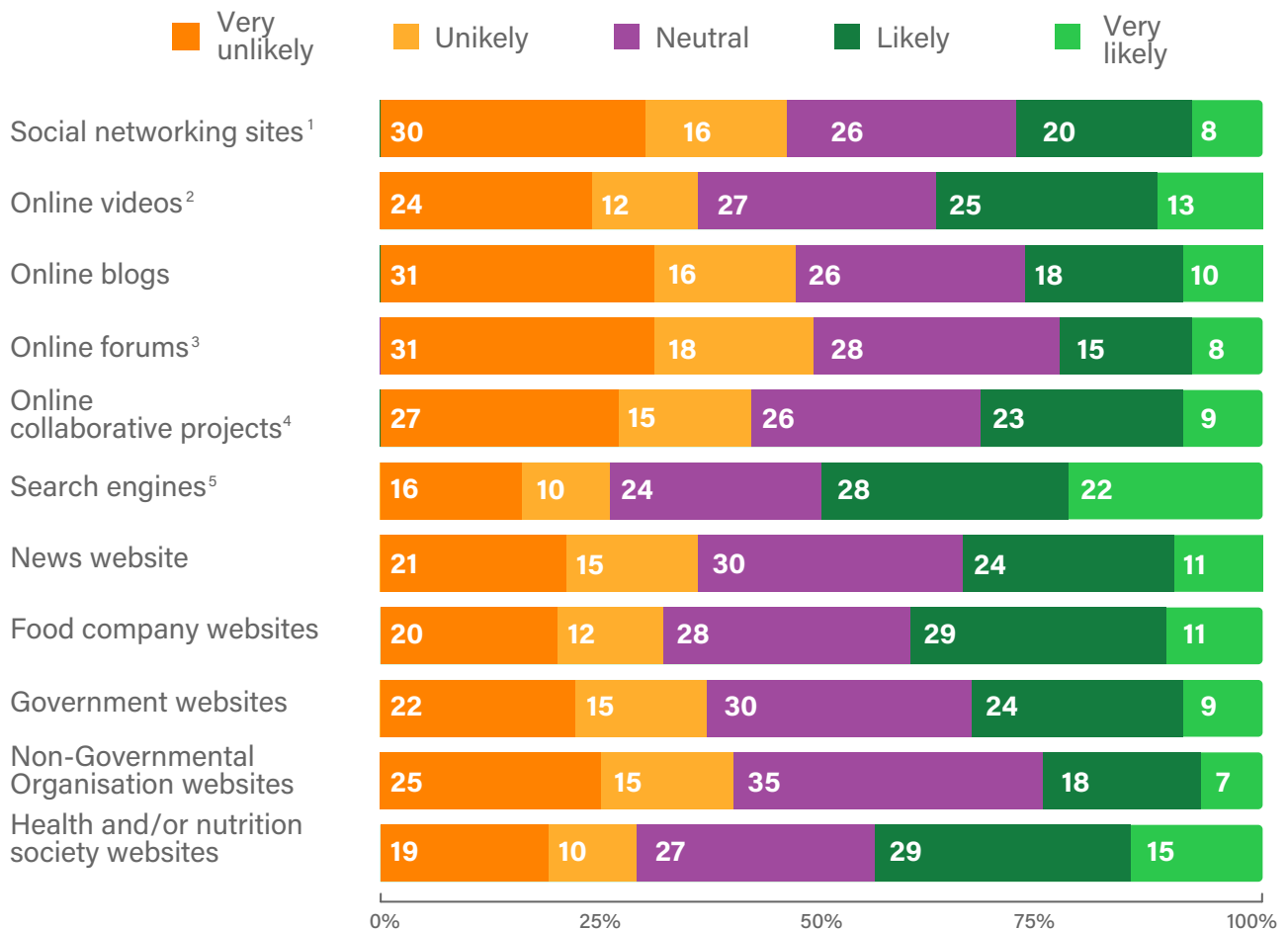
UK consumers trust plant-based protein and fungi the most.





Q29 How likely would you be to use these online communication channels to find information about plant-based food products?

UK consumers are most likely to use search engines to look for information on plant-based food products.

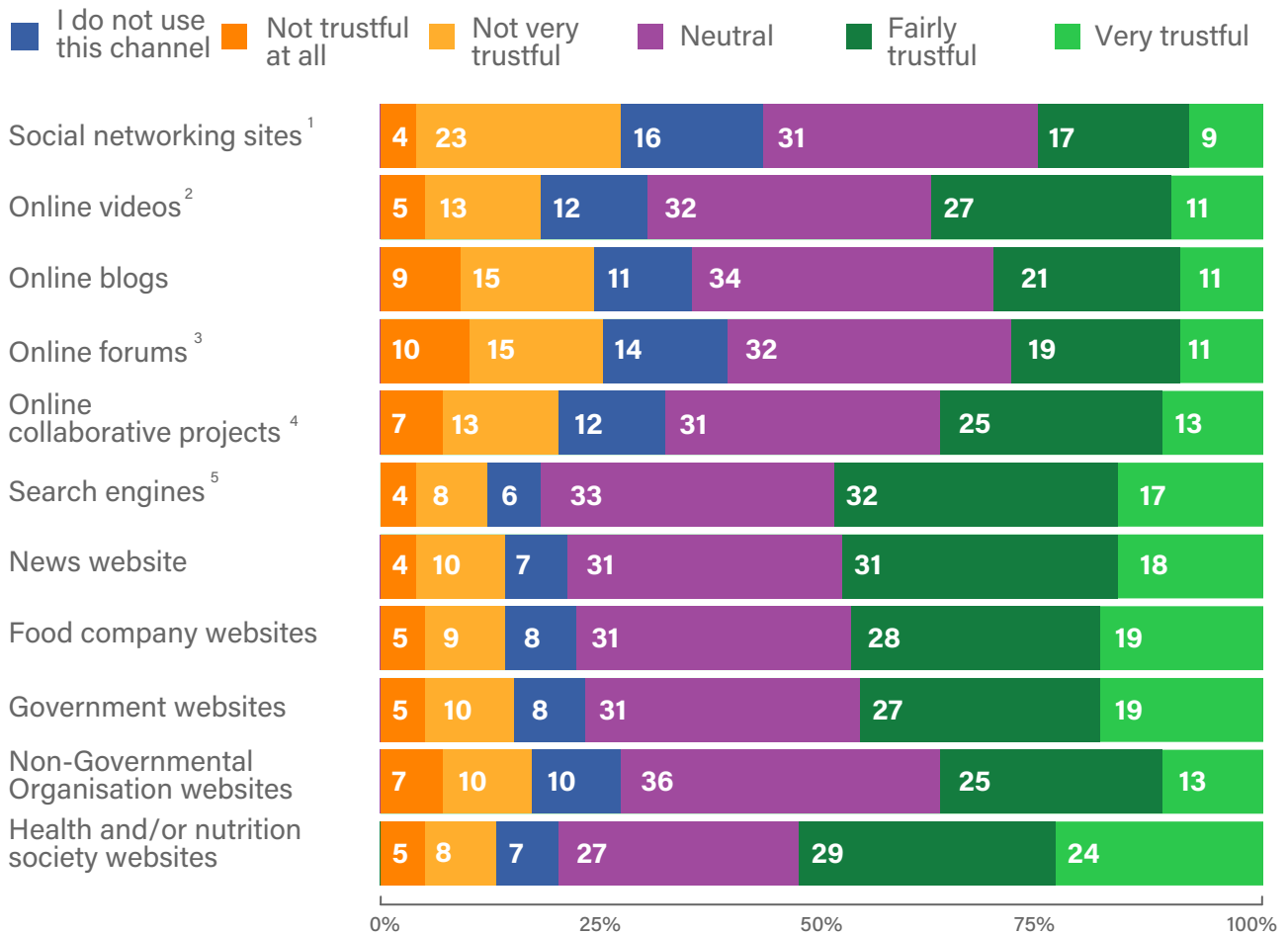


Single selection

Examples: 1: Facebook, Twitter, Instagram, Pinterest 2: Youtube 3: Reddit 4: Wikipedia 5: Google

Q30 In general, how much would you trust the information about plant-based food products from...?

UK consumers trust health and nutrition-society websites the most.



Single selection

Examples: 1: Facebook, Twitter, Instagram, Pinterest 2: Youtube 3: Reddit 4: Wikipedia 5: Google



ABOUT PROVEG

ProVeg is an international food awareness organisation working to transform the global food system by replacing conventional animal-based products with plant-based and cultured alternatives.

ProVeg works with international decision-making bodies, governments, food producers, retailers, investors, the media, and the general public to help the world transition to a society and economy that are less dependent on animal agriculture and more sustainable for humans, animals, and the planet.

As a leading NGO in the alternative-protein space, we have no commercial agenda. This allows us to provide objective expert advice and help support you successfully and effectively by harnessing the power and profitability of the shift to plant-based eating, in the most appropriate way for your business.

We work with companies along the entire value chain, which gives us unique insights into the key challenges, hurdles, and opportunities at every stage of the journey as you take your product to market.
a little bit of body text

INFORM YOUR PRODUCT DEVELOPMENT STRATEGY

EXPAND AND IMPROVE YOUR PRODUCT OFFERING

EFFECTIVELY POSITION YOUR PRODUCTS

BROADEN YOUR REACH

SUPPORT YOUR CSR ACTIVITIES

MARKET RESEARCH RESOURCES

- Smart Protein project (2021): Plant-based foods in Europe: How big is the market? The Smart Protein Plant-based Food Sector Report. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://smartproteinproject.eu/plant-based-food-sector-report/> (last accessed 10.01.2022).
- Smart Protein project/ProVeg (2021): Plant-based foods in Europe: How big is the market? The Smart Protein Plant-based Food Sector Report. Webinar slides and recording. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://proveg.com/what-we-do/corporate-engagement/plant-based-food-sector-report/> (last accessed 10.01.2022).

CONSUMER RESEARCH RESOURCES

- Smart Protein project (2021): What consumers want: A survey on European consumer attitudes towards plant-based foods. Country specific insights. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/> (last accessed 10.01.2022).
- Smart Protein project (2021): What consumers want: a survey on European consumer attitudes towards plant-based foods, with a focus on flexitarians. European Union's Horizon 2020 research and innovation programme (No 862957). Available at <https://smartproteinproject.eu/consumer-attitudes-plant-based-food-report/> (last accessed 10.01.2022).
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