



# UK plant-based food retail market insights

2020-2022



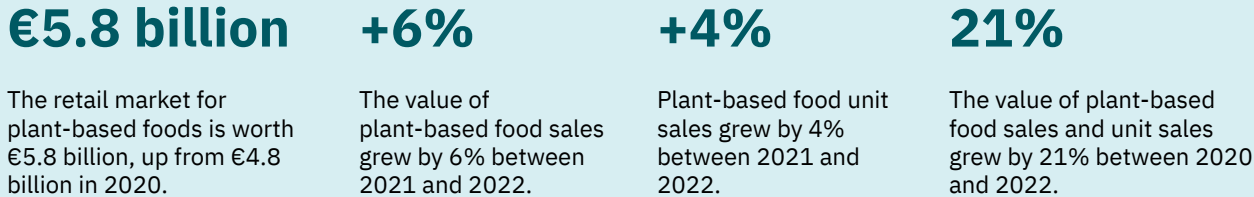
# Executive Summary

Retail sales data from NielsenIQ covering 13 European countries shows that sales of plant-based foods have grown 6% in 2022 – and 21% since 2020 – to reach €5.8 billion.

The global shift towards plant-based diets has sparked a revolution in the food industry, with major food manufacturers and retailers embracing the change. In Europe, plant-based food retail sales have surged in recent years as new products and innovations have come to market, enabling more consumers to purchase next-generation plant-based meat, seafood, eggs and dairy that are competitive with animal products on taste, price and convenience.

## Plant-based foods in Europe are a €5.8 billion market.

The Good Food Institute Europe analysed NielsenIQ plant-based data for 13 European countries – Austria, Belgium, Denmark, France, Germany, Italy, Netherlands, Poland, Portugal, Romania, Spain, Sweden, and the UK – to calculate the size and growth of the plant-based food retail market from 2020 to 2022.



To contextualise the sales performance of plant-based categories in 2022, it is important to note the unique macroeconomic environment that was present due to the ongoing war in Ukraine, global trade tensions, and inflation. While the growth of the plant-based food retail market decelerated in 2022 compared to 2021, both euro and unit sales continued to grow, demonstrating strong demand from consumers for these products despite these challenges.

## Overview of Europe-wide plant-based category sales summary, 2022

	2022 sales value	2021-2022 sales growth	2020-2022 sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Milk	€2.2 B	7%	19%	1.3 B	6%	20%
Meat	€2.0 B	3%	19%	846 M	1%	21%
Yoghurt	€515 M	-0.4%	8%	255 M	-3%	10%
Spreads	€247 M	13%	40%	140 M	4%	26%
Meals	€181 M	20%	79%	72 M	14%	71%
Ice cream	€174 M	8%	14%	57 M	8%	15%
Cheese	€165 M	4%	56%	61 M	4%	62%
Cream	€139 M	7%	7%	109 M	0%	1%
Dessert	€88 M	6%	27%	58 M	5%	40%
Seafood	€43 M	60%	326%	14 M	67%	343%
<b>Total</b>	<b>€5.8 B</b>	<b>6%</b>	<b>21%</b>	<b>2.9 B</b>	<b>4%</b>	<b>21%</b>

### Plant-based foods in the UK are a £963.8 million market.

The UK plant-based food retail market is one of the largest in Europe, and the value of plant-based food sales grew 9% between 2020 and 2022 to £963.8 million.

Plant-based meat is the UK's most developed category of plant-based products, although the value of sales declined in 2022. The second largest category, plant-based milk, continues to experience steady growth. One of the least developed categories, but fastest growing, is plant-based cream.

Dive into the report to better understand the UK plant-based food retail market and how it is growing in comparison to animal-based foods.

**Addendum: In April 2023, we discovered some errors on the part of our data partner for the UK plant-based cheese, yoghurt, and dessert categories and the Poland plant-based cheese category. The corresponding sections of the report, as well as the executive summary and overall plant-based food market section, have been updated with the correct sales figures.**

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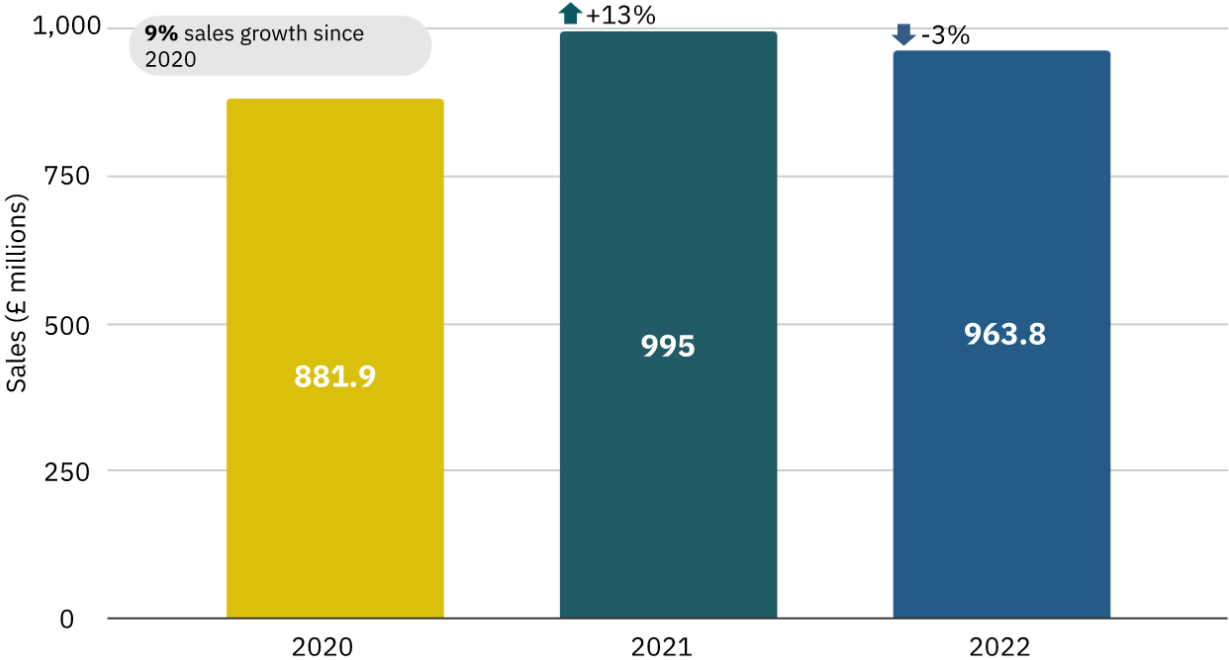
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# Overall plant-based food market

Plant-based food sales in the UK grew by 9% between 2020 and 2022 to £963.8 million (€1.08 billion).

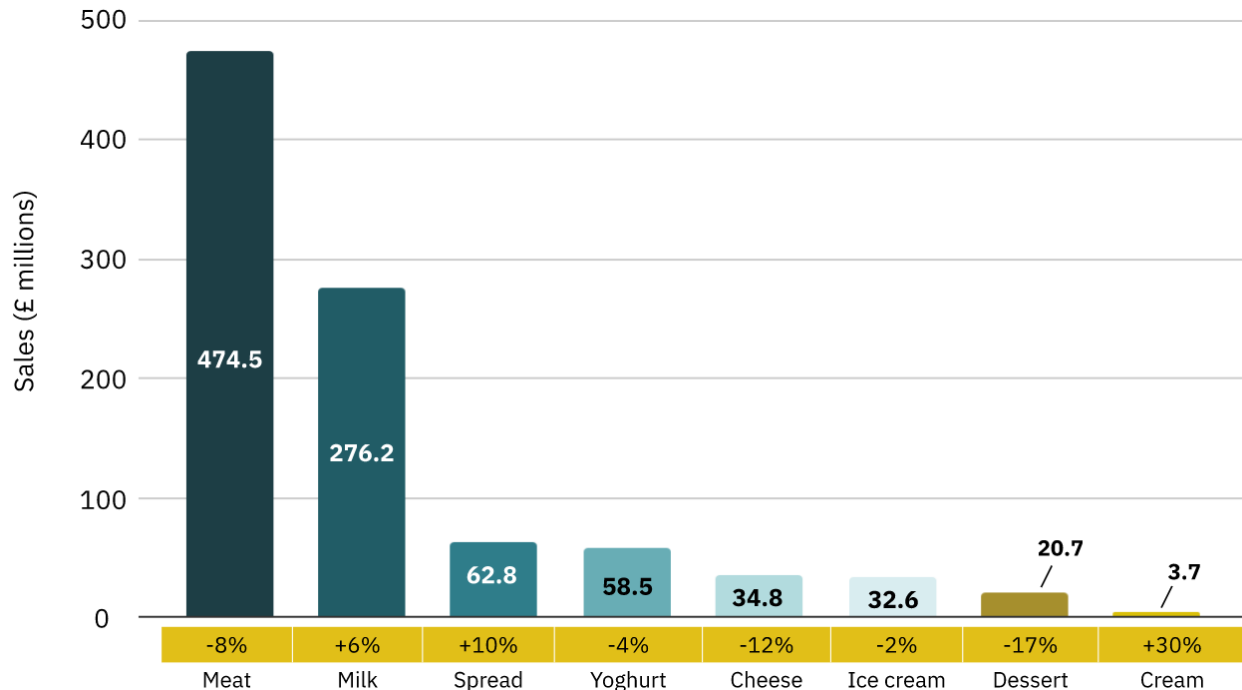
UK plant-based food sales (in £ millions), 2020-2022



## Categories

Plant-based categories are in various stages of development.

### UK plant-based foods sales by category (in £ millions), 2022



Key insights:

- **Plant-based meat is the most developed of all plant-based categories.** After a strong 2021 where plant-based meat pound sales grew by 11%, in 2022 the value of plant-based meat sales declined by 8%.
- **Plant-based milk sales continued to increase, totalling £276.2 million (€308.7 million) in 2022,** growing by 24% between 2020 and 2022.
- **One of the least developed categories, but the fastest growing, is plant-based cream.** At £3.7 million (€4.1 million) in sales in 2022, plant-based cream is still a small category but growing rapidly, with 49% growth between 2020 and 2022.

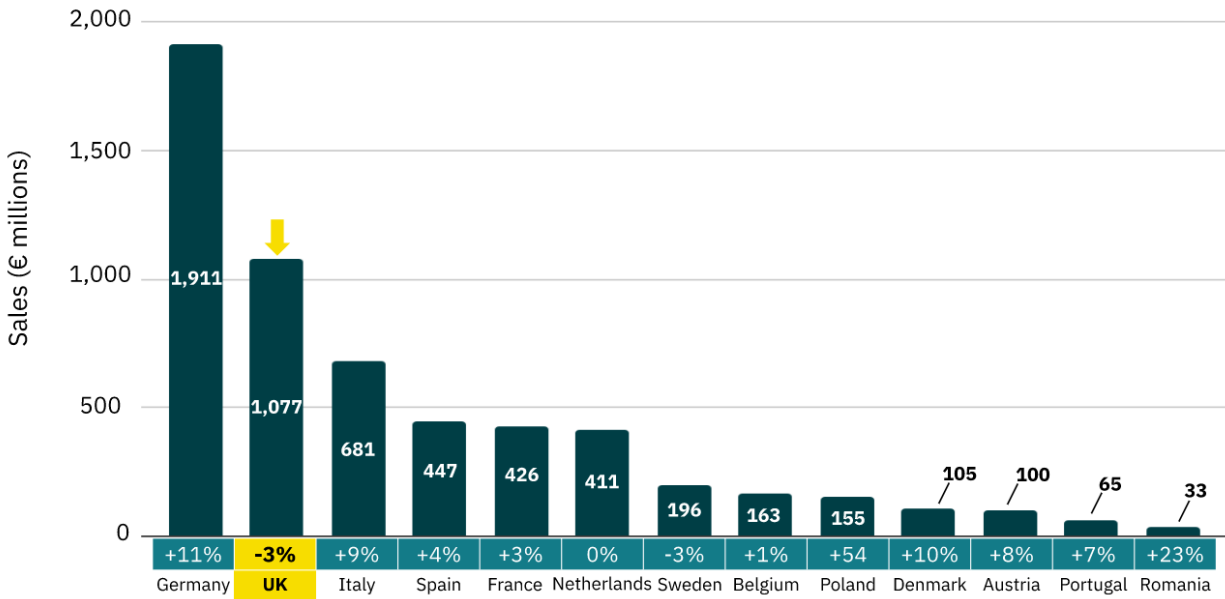
## Plant-based category sales summary, 2022

	2022 £ sales	2022 € sales	2021-2022 £ sales growth	2020-2022 £ sales growth	2022 unit sales	2021-2022 unit sales growth	2020-2022 unit sales growth
Meat	£474.5 M	€530.4 M	-8%	1%	219.5 M	-12%	2%
Milk	£276.2 M	€308.7 M	6%	24%	186.8 M	0.3%	17%
Spreads	£62.8 M	€70.2 M	10%	75%	31.8 M	-12%	26%
Yoghurt	£58.5 M	€63.4 M	-4%	-7%	34.3 M	-9%	-14%
Cheese	£34.8 M	€38.9 M	-12%	0.5%	14.4 M	-19%	-5%
Ice cream	£32.6 M	€ 36.4 M	-2%	14%	12.6 M	-5%	15%
Dessert	£20.7 M	€23.1 M	-17%	-15%	10.6 M	-19%	-21%
Cream	£3.7 M	€4.1 M	30%	49%	2.9 M	19%	38%
<b>Total</b>	<b>£963.8 M</b>	<b>€1.08 B</b>	<b>-3%</b>	<b>9%</b>	<b>512.9 M</b>	<b>-8%</b>	<b>6%</b>

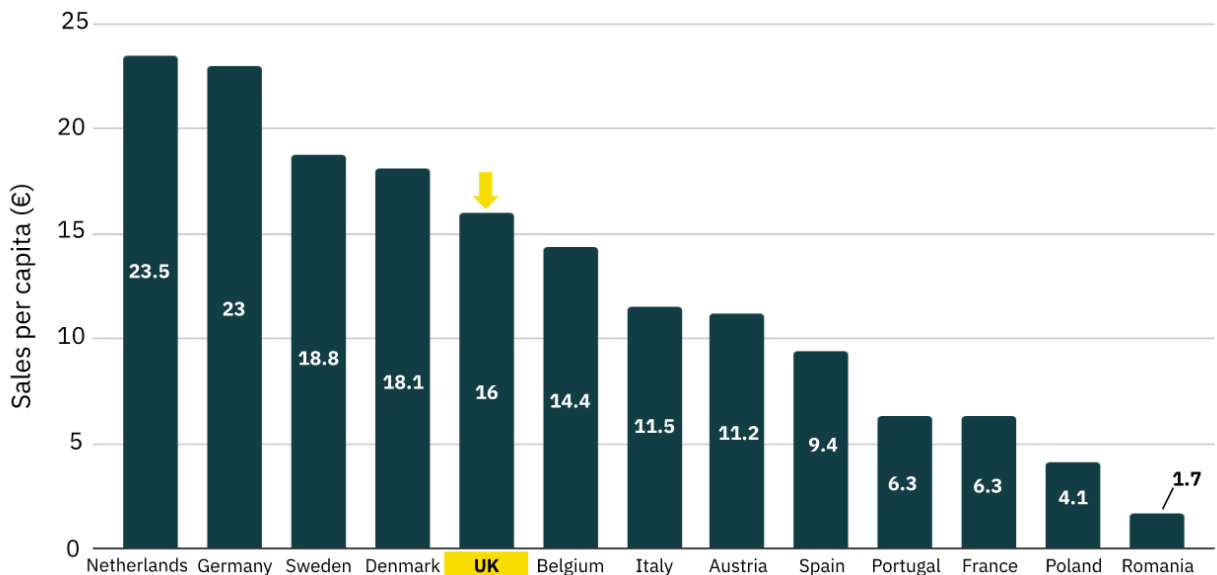
## Country comparison

The UK has the second highest plant-based food sales value. However, in average plant-based food spend per capita, the UK ranks fifth.

### Europe-wide plant-based food sales per country (in € millions), 2022



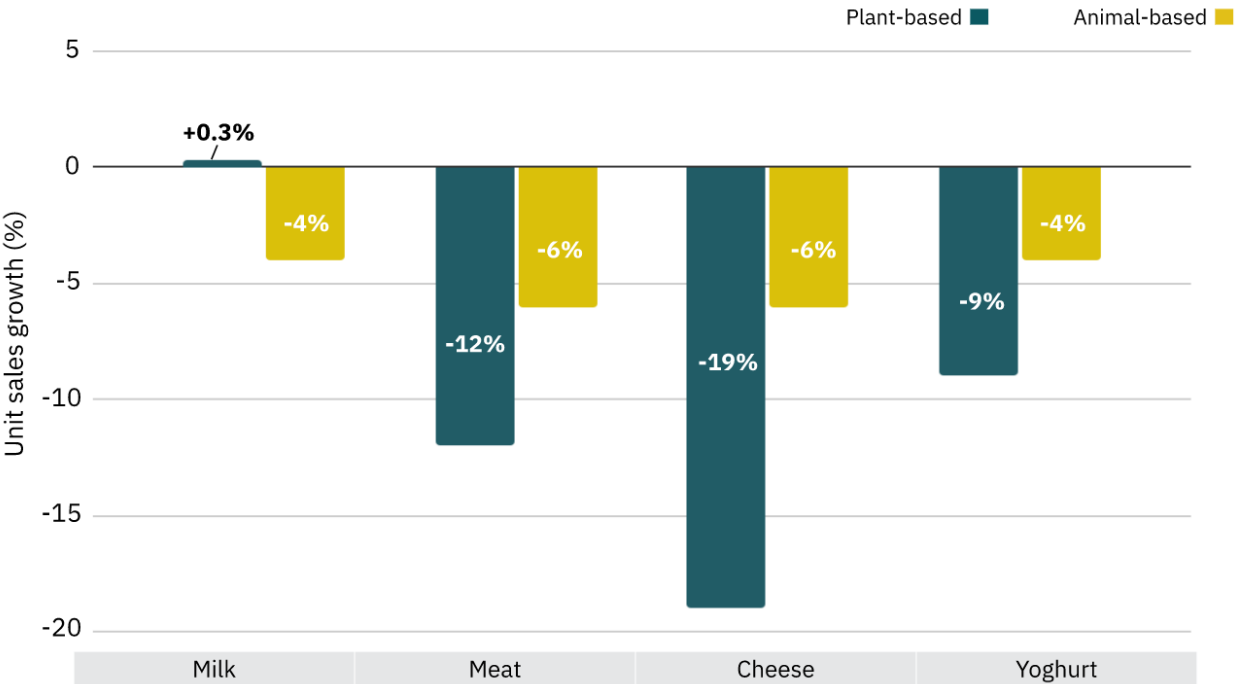
### Europe-wide average plant-based food spend per country per capita (in euros), 2022





# Comparison to animal-based foods

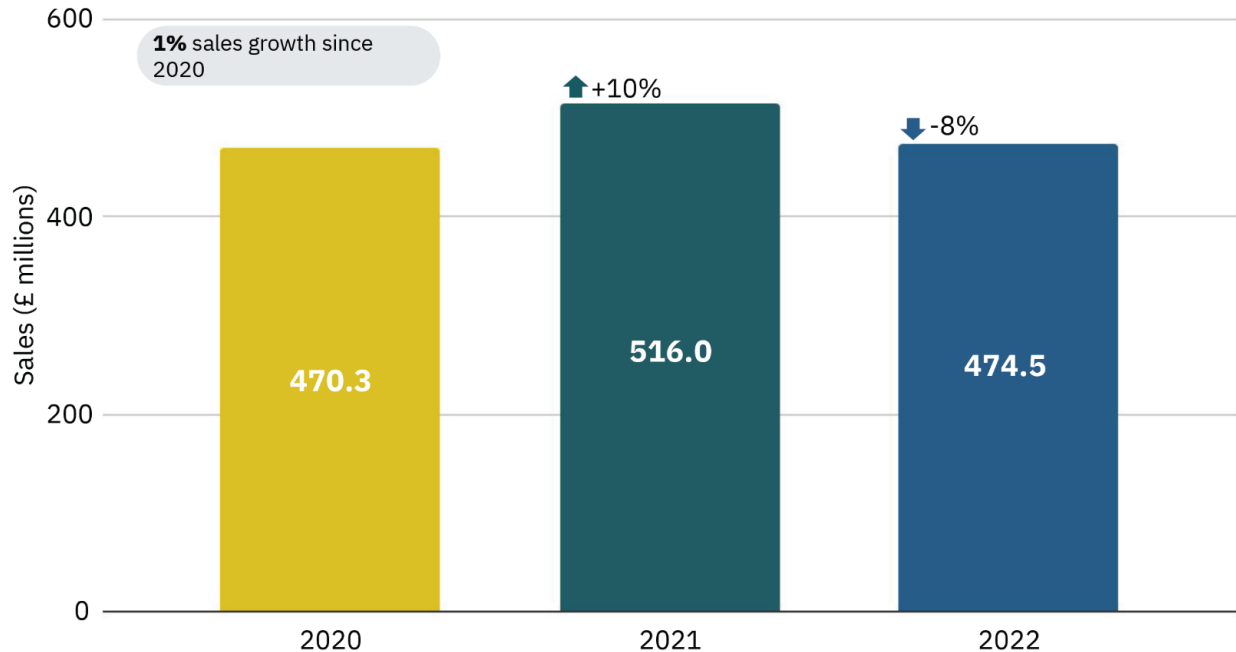
## UK plant-based vs animal-based category unit sales growth, 2022



To compare the growth of plant-based versus animal-based categories, we compared unit sales (instead of sales by value) as it provides a more direct comparison. In 2022, unit sales growth of the plant-based milk outpaced that of animal-based categories, while all other plant-based and animal-based categories declined.

# Plant-based meat<sup>1</sup>

## UK plant-based meat sales (in £ millions), 2020-2022



### Key insights:

- The value of plant-based meat sales increased by 1% between 2020 and 2022, and total unit sales for plant-based meat increased by 2%.
- In comparison, pre-packaged conventional meat unit sales decreased by 9% between 2020 and 2022.
- In terms of average price per unit in 2022, the plant-based meat category has been less impacted by inflation and price increases. Plant-based meat prices increased by 4%, whereas pre-packaged conventional meat prices increased by 10%.
- In 2022, plant-based meat had a 3% market share of the total retail pre-packaged meat category.<sup>2</sup>

<sup>1</sup> The plant-based meat category includes both analogues (products that mimic the appearance and taste of animal-based meat) and non-analogues (e.g. vegetable-based patties).

<sup>2</sup> Nielsen only reports on pre-packaged animal-based meat sales, therefore the market share calculation is only for the pre-packaged meat category.

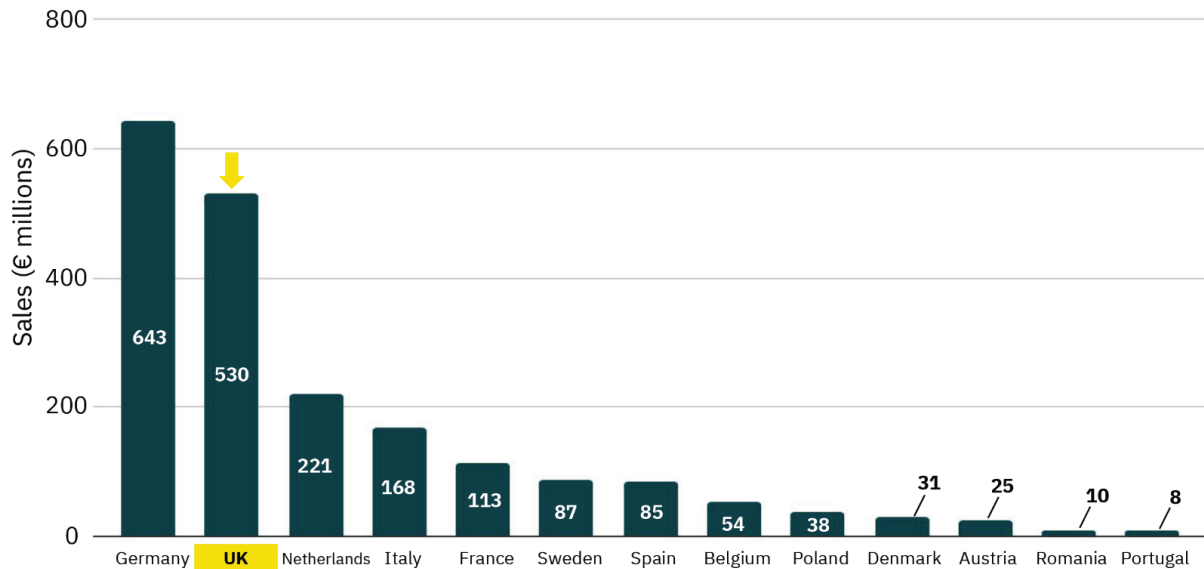
### Segment insights:

- Refrigerated plant-based meat makes up the majority of the category by value in 2022, representing 61% of total plant-based meat sales, whereas frozen and shelf-stable plant-based meat make up 38% and 1% respectively.
- The most popular plant-based meat formats are pieces/strips, which make up 24% of sales by value, followed by sausages (19%), burgers (11%), mince (6%) and steak (6%).

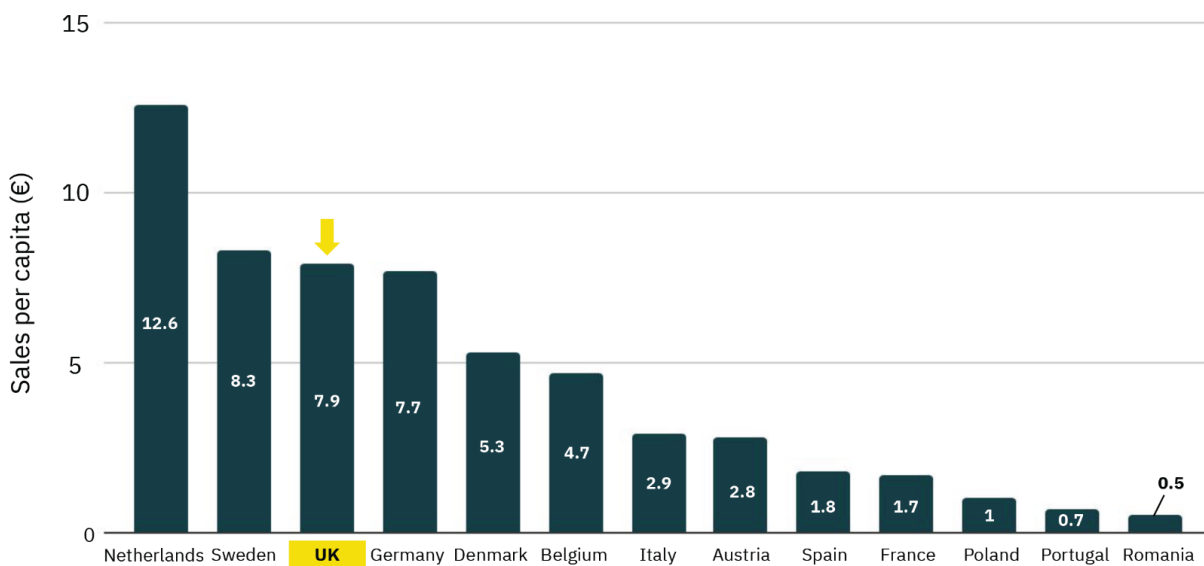
## Country comparison

The UK has the second highest plant-based meat sales value in Europe and the third highest average plant-based meat spend per capita.

### Europe-wide plant-based meat sales per country (in € millions), 2022

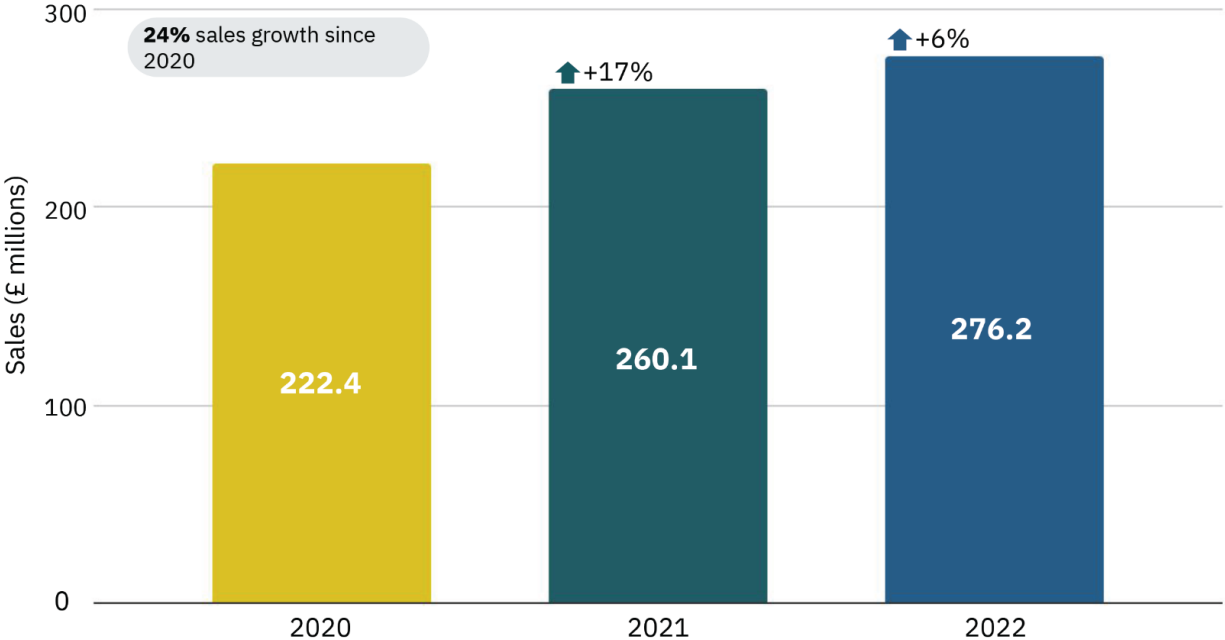


### Europe-wide average plant-based meat spend per country per capita (in euros), 2022



# Plant-based milk

UK plant-based milk sales (in £ millions), 2020-2022



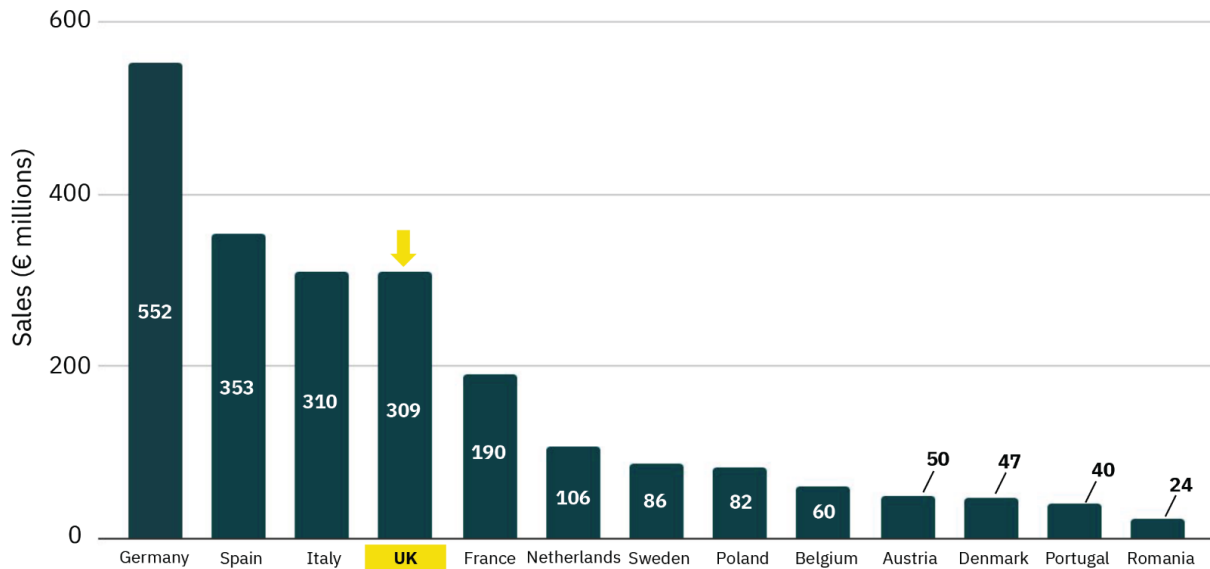
Key insights:

- The value of plant-based milk sales increased by 24% between 2020 and 2022, and total unit sales for plant-based milk increased by 17%.
- In comparison, conventional milk unit sales decreased by 6% between 2020 and 2022.
- In terms of average price per unit, the plant-based milk category has been less impacted by inflation and price increases in 2022. Plant-based milk prices increased by 6%, whereas conventional milk prices increased by 21%.
- In 2022, plant-based milk had a 7% market share of the total milk category.

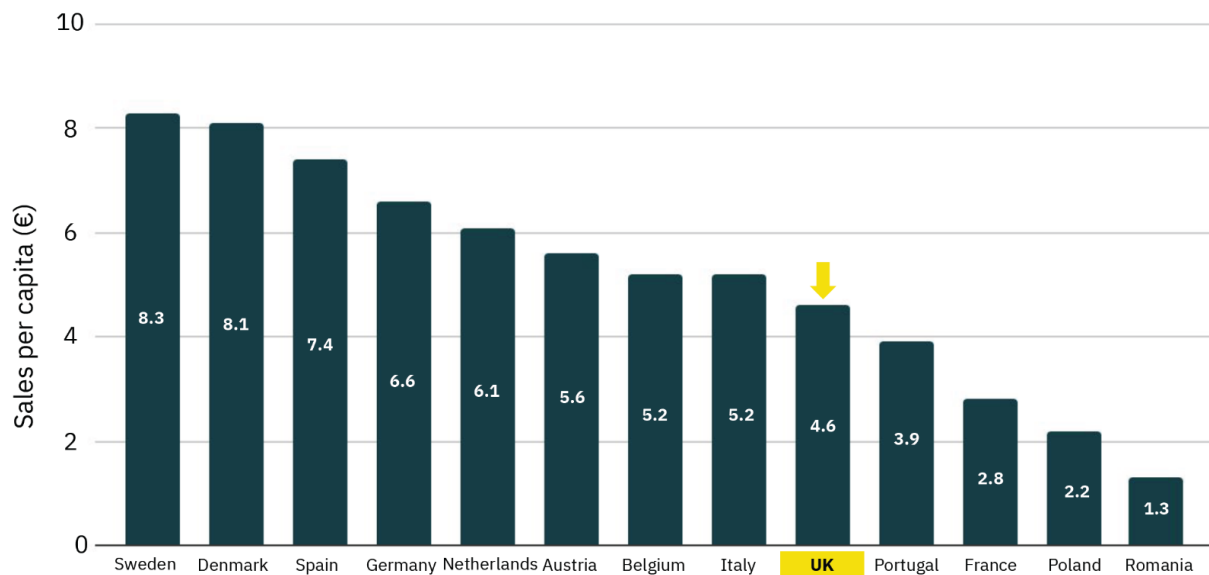
## Country comparison

The UK has the fourth highest plant-based milk sales value in Europe. However, in average plant-based milk spend per capita, the UK ranks ninth.

### Europe-wide plant-based milk sales per country (in € millions), 2022

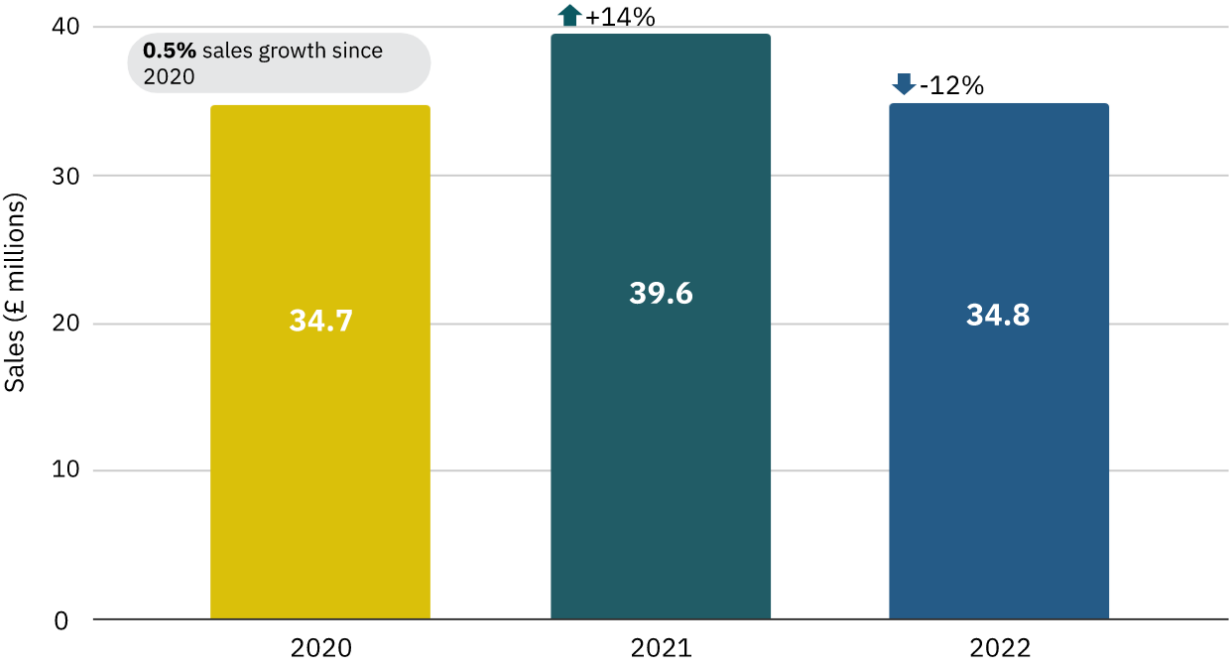


### Europe-wide average plant-based milk spend per country per capita (in euros), 2022



# Plant-based cheese

UK plant-based cheese sales (in £ millions), 2020-2022



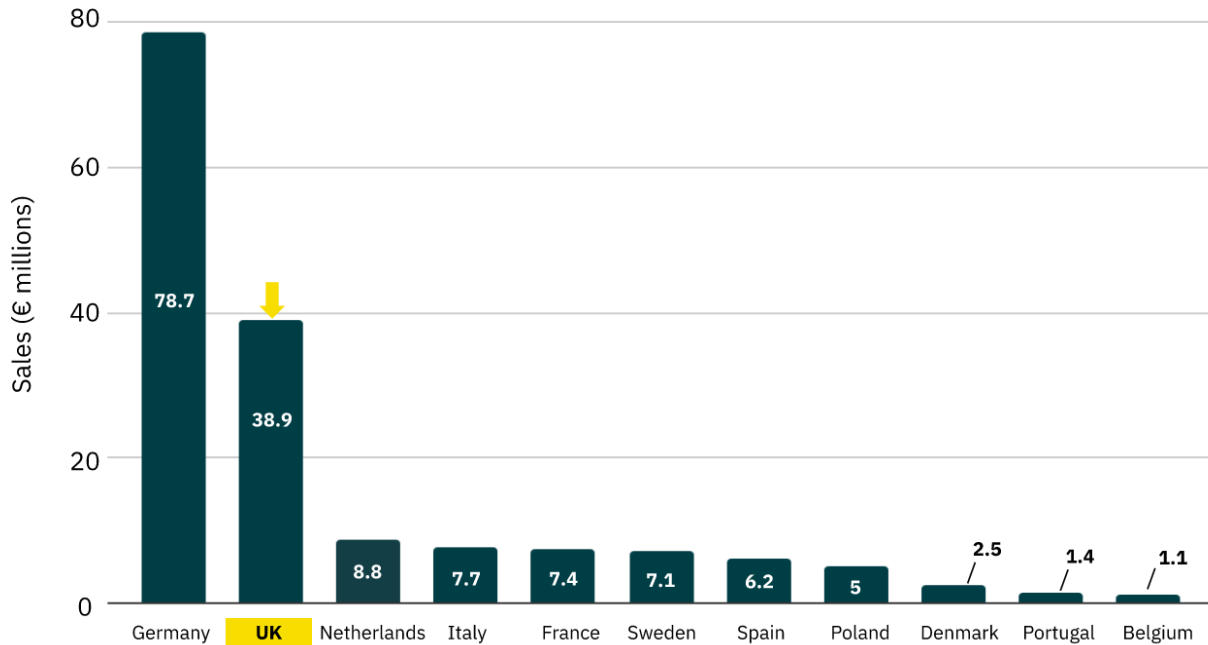
Key insights:

- The value of plant-based cheese sales grew 0.5% between 2020 and 2022 while plant-based cheese unit sales declined by 5%.
- In comparison, conventional cheese unit sales also decreased by 5% between 2020 and 2022.
- The average price per unit of plant-based and conventional cheese in 2022 increased by 8% and 13% respectively.
- In 2022, plant-based cheese had a 1% market share of the total cheese category.

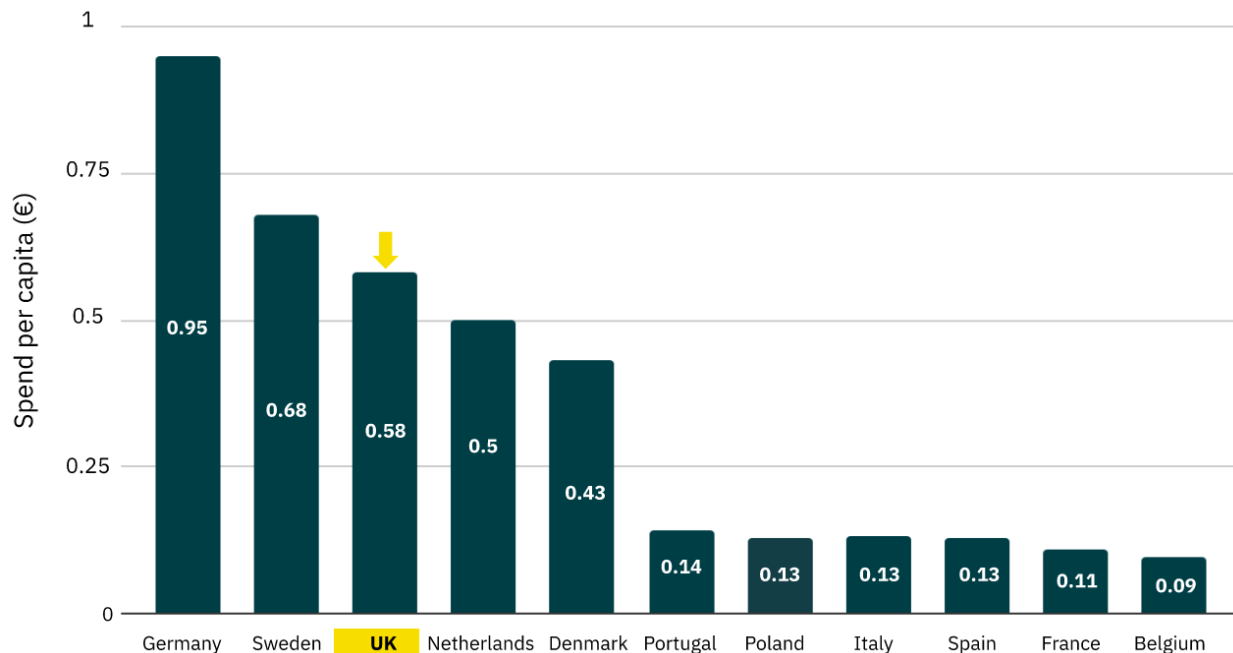
## Country comparison

The UK has the second highest plant-based cheese sales value in Europe and ranks third in average plant-based cheese spend per capita.

### Europe-wide plant-based cheese sales per country (in € millions), 2022



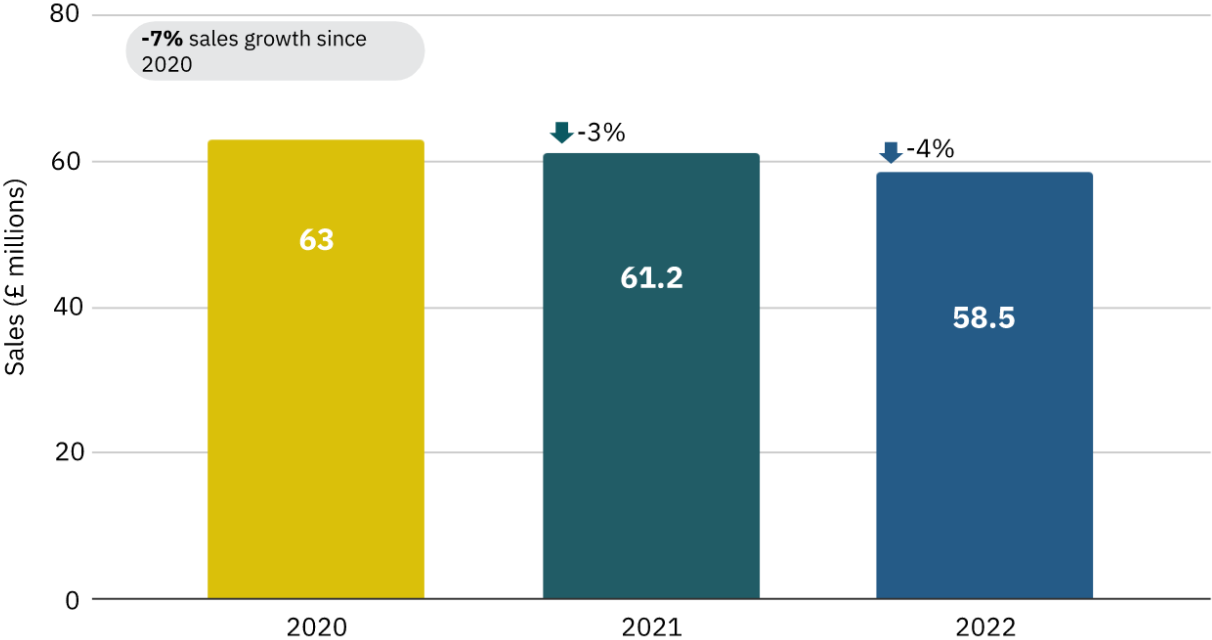
### Europe-wide average plant-based cheese spend per country per capita (in euros), 2022





# Plant-based yoghurt

UK plant-based yoghurt sales (in £ millions), 2020-2022



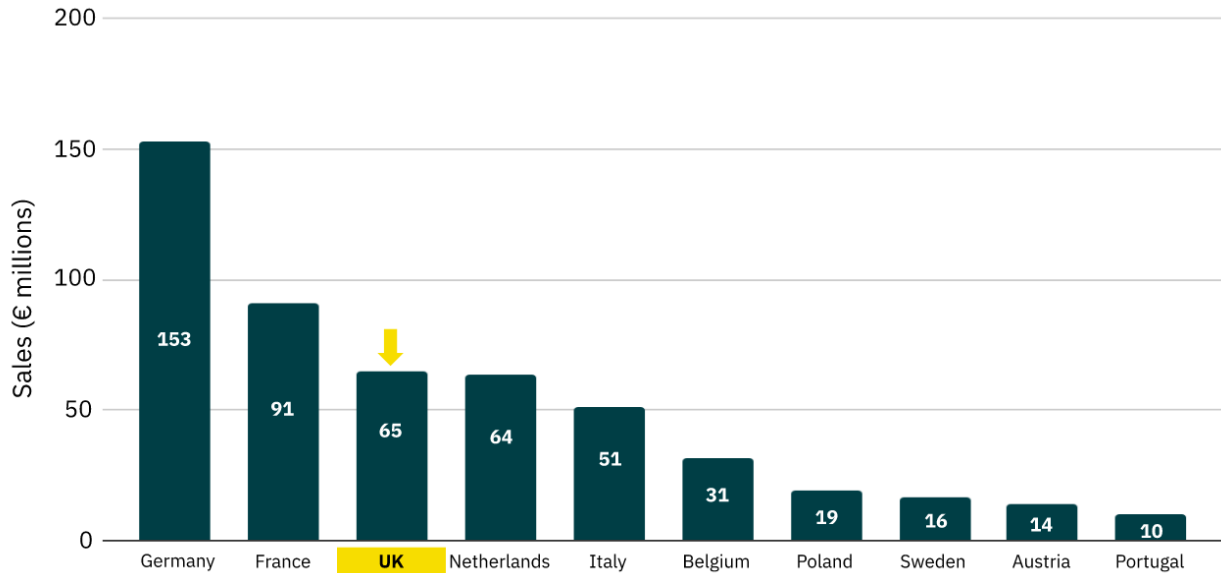
Key insights:

- The value of plant-based yoghurt sales decreased by 7% between 2020 and 2022, and unit sales decreased by 14%.
- In comparison, conventional yoghurt unit sales decreased by 3% between 2020 and 2022.
- The average price per unit of plant-based and conventional yoghurt in 2022 increased by 6% and 8% respectively.
- In 2022, plant-based yoghurt had a 3% market share of the total yoghurt category.

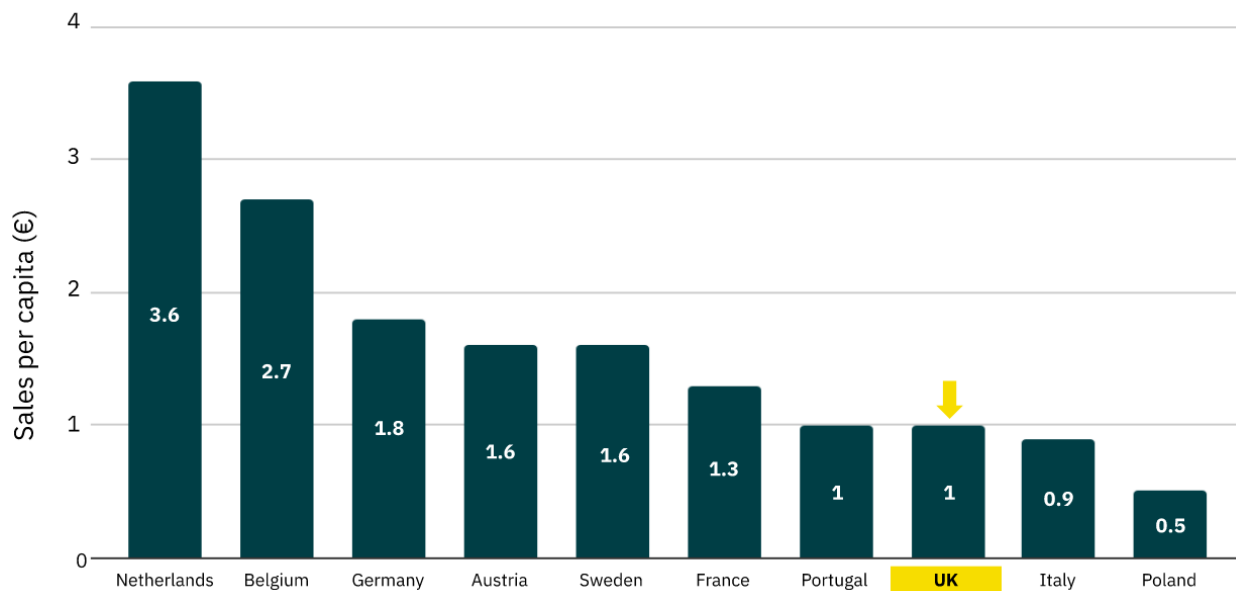
## Country comparison

The UK has the third highest plant-based yoghurt sales in Europe. However, in average plant-based yoghurt spend per capita, the UK ranks eighth.

### Europe-wide plant-based yoghurt sales per country (in € millions), 2022

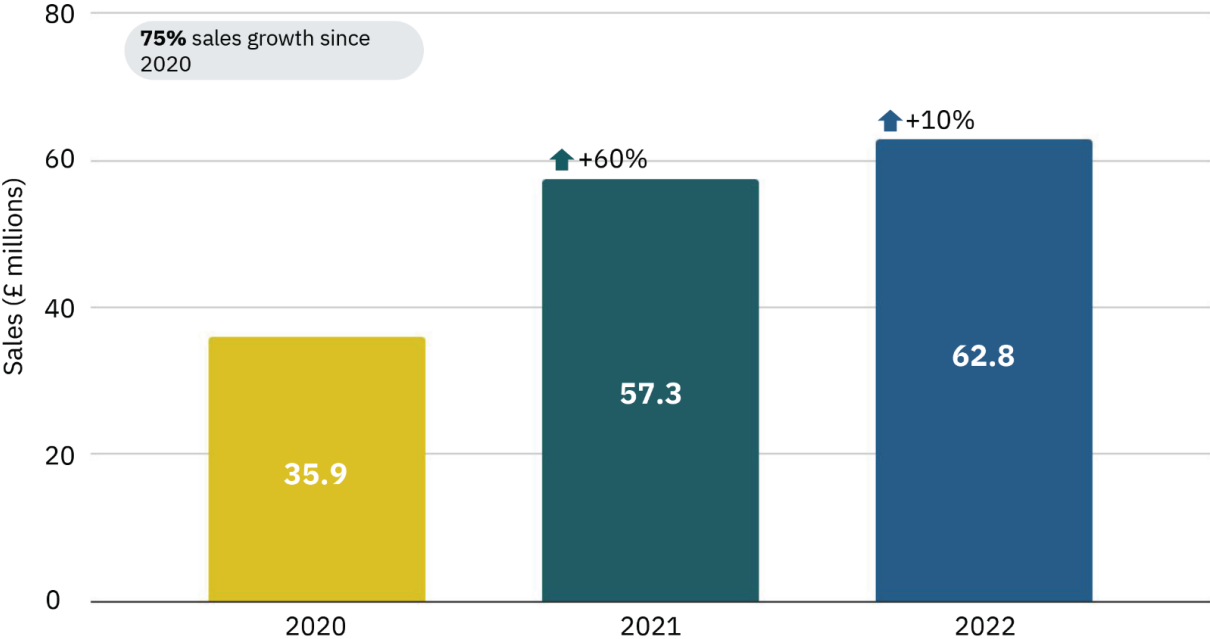


### Europe-wide average plant-based yoghurt spend per country per capita (in euros), 2022



# Plant-based spreads<sup>3</sup>

UK plant-based spread sales (in £ millions), 2020-2022



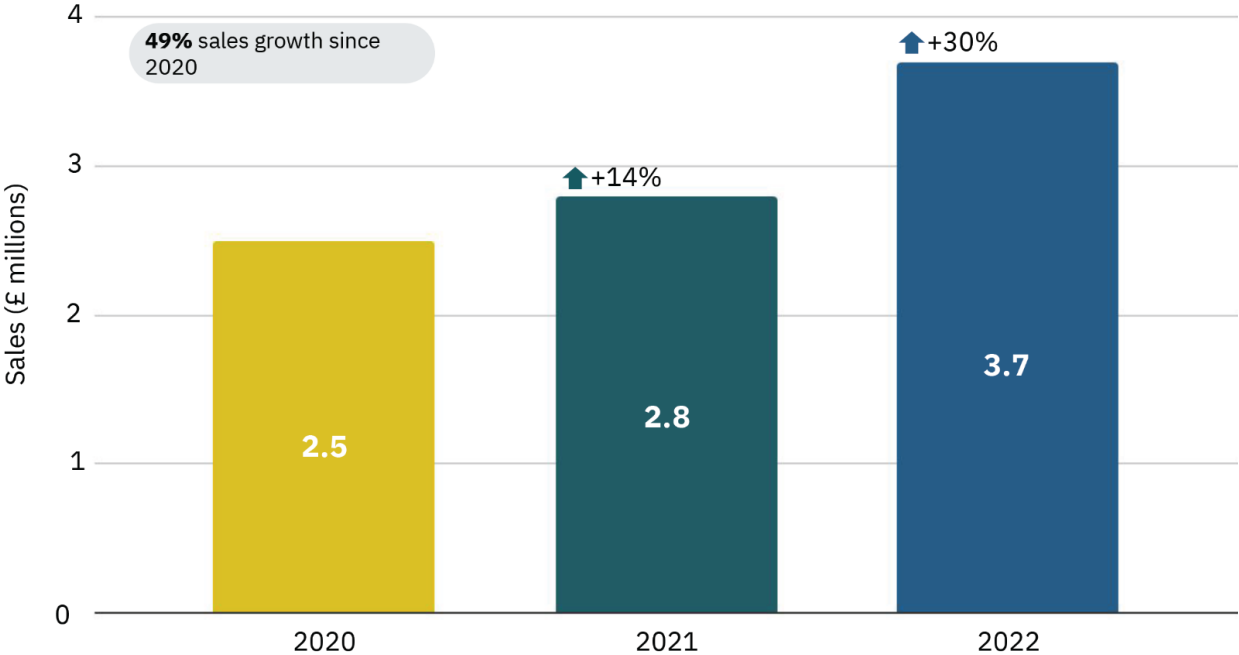
Key insights:

- The value of plant-based spreads sales increased by 75% between 2020 and 2022.
- Plant-based spreads unit sales increased by 26% between 2020 and 2022.
- The average price per plant-based spread unit in 2022 increased by 25%.

<sup>3</sup> The plant-based spreads category includes butter and margarine.

# Plant-based cream

UK plant-based cream sales (in £ millions), 2020-2022

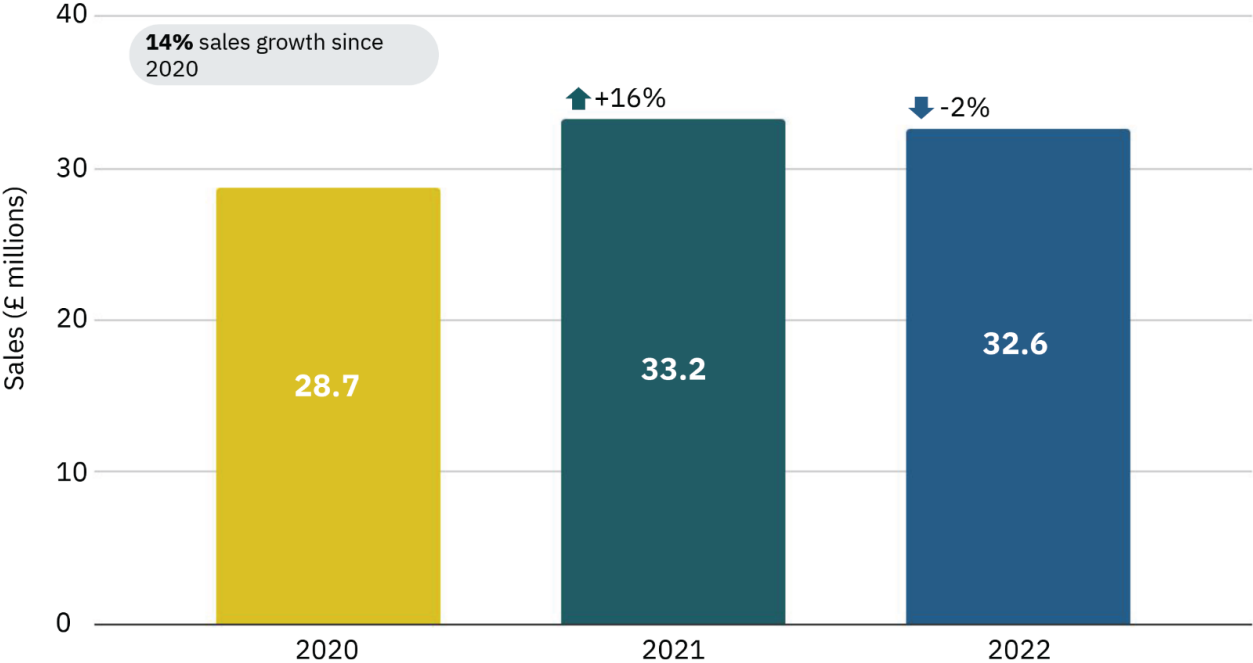


Key insights:

- The value of plant-based cream sales increased by 49% between 2020 and 2022.
- Plant-based cream unit sales increased by 38% between 2020 and 2022.
- The average price per unit of plant-based cream in 2022 increased by 9%.

# Plant-based ice cream

UK plant-based ice cream sales (in £ millions), 2020-2022

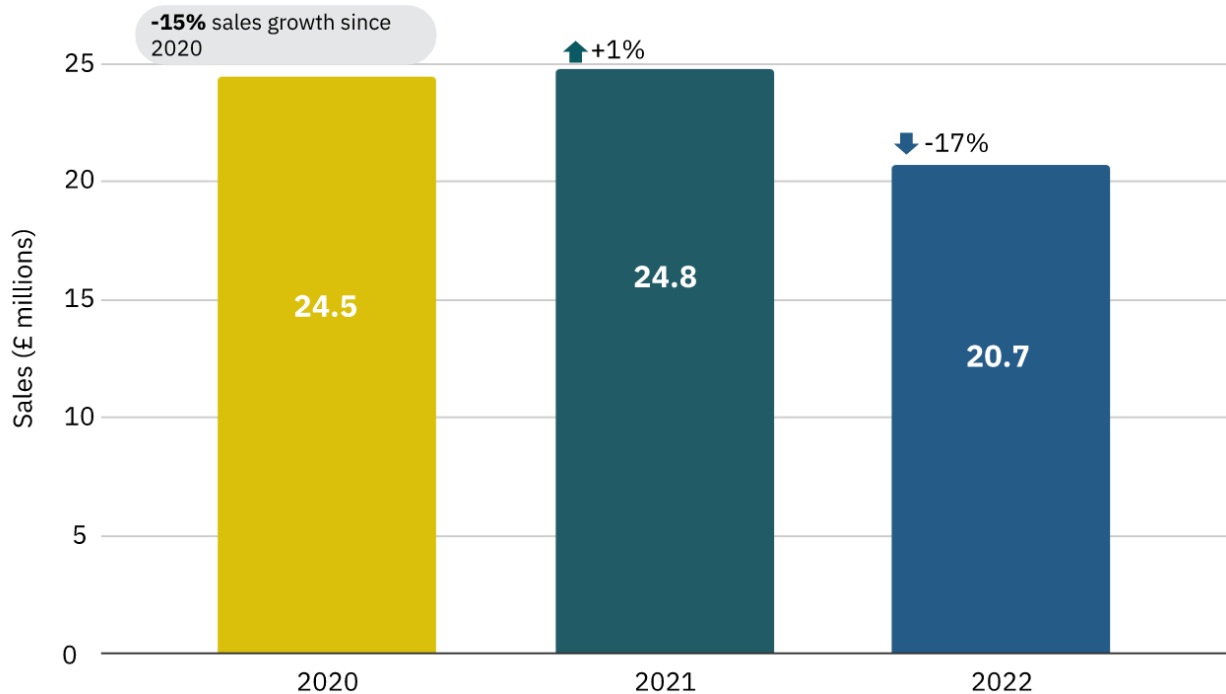


Key insights:

- The value of plant-based ice cream sales increased by 14% between 2020 and 2022.
- Plant-based ice cream unit sales increased by 15% between 2020 and 2022.
- The average price per unit of plant-based ice cream in 2022 increased by 3%.

## Plant-based dessert<sup>4</sup>

### UK plant-based dessert sales (in £ millions), 2020-2022



#### Key insights:

- The value of plant-based dessert sales decreased by 15% between 2020 and 2022.
- Plant-based dessert unit sales decreased by 21% between 2020 and 2022.
- The average price per plant-based dessert unit increased by 3% in 2022.

<sup>4</sup> The plant-based dessert category is primarily made up of pudding, custard and cheesecake.

## Closing remarks

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“The plant-based food retail market in Europe has seen significant growth in recent years, driven by better plant-based products being brought to market. This is encouraging as the world works to address the many problems caused by industrial animal agriculture. However, to sustain this growth, companies must continue investing in product innovation to develop plant-based products that meet consumer expectations when it comes to the key drivers of taste, price, and convenience. The Good Food Institute’s [Advancing Solutions for Alternative Proteins database](#) is a great source to better understand key innovation priorities.”

**Carlote Lucas,**  
*Senior Corporate Engagement Manager at  
the Good Food Institute Europe*



## About the data

To size the UK retail market for plant-based foods, GFI Europe commissioned retail sales data from market research firm NielsenIQ. Analysis in this report is based on data reported by NielsenIQ for the total plant-based, total dairy products, and total pre-packed meat categories for the 52-week, 104-week, and 156-week periods ending 31 December 2022, for the UK market, according to GFI Europe product hierarchy. Therefore the data presented in this report may not align with standard NielsenIQ categories. Copyright © 2022, Nielsen Consumer, LLC.

## About the Good Food Institute Europe

[The Good Food Institute Europe](#) is an international NGO helping to build a more sustainable, secure and just food system by transforming meat production.

We work with scientists, businesses and policymakers to advance plant-based and cultivated meat – making them delicious, affordable and accessible across Europe.

By making meat from plants and cultivating it from cells, we can reduce the environmental impact of our food system and feed more people with fewer resources. GFI Europe is powered by philanthropy.

## Contact

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