Alternative protein: Plant-based | Region: UK | June 2025

2022 to 2024

UK plant-based food retail market insights

Meat, seafood, milk and drinks, cheese, yoghurt and cream.

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Executive summary

This report shows retail sales trends in six plant-based categories (meat, seafood, milk and drinks, cheese, yoghurt and chilled cream) in the UK over a three-year period between January 2022 and January 2025, based on data from Circana. It also uses NIQ Homescan data to investigate trends in household purchase patterns.

The UK retail market across six categories of plant-based food was **valued at £898 million** in the year to January 2025.	The combined sales **volume** of six plant-based categories in the UK **fell by 3.5%** in the year to January 2025.	**31.6%** of UK households bought plant-based **meat** at least once in 2024, while **31.8%** bought plant-based **milk**.

The UK plant-based market is experiencing a fall in overall sales – but the rate of decline in sales volume has slowed.

The combined annual sales value across six plant-based categories was £898 million (€1.06 billion) in the year to January 2025. This was 4.5% lower than in the previous year, and 3.4% lower than the year to January 2023.

Total sales volume in the year to January 2025 was 299 million kg – 3.5% lower than in the previous year, and 10.6% lower than two years previously. This shows that most of the fall in sales volume happened in the year to January 2024, and the overall rate of decline has slowed.

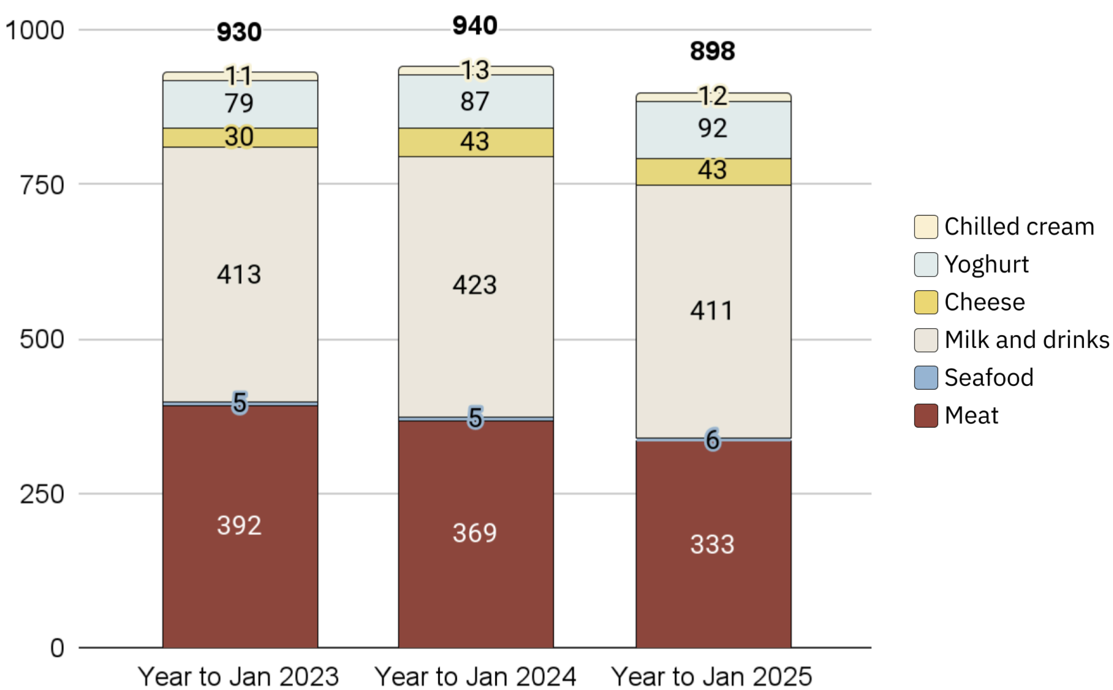
In the year to January 2025, the sales volume of private-label products – those sold under the brand of a retailer – was down by 8.9%, while that of branded products was down by only 2.3%. This suggests that factors such as taste and quality may be more important than price in driving plant-based food sales in the UK, as branded products tend to be more expensive than private-label options.

Household panel data from NIQ shows that the proportion of households buying plant-based meat at least once per year fell between 2022 and 2024, while the proportion buying plant-based milk rose.

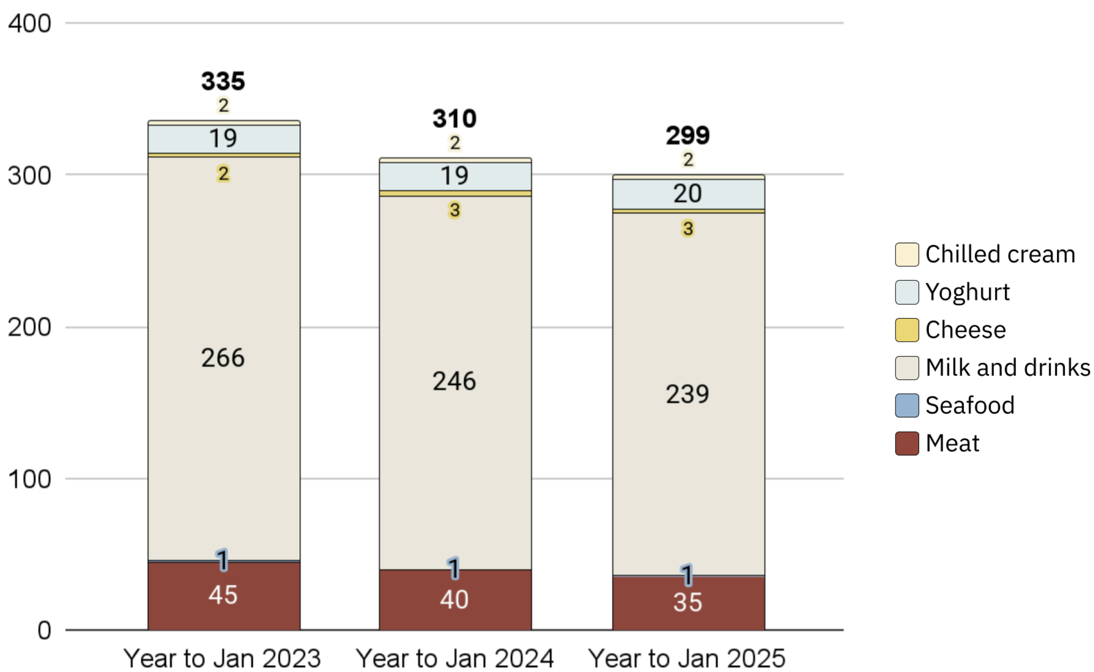
Overview of plant-based food sales by category in the UK, year to Jan 2023-year to Jan 2025

	Sales value			Unit sales			Sales volume		
	Year to Jan 2025, £ million	Year to Jan 24 - Year to Jan 25 change	Year to Jan 23 - Year to Jan 25 change	Year to Jan 2025, million units	Year to Jan 24 - Year to Jan 25 change	Year to Jan 23 - Year to Jan 25 change	Year to Jan 2025, million kg	Year to Jan 24 - Year to Jan 25 change	Year to Jan 23 - Year to Jan 25 change
Meat	333.0	-9.7%	-15.1%	145.0	-10.9%	-20.8%	35.4	-11.5%	-22.1%
Seafood	6.3	21.5%	29.8%	2.6	17.6%	17.3%	0.5	3.5%	-1.4%
Milk and drinks	410.8	-2.9%	-0.6%	243.4	-3.2%	-10.2%	238.7	-3.0%	-10.2%
Cheese	43.3	-0.4%	44.6%	17.2	1.2%	44.5%	3.1	-2.6%	37.4%
Yoghurt	92.1	6.3%	16.9%	51.4	10.6%	11.5%	19.7	6.5%	2.8%
Cream	12.2	-3.3%	16.0%	8.3	-0.9%	11.7%	2.0	-0.5%	12.2%
Total	**897.7**	**-4.5%**	**-3.4%**	**467.8**	**-4.2%**	**-10.3%**	**299.3**	**-3.5%**	**-10.6%**

Plant-based food sales value by category in the UK, year to January 2023-year to January 2025 (£ millions)



Plant-based food sales volume* by category in the UK, year to January 2023-year to January 2025 (millions of kg)



**Sales volume was measured in litres for milk and drinks and chilled cream, and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.*

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About the data

This report is based on sales data gathered by Circana from retailers in the UK. The data has been analysed by the Good Food Institute Europe. It also draws on household panel data from the NIQ Panel On Demand Homescan consumer panel, which tracks food purchases made by a representative panel of households, to offer a complementary viewpoint to the Circana retail sales data.

The Circana data for the UK covers supermarkets and convenience stores. It does not cover discounter stores such as Aldi and Lidl, which together accounted for around 18% of the UK's grocery retail market in 2024. This report does not include food service sales, such as from restaurants or fast-food outlets.

Sales value figures include taxes.

This report presents trends over a three-year time period running from late January 2022 until late January 2025. The following terms have been used throughout this report:

- Year to Jan 2023 = The 52-week period ending in late January 2023.
- Year to Jan 2024 = The 52-week period ending in late January 2024.
- Year to Jan 2025 = The 52-week period ending in late January 2025.

The precise end dates vary by product category, as follows:

- Plant-based meat and seafood, all cheese, all cream: 52-week periods ending 28 January 2023, 27 January 2024 and 25 January 2025.
- Frozen animal-based fish, all milk and drinks, all yoghurt: 52-week periods ending 22 January 2023, 21 January 2024 and 19 January 2025.

To enable comparison with sales data for the other five countries in this series of reports, calendar year data for 2023 and 2024 have been provided in the Appendix.

Note that GFI Europe's previous publication *UK plant-based foods retail market insights: 2021 to 2023 with initial insights into the 2024 market,* which is also based on Circana data, **covered nine plant-based categories (including ready meals, ice cream and chilled desserts),** whereas the current report covers only six categories. Further changes include a refinement of the product lists covered in each category.

This means the sales totals from that report are not directly comparable to figures in this report.

Note also that since a different data provider has been used, with different product category definitions and coverage, the numbers in this report are not directly comparable to those in GFI Europe's other previous publication, *Market insights on European plant-based sales 2020-2022*.

Key terms

Plant-based: foods that are made from plants. Where data permits, we have focused specifically on plant-based products that aim to mimic the taste and texture of animal products. In some categories, non-analogue products such as those based on beans or lentils are also included because the data does not permit further subcategorisation.

Animal-based: food derived from animals, such as meat from pigs or milk from cows.

Plant-based meat: foods made from plants or fungi that are designed to be similar to animal-based meat in taste and texture. The Circana data for plant-based meat in the UK includes only those products that are direct substitutes for meat. Plant-based meat products may contain small amounts of egg or dairy, but plant-based ingredients like soy or pea are the main protein sources. Plant-based meat does not include tofu, tempeh, seitan or non-analogue products such as bean burgers – these categories have been reported separately for context.

Plant-based milk and drinks: drinks made from plants such as soy or oat that are intended to mimic the taste and performance of animal-based dairy milk. The plant-based milk and drinks category includes plain and flavoured plant-based milks as well as some other drinks containing a dairy alternative component, such as coffee drinks. It does not include fruit juices or other drinks not designed to replicate dairy.

Market share: the proportion of all sales in a wider product category (comprising both plant-based and animal-based versions) that is plant-based. This is calculated by dividing plant-based sales by the sum of plant-based and animal-based sales. Market share can be calculated on the basis of sales volume or sales value. Note that in this report, market share is calculated based only on retail sales of pre-packaged products.

Private label: products that are sold under the label of a retailer, as opposed to branded products. Also known as supermarket own-brand products.

Sales value: the total value of sales measured in pounds (£).

Sales volume: the total quantity of products sold measured in kilograms (kg) or litres (l), depending on the product category.

Unit sales: the total number of units of a product sold. A unit can refer to a pack, carton or tub, for instance.

Overall plant-based food market

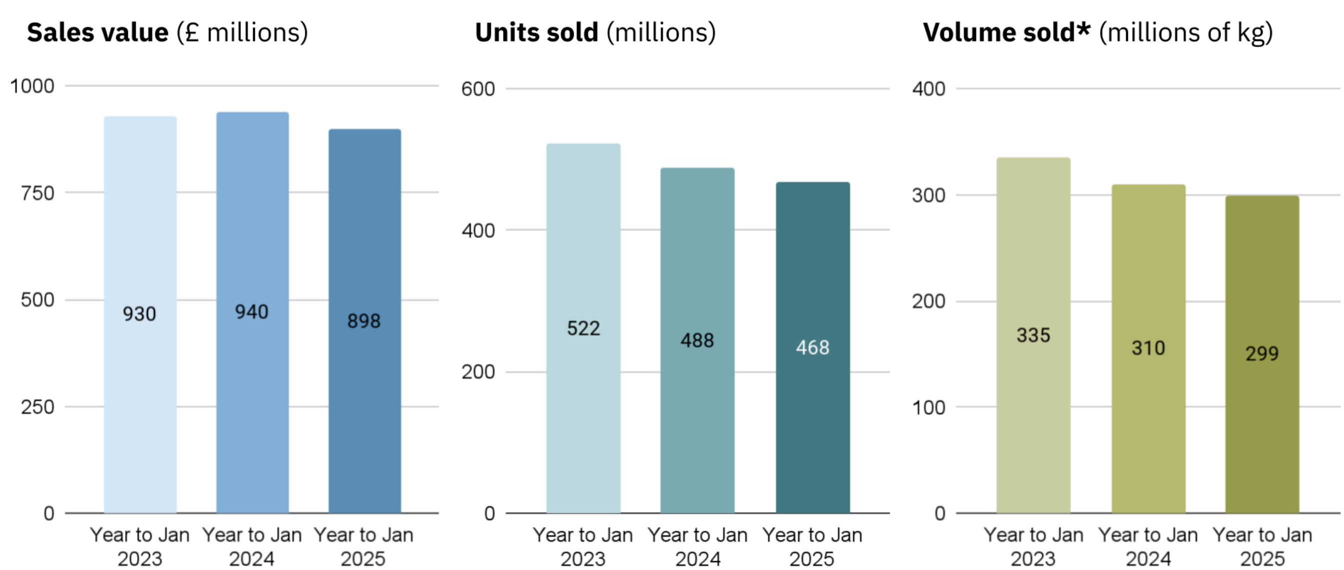
Total UK plant-based market

Demand for plant-based foods in the UK has fallen, but the rate of decline in sales volume has slowed.

Annual sales value across six plant-based categories (meat, seafood, milk and drinks, cheese, yoghurt and chilled cream) remained level in the year to January 2024, then fell by 4.5% to £898 million in the year to January 2025. Unit sales fell across the three-year time period, but the year-on-year rate of decline slowed from 6.5% in the year to January 2024 to 4.2% in the year to January 2025, when unit sales were 468 million. Similarly, the year-on-year rate of decrease in sales volume fell from 7.4% in the year to January 2024 to 3.5% in the year to January 2025, when sales volume was 299 million kg.

The fact that sales value remained level in the year to January 2024 while sales volume fell reflected rising prices, in line with the record-breaking inflation experienced by the UK's wider food sector during 2023, contributing to the UK's cost-of-living crisis.

Plant-based food sales across six categories in the UK, year to January 2023-year to January 2025



Sales volume was measured in litres for milk and drinks and chilled cream, and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg.

Categories

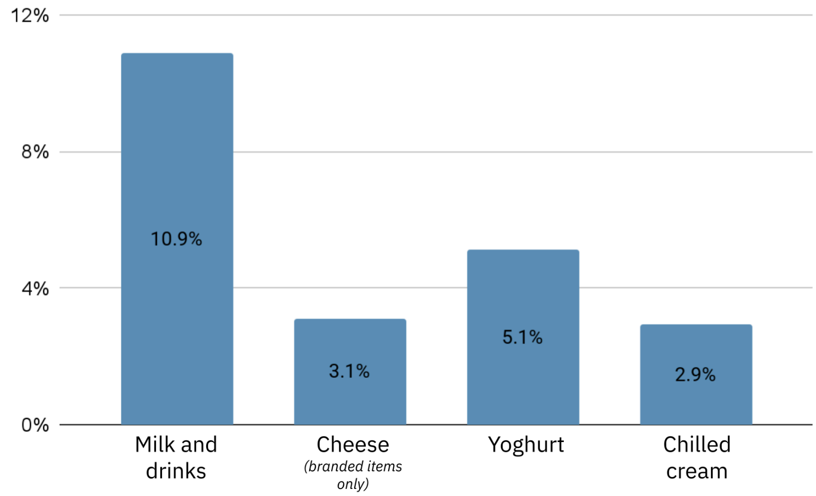
Milk and drinks is the category[1] closest to mainstream status in the UK: it accounted for 10.9% of sales value and 6.7% of sales volume of the total milk and dairy drinks market in the year to January 2025.

It also had the largest sales value of the six plant-based categories in this report, accounting for 46% of total plant-based sales value in the year to January 2025.

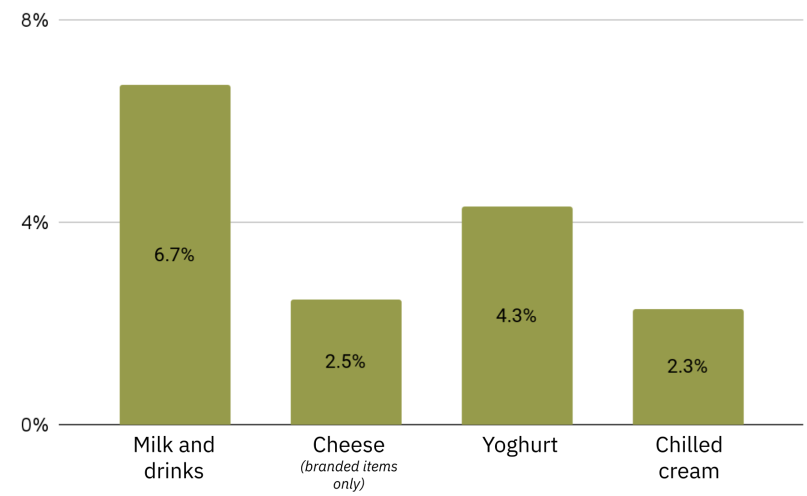
Plant-based meat was the second-largest category, accounting for 37% of plant-based sales value during the same time period.

Plant-based cheese and chilled cream remained small categories in terms of market share. Plant-based cheese experienced impressive growth in both sales value and sales volume in the year to January 2024, but sales value levelled out in the year to January 2025 while sales volume fell slightly.

Plant-based food: share of the UK's total pre-packaged (plant- and animal-based) sales for each category, year to January 2025
(% of sales value)



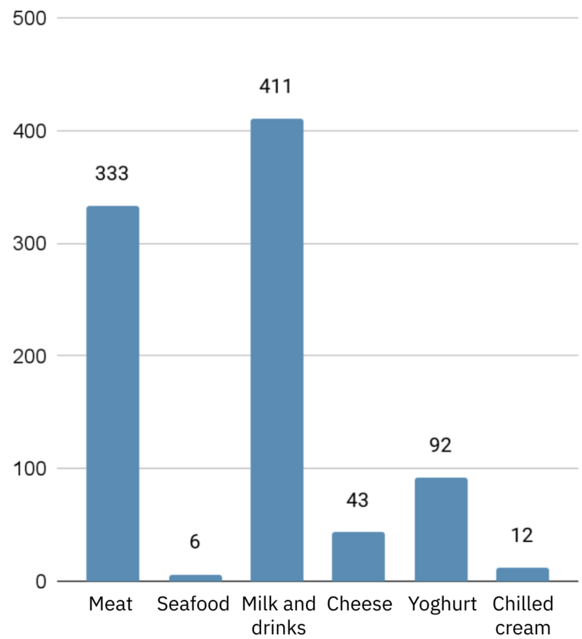
Plant-based food: share of the UK's total pre-packaged (plant- and animal-based) sales for each category, year to January 2025
(% of sales volume)



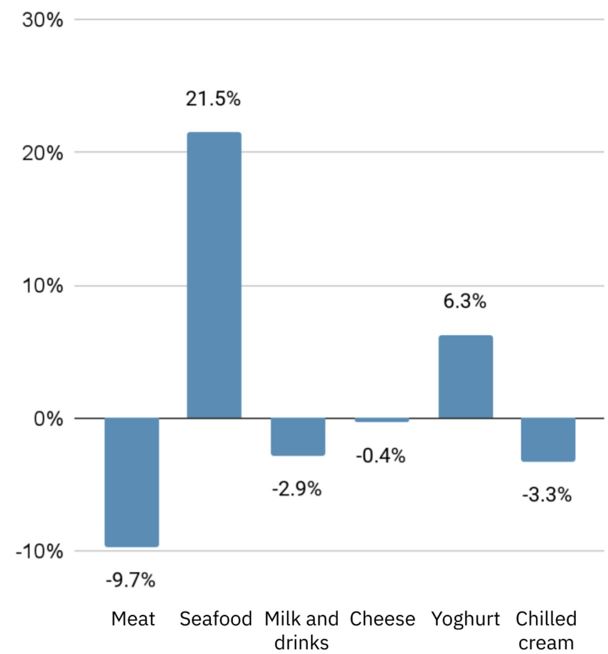
Plant-based seafood – a small category – showed significant growth in sales value in the year to January 2025, alongside moderate growth in sales volume.

[1] Note that the Circana dataset did not include complete data on animal-based meat and seafood, and it was therefore not possible to calculate market shares for plant-based meat and seafood.

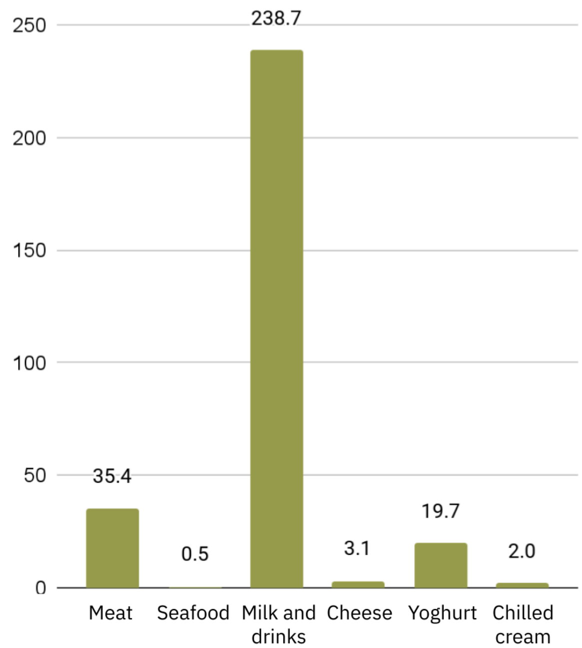
Plant-based food sales value by category in the UK, year to January 2025 (£ millions)



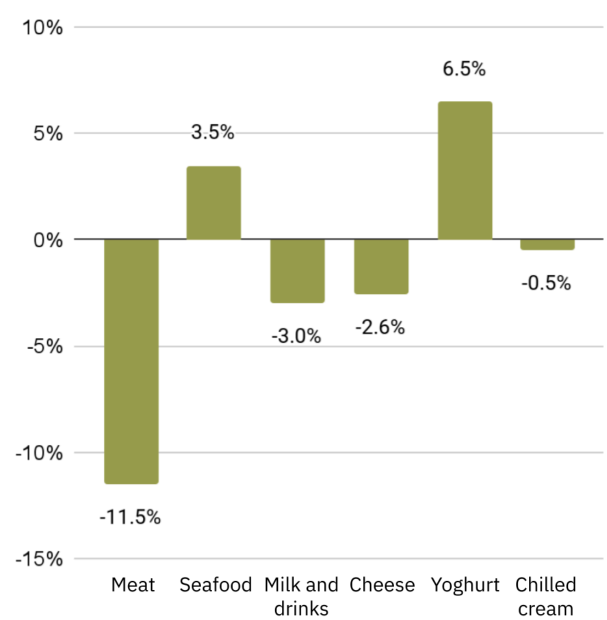
Change in the sales value of plant-based foods in the UK, year to January 2024-year to January 2025 (%)



Plant-based food sales volume by category in the UK, year to January 2025 (millions of kg)



Change in the sales volume of plant-based foods in the UK, year to January 2024-year to January 2025 (%)



Branded versus private label

Private-label products – ie, supermarket own-label products – made up only a small share of the UK's plant-based market, at 10% of total sales value in the year to January 2025.

The sales volume of private-label products also fell more than that of branded products. In the year to January 2025, the sales volume of private-label products was down by 8.9%, while that of branded products was down by only 2.3%.

The relative success of branded products, despite their generally higher prices per kg, suggests that price may have become a less important factor in driving existing consumers' plant-based choices, potentially because falling food sector inflation has reduced pressure on consumer spending power. In this context, other factors such as taste or (actual or perceived) quality are likely to have greater influence on consumers.

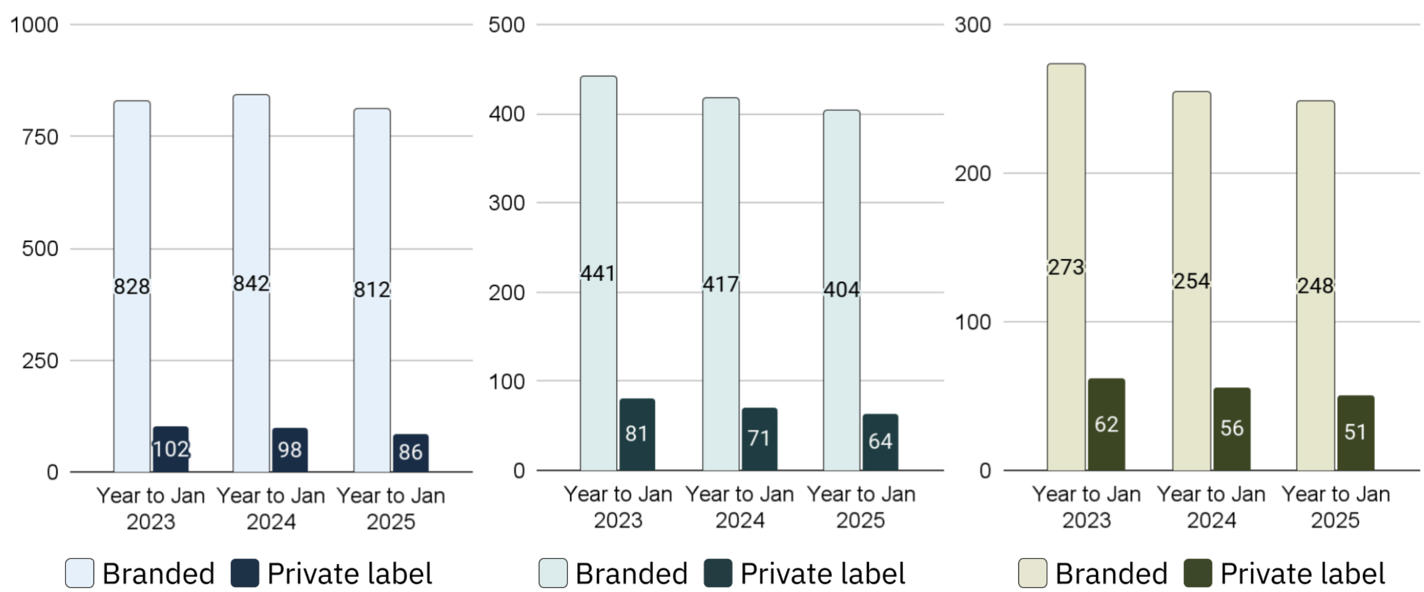
Plant-based sales and growth rates across six* product categories in the UK, branded versus private label, year to January 2023-year to January 2025

	Sales value			Unit sales			Sales volume		
	Year to Jan 2025, £ million	Year to Jan 24 - Year to Jan 25 change	Year to Jan 23 - Year to Jan 25 change	Year to Jan 2025, million units	Year to Jan 24 - Year to Jan 25 change	Year to Jan 23 - Year to Jan 25 change	Year to Jan 2025, million kg	Year to Jan 24 - Year to Jan 25 change	Year to Jan 23 - Year to Jan 25 change
Branded	812	-3.5%	-1.9%	404	-3.1%	-8.4%	248	-2.3%	-9.1%
Private label	86	-12.5%	-15.6%	64	-10.2%	-20.9%	51	-8.9%	-17.3%

**Note that the dataset does not cover private-label plant-based cheese.*

Plant-based food sales across six categories in the UK, branded versus private label, year to January 2023-year to January 2025

Sales value (£ millions) **Units sold** (millions) **Volume sold*** (millions of kg)



**Sales volume was measured in litres for milk and drinks and chilled cream, and in kg for all other categories. For the total sales volume, the data has been combined by assuming that 1 litre weighs approximately 1kg. The dataset does not cover private-label plant-based cheese.*

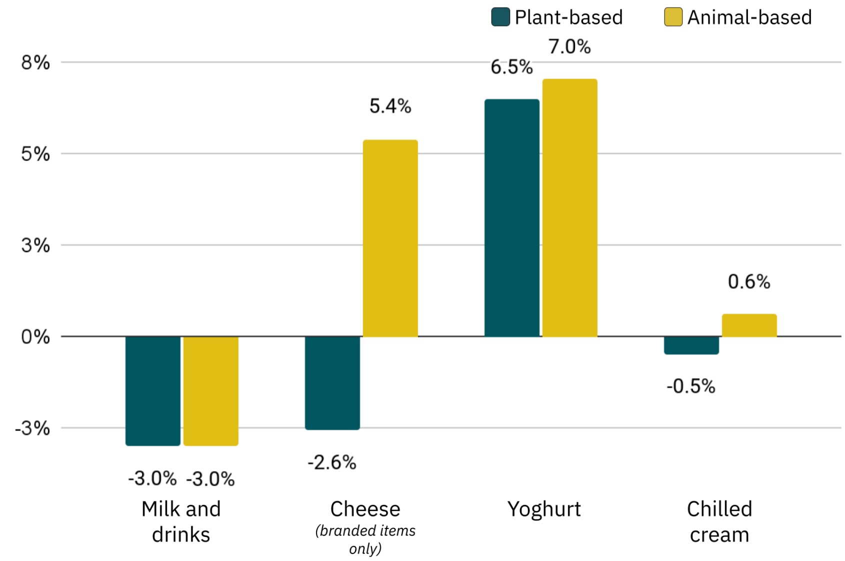
Price trends

For the categories where comparable animal-based data was available, the changes in sales volume in the year to January 2025 were comparable between plant- and animal-based products for milk and drinks (both fell), yoghurt (both rose) and chilled cream (both remained level).

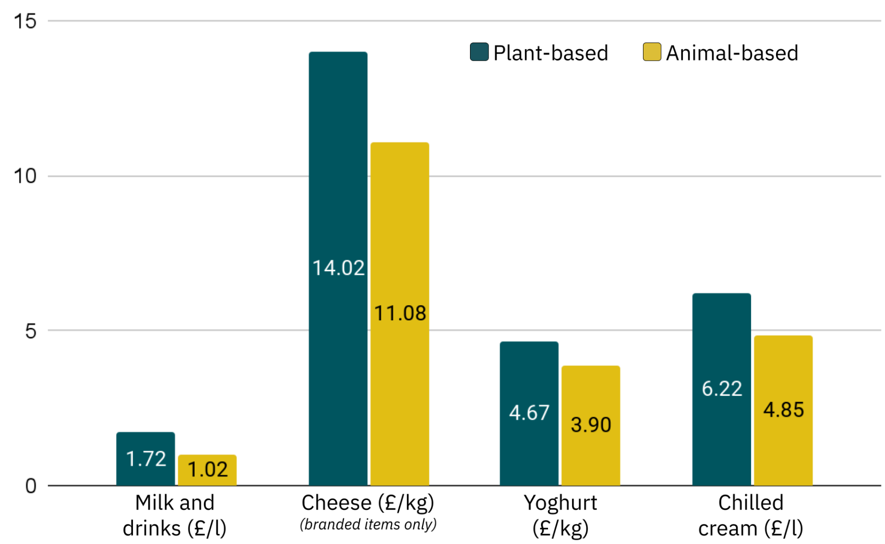
The exception is cheese, where the sales volume of plant-based cheese fell (after strong growth the year before) while that of animal-based cheese grew. Note that the dataset covered only branded cheeses, not private-label.

Plant-based products are still, on average, more expensive than their animal-based equivalents, although there are exceptions in some segments. For example, branded plant-based chilled cream was comparable in price to branded animal-based chilled cream across the whole three-year period.

Change in the sales volume of pre-packaged plant- and animal-based foods, year to January 2024-year to January 2025 in the UK (%)



Average price per kg or litre of plant- and animal-based foods in the UK, year to January 2025 (£ per kg or l)



Household purchase patterns

The retail sales data from Circana, on which most of this report is based, shows trends in supermarket purchases. However, it does not give any information about how frequently consumers are buying plant-based foods.

For a complementary view, GFI Europe obtained household panel data from NIQ Homescan. This tracks trends in foods purchased and brought home by a panel of 30,000 households. The data is nationally representative of households in the UK.

The results track the proportions of households that purchased either plant-based meat or plant-based milk at least once per year, at least six times per year and at least 12 times per year (frequent purchasers).

The proportion of households that bought plant-based meat at least once per year fell from 38.7% in 2022 to 31.6% in 2024, while the proportion of frequent purchasers also fell from 10.4% to 8.6%.

For plant-based milk, the household data shows a slight rise in the proportion of households purchasing plant-based milk at least once a year, from 30.5% in 2022 to 31.8% in 2024, driven mainly by a slight rise in the proportion of frequent purchasers.

The household panel data also shows that the proportion of sales value from discounter stores (such as Aldi and Lidl), which are not covered in the Circana retail sales data, rose between 2022 and 2024 for both product categories.

Household purchase patterns for plant-based foods in the UK, 2022-2024

UK	% buying at least once per year			% buying 6 or more times per year			% buying 12 or more times per year			% of sales value from discounter stores		
	2022	2023	2024	2022	2023	2024	2022	2023	2024	2022	2023	2024
Plant-based meat	38.7%	35.4%	31.6%	16.4%	14.9%	13.2%	10.4%	9.5%	8.6%	9.8%	11.5%	11.8%
Plant-based milk	30.5%	31.1%	31.8%	14.9%	15.7%	16.0%	10.0%	10.6%	10.8%	17.6%	22.7%	21.6%

Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in the UK. The data covers 'Take Home' shopping and comes from a sample of 30,000 households. Data covers "plant-based meat substitutes" and "plant-based milk".

Plant-based meat

Total market

The market for plant-based meat in the UK is falling steadily, although household panel data shows that discounter stores (not covered by Circana's data) account for a rising share of the plant-based meat market.

In the year to January 2025, total sales value was £333 million – a decrease of 9.7% compared to the previous year and of 15.5% compared to two years prior. Unit sales were 145 million, representing a fall of 11% over one year and 21% over two years. Sales volume was 35.4 million kg, down by 12% over one year and by 22% over two years.

In this report, plant-based meat is defined as those products that aim to replicate the taste and texture of meat.[2] For comparison, the sales volume of vegan non-analogue meat alternatives[3] such as bean burgers was 6.4 million kg in the year to January 2025, 24% lower than two years previously. The sales volume of plant-based meat was over five times higher than these products, showing the continued importance to consumers of alternatives that look, taste and cook like meat.

Separately, the annual sales volume of tofu was 10% higher in the year to January 2025 compared to the previous year, possibly driven by its relative affordability (£8.01/kg in the most recent time period, compared to £9.42 for plant-based meat). The sales volume of tempeh and seitan, although tiny, was 85% higher in the year to January 2025 than in the previous year. Tempeh and seitan cost an average of £10.13/kg and £12.47/kg, respectively, in the year to January 2025. The relative performance of these foods in percentage terms may be a response to widespread media concern over ultra-processed foods in the UK, although the absolute increase in uptake of tofu, tempeh and seitan was far smaller than the corresponding drop in plant-based meat sales. While conventional meat data was not available from Circana, other data sources published by the ADHB suggest red meat saw particularly strong growth in 2024.

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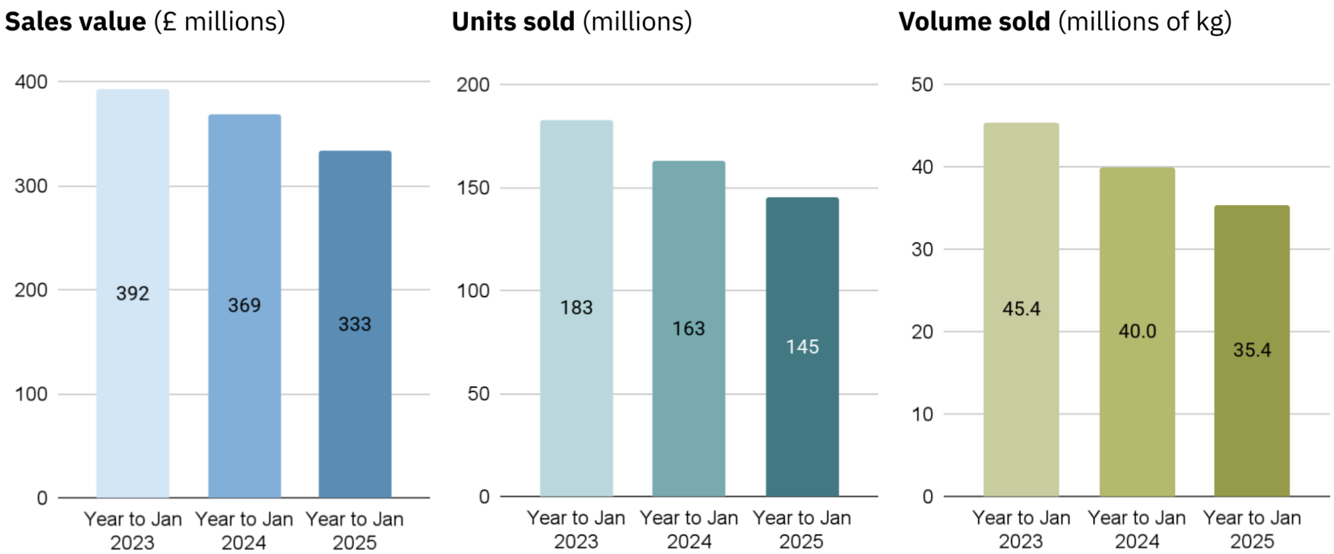
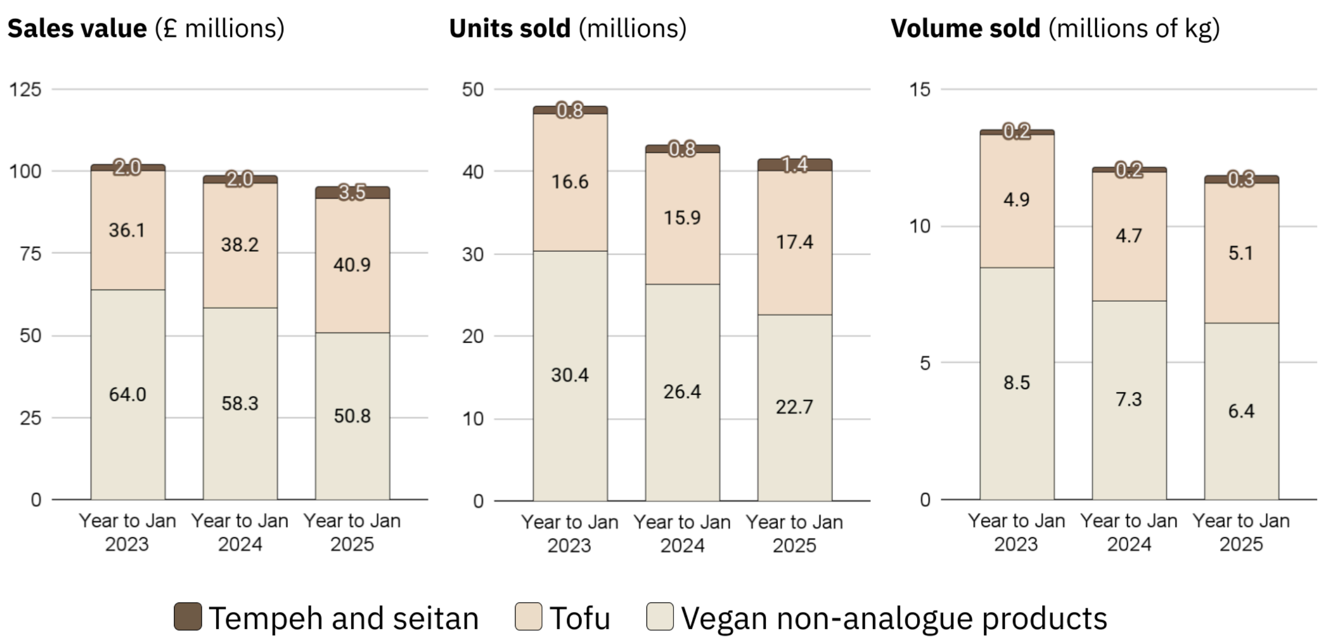
[2] It includes some products that are primarily based on plant-based ingredients but also incidentally contain small amounts of dairy or egg.
[3] Those based on vegetables, lentils, beans, or jackfruit that are not marketed as mimicking meat (for example bean burgers or a mushroom wellington), but excluding items based primarily on egg or dairy, such as quiche.

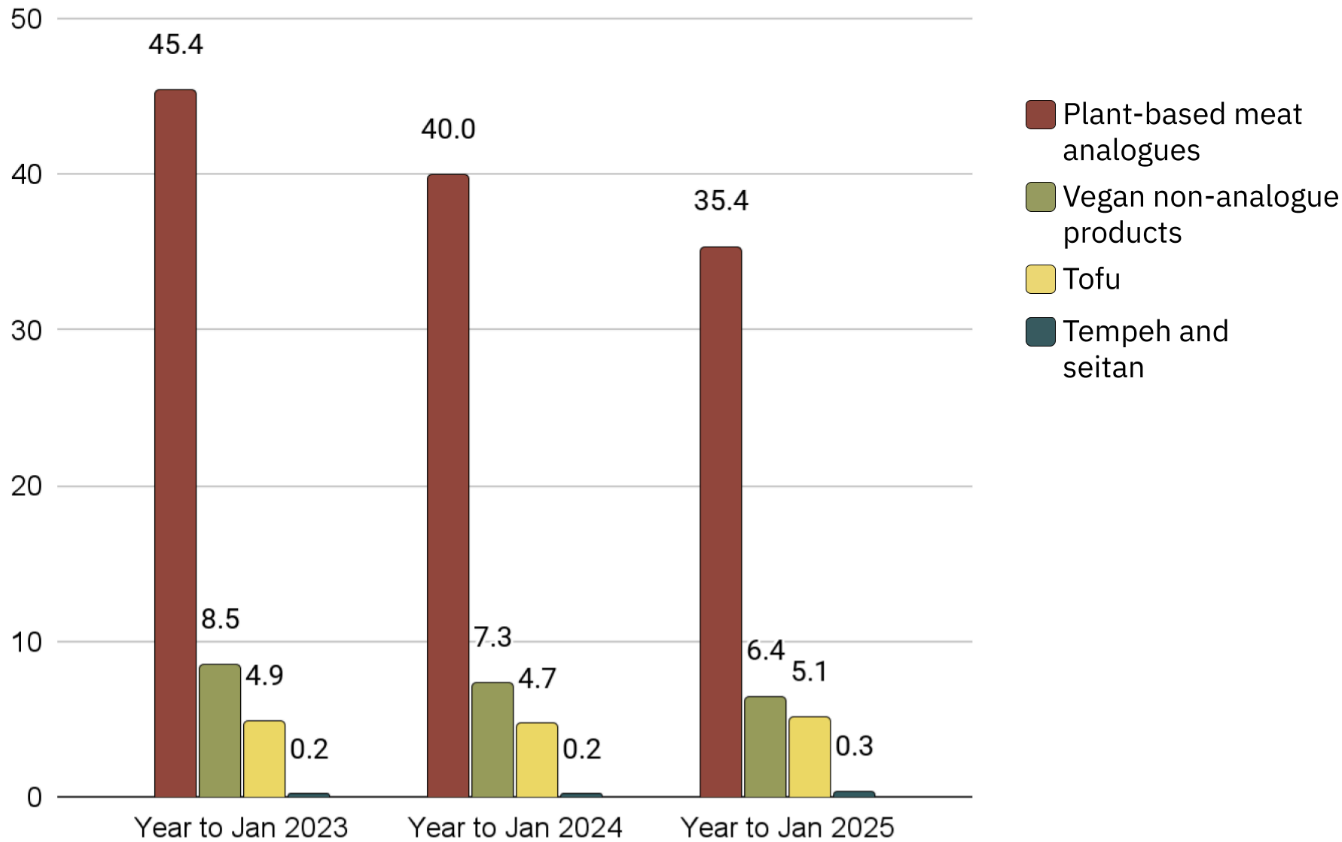
Plant-based meat sales in the UK, year to January 2023-year to January 2025



Vegan non-analogue products, tofu, seitan and tempeh sales in the UK, year to January 2023-year to January 2025



Sales volume of plant-based meat versus other meat alternatives in the UK, year to January 2023-year to January 2025, million kg



Branded versus private label

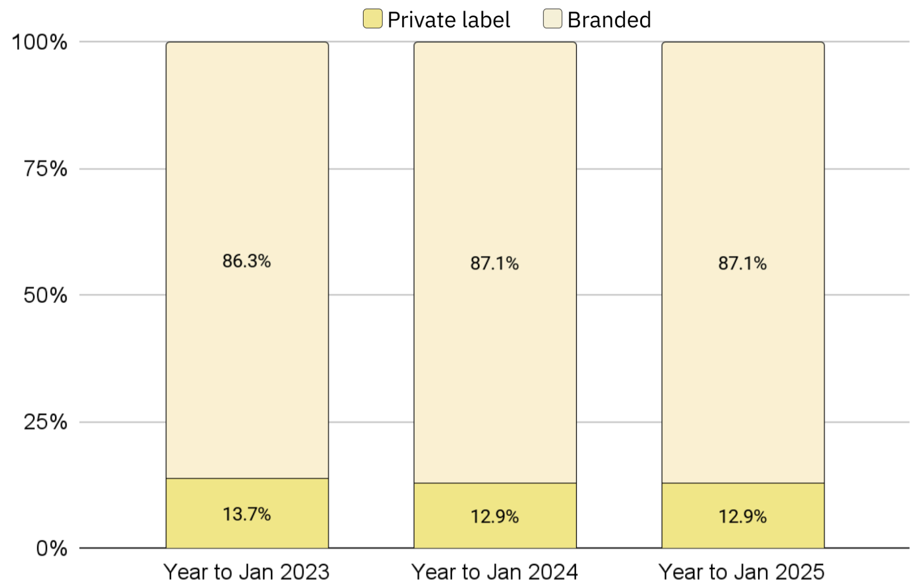
Private-label plant-based meat products (supermarket own-brand products) are, on average, cheaper per kg than branded products (by 34% in the year to January 2025).

However, they account for only a small proportion of overall sales volume, at around 13%, suggesting that other factors, such as taste, draw consumers towards the relatively expensive branded options.

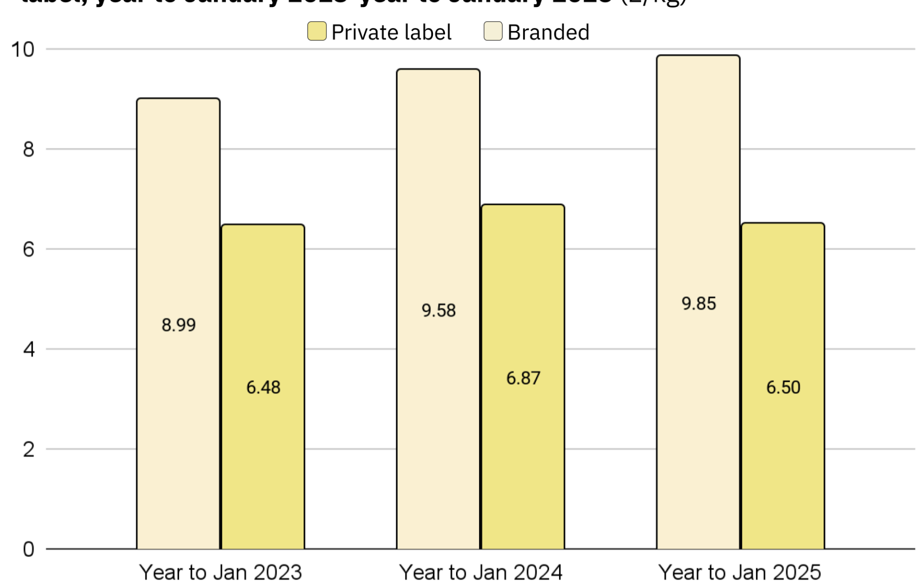
This proportion has remained roughly steady, as both branded and private-label sales volumes have fallen at a similar rate.

Note that the Circana data does not cover discounter stores. Both Aldi and Lidl have expanded their own ranges of plant-based products, including plant-based meat. See the household panel section below for trends in discounter sales.

UK plant-based meat sales by branded or private label, year to January 2023-year to January 2025 (% of sales volume)



Average price per kg of plant-based meat in the UK, by branded or private label, year to January 2023-year to January 2025 (£/kg)

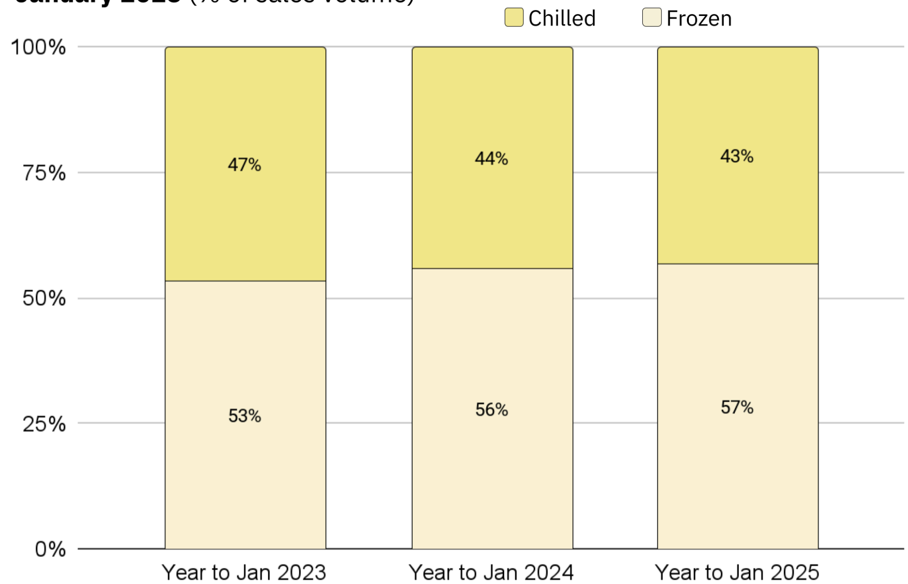


Product format breakdown

There has been a slight shift towards frozen plant-based meat, which rose from 53% of sales volume in the year to January 2023 to 57% in the year to January 2025.

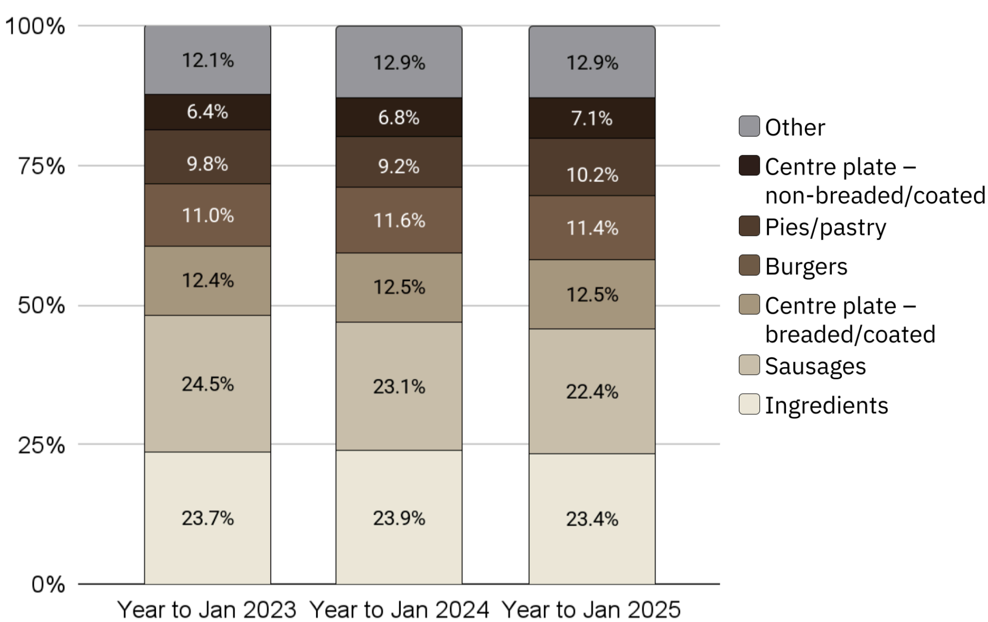
The shift may have been driven by the relative affordability of frozen products, which were 40% cheaper per kg than chilled products in the most recent time period.

UK plant-based meat sales by temperature, year to January 2023-year to January 2025 (% of sales volume)



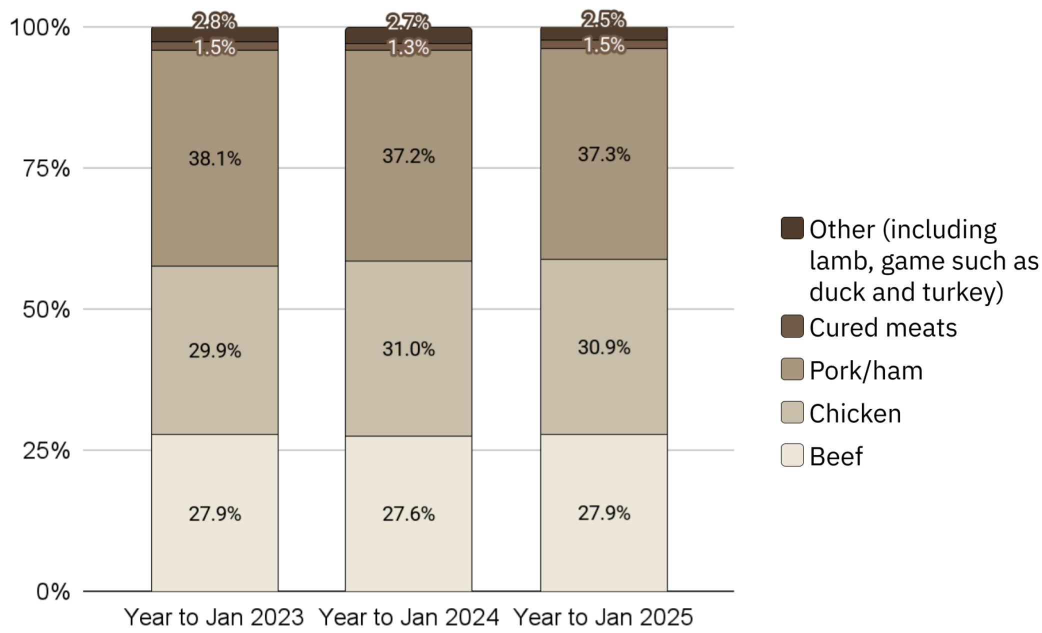
The UK's plant-based market is diverse, with many different product formats available. Ingredients (as defined by Circana, including mince, meatballs and pieces) led the market at 23% of sales volume in the year to 2024, followed by sausages (22%), breaded or coated centre-plate items (13%) and burgers (11%).

UK plant-based meat sales by format, year to January 2023-year to January 2025 (% of sales volume)



Red meat alternatives are the most common, with plant-based pork and ham accounting for 37% of sales volume and plant-based beef accounting for a further 28% in the year to January 2025. Red meat is the animal-based category that UK consumers are most likely to report having reduced during 2024, according to research by GFI Europe, HarrisX and Plant Futures, and many of these red meat reducers report having consumed plant-based meat in the last month.

UK plant-based meat sales by type, year to January 2023-year to January 2025 (% of sales volume)

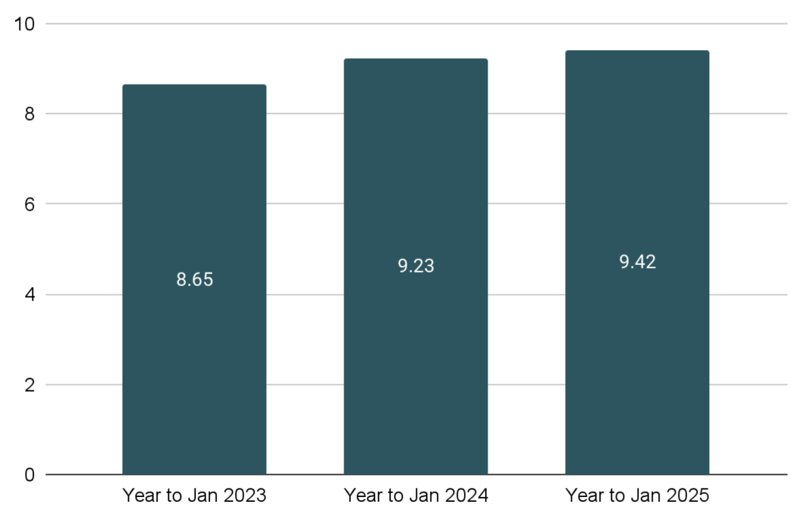


Price trends

The average price of plant-based meat rose in the year to January 2024, in line with high inflation across the UK's broader food sector during 2023.

The increase in the year to January 2025 was lower, reflecting a fall in inflation.

Average price per kg for plant-based meat in the UK, year to January 2023-year to January 2025 (£/kg)



Household panel data

For a complementary view of purchase patterns, data from NIQ's Homescan consumer panel shows the frequency with which a representative panel of consumers in the UK brought home plant-based meat products. The two sources of data (NIQ Homescan and Circana's retail sales data) are not directly comparable, as they define the plant-based meat category differently and NIQ covers discounter stores whereas Circana does not. However, comparing the trends across the two sources allows some broad conclusions to be drawn.

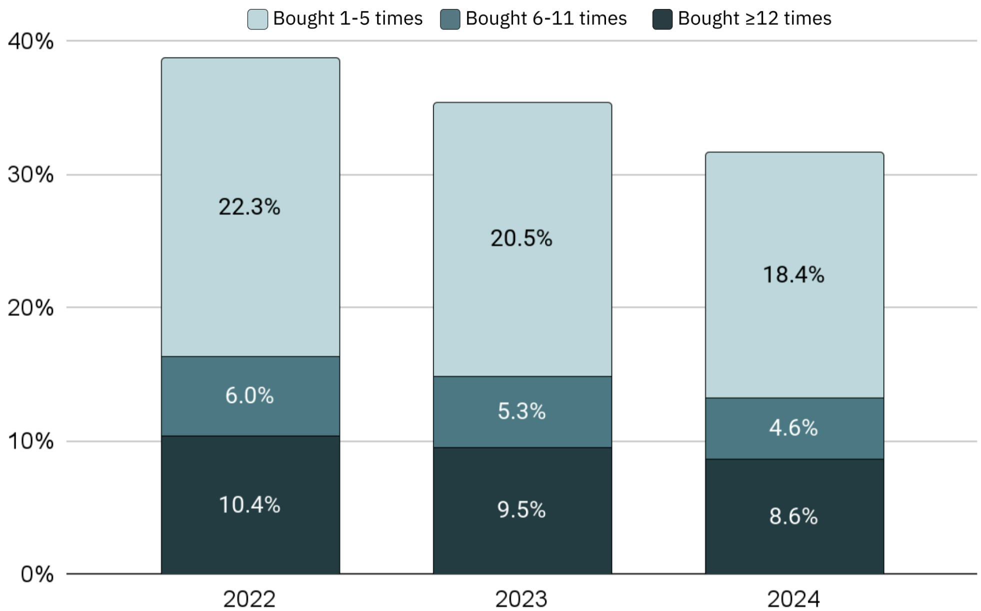
The NIQ Homescan data shows that the proportion of households in the UK that bought plant-based meat at least once a year fell from 38.7% in 2022 to 31.6% in 2024. The proportion of households classed as frequent purchasers (buying plant-based meat an average of at least once a month) has also fallen, from 10.4% in 2022 to 8.6% in 2024.

These overall trends correspond roughly with the falling sales volume shown in the Circana dataset, which showed a 21% fall in annual unit sales during the three years covered. It is possible that the slightly greater fall seen in the Circana data can be attributed to the NIQ data including sales from discounter stores, while the Circana data does not cover these.

According to NIQ, the proportion of plant-based meat sales value from discounter stores rose from 9.8% in 2022 to 11.8% in 2024. This may have been driven by the UK's cost-of-living crisis.

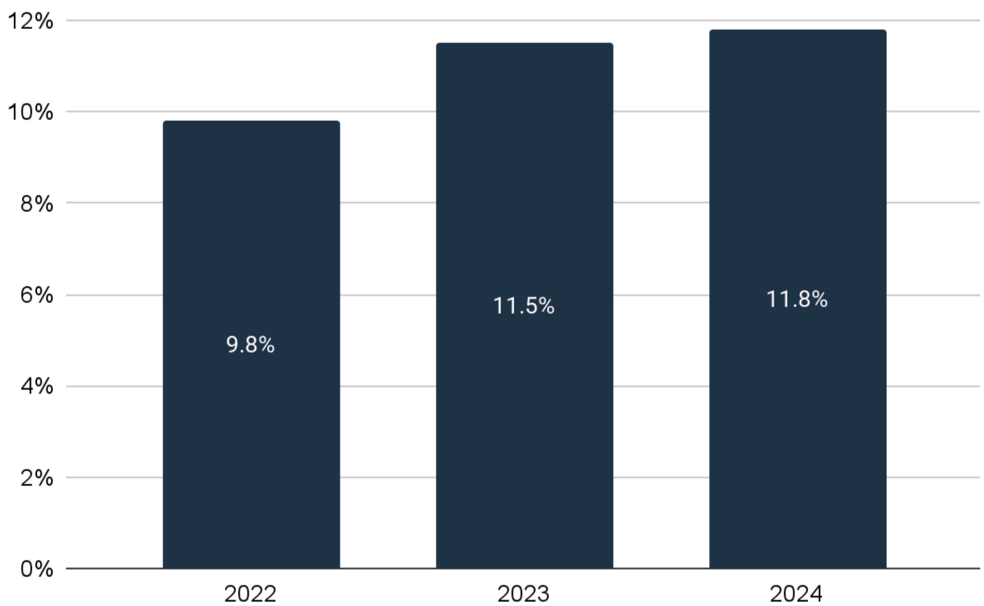
NIQ estimates that the sales value of plant-based meat from supermarkets and discounter stores has fallen by just 11.4% between 2022 and 2024, compared to the 15.5% fall in supermarkets reported over the three years ending January 2025 by Circana.

Annual household purchase patterns for plant-based meat in the UK, 2022-2024 (% of households)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in the UK. The data covers 'Take Home' shopping and comes from a sample of 30,000 households. Data covers "plant-based meat substitutes".

Household purchase patterns for plant-based meat in the UK: proportion of sales value from discounter stores, 2022-2024 (%)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in the UK. The data covers 'Take Home' shopping and comes from a sample of 30,000 households. Data covers "plant-based meat substitutes".

Plant-based seafood

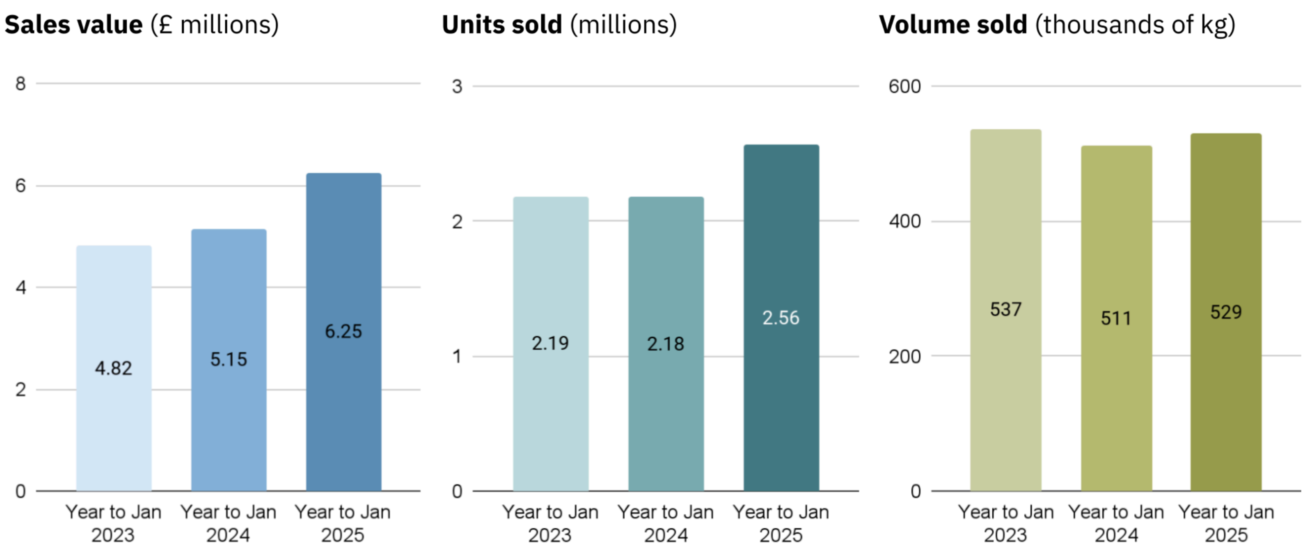
Total market

The sales volume of plant-based seafood (for example, plant-based salmon, prawns and tuna) in the UK has rebounded.

Annual sales volume rose by 3.5% to 529,000kg in the year to January 2025, almost reaching the same sales volume as in the year to January 2023. Unit sales were level and then rose by 17.6% in the year to January 2025, reaching 2.56 million units.

Sales value, on the other hand, rose continuously, reflecting rising prices. Annual sales totalled £6.25 million in the year to January 2025 – 21.5% higher than the previous year and 29.8% higher than two years previously.

Plant-based seafood sales in the UK, year to January 2023-year to January 2025



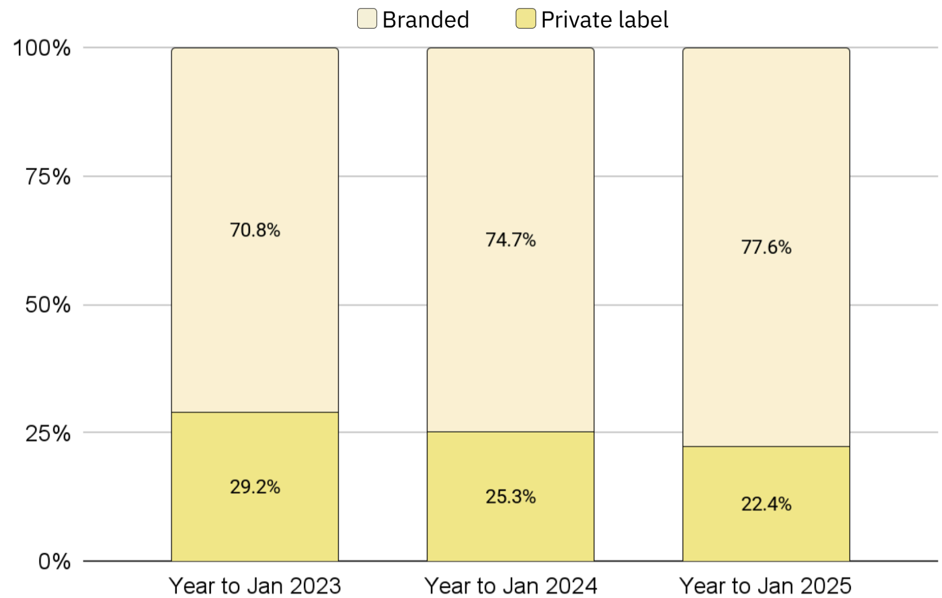
Branded versus private label

The proportion of plant-based seafood that is private label fell from 29.2% of sales volume in the year to January 2023 to 22.4% in the year to January 2025.

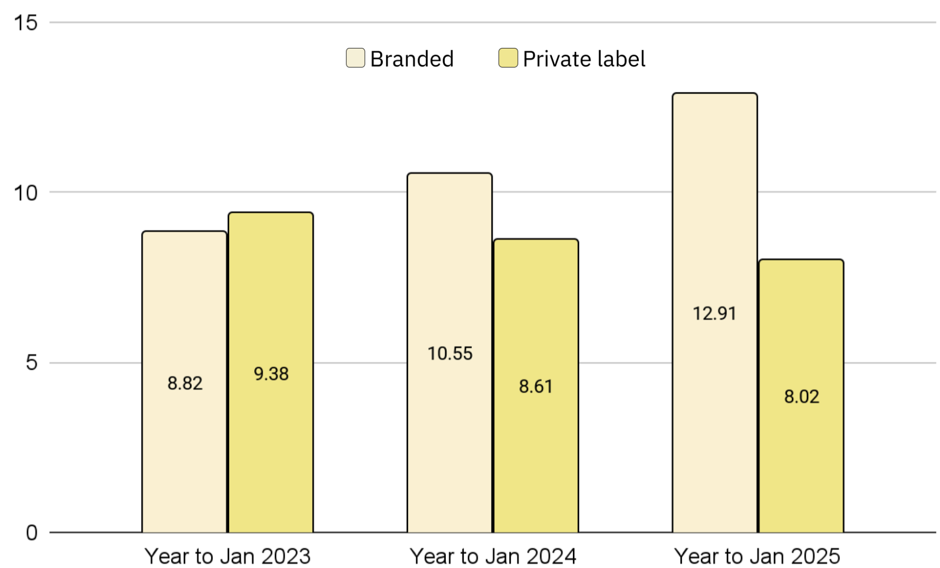
This fall (which also reflects a fall in absolute sales volume) happened in spite of the falling price of private-label products. Branded products went from being 6.4% *cheaper* per kg than private-label products, on average, to 37.9% more expensive, likely due to a shift in branded product sales away from relatively cheap fish finger formats and towards higher-end formats such as unbreaded fish fillets.

The fact that the sales volume of branded plant-based seafood has increased, despite this considerable and widening price gap, suggests that other factors are drawing consumers towards branded products.

UK plant-based seafood sales by branded or private label, year to January 2023-year to January 2025 (% of sales volume)



Average price per kg of plant-based seafood in the UK, by branded or private label, year to January 2023-year to January 2025 (£/kg)



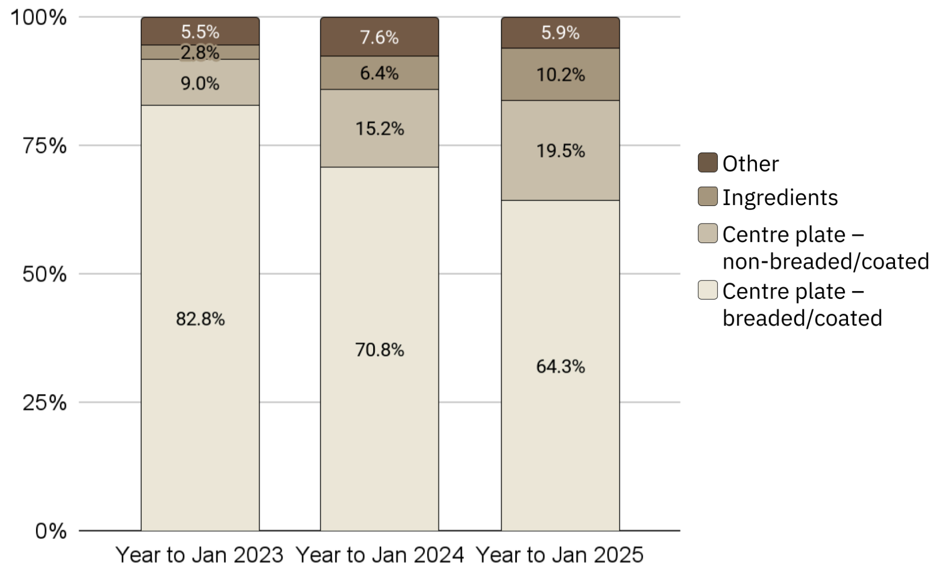
Product format breakdown

Centre-plate breaded/coated items, such as fish fingers and fishcakes, made up the majority of sales volume. However, the market is becoming more diverse as sales of other formats, such as unbreaded fish fillets, gained market share. As these newer formats also tend to be more expensive, this may explain why branded products have risen significantly in price.

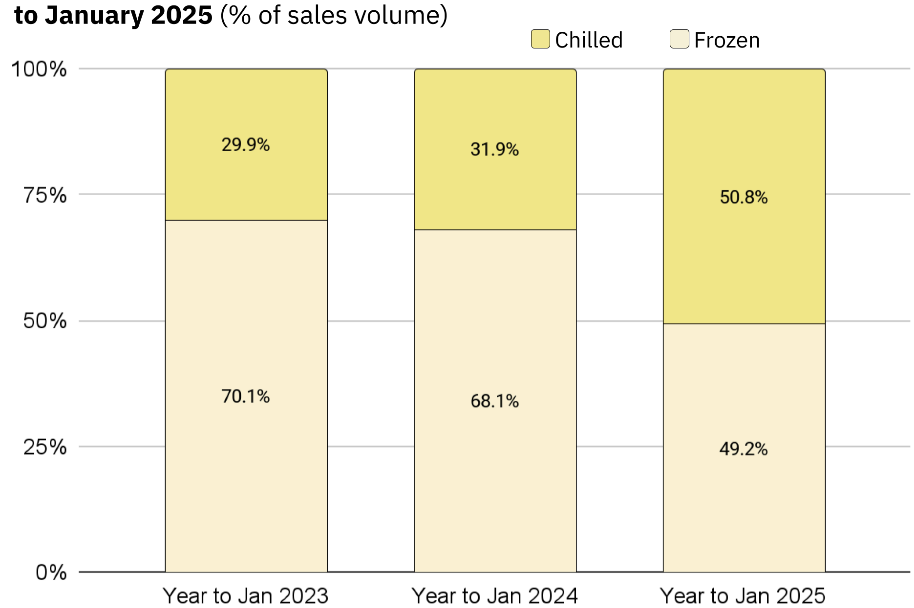
There was a jump in the plant-based market share of chilled products from 31.9% of sales volume in the year to January 2024 to 50.8% in the year to January 2025.

The success of chilled plant-based seafood products, despite their being 73% more expensive per kg than frozen products in the last time period, again indicates that price was not the primary factor driving sales. It is also possible that consumers are attracted by a more diverse product selection in the chilled aisle – whereas frozen products are predominantly breaded formats such as fish fingers, the chilled aisle is offering an increasingly diverse range of formats such as unbreaded fillets, slices and flakes.

UK plant-based seafood sales by format, year to January 2023-year to January 2025 (% of sales volume)



UK plant-based seafood sales by temperature, year to January 2023-year to January 2025 (% of sales volume)



Price trends

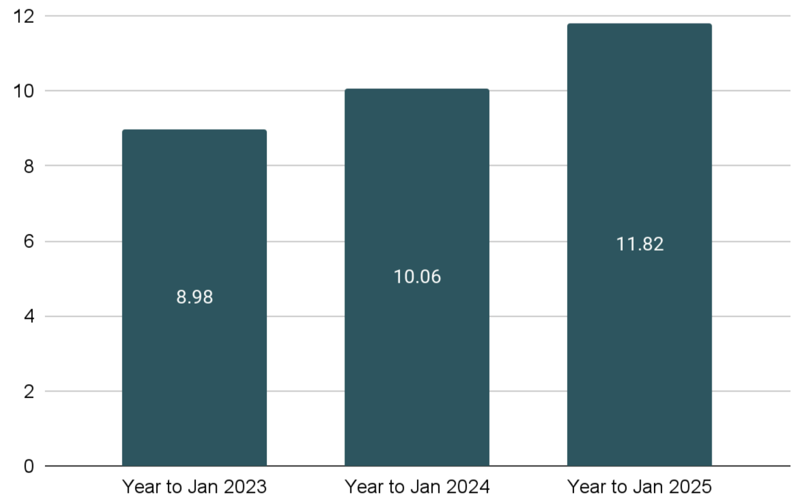
In line with the rising sales of relatively expensive branded products, the average price per kg of plant-based seafood has risen over the three-year time period.

Complete data on the corresponding animal-based seafood was not available in this Circana dataset. However, data was available for frozen animal-based fish.

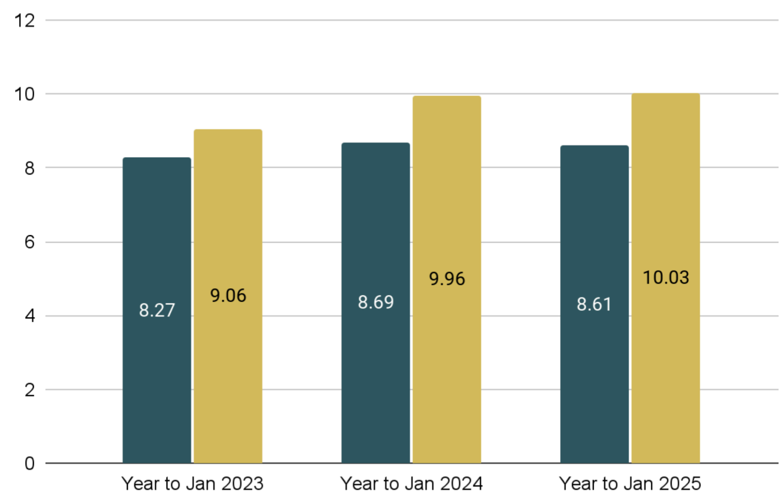
Frozen plant-based seafood was 9% cheaper than frozen animal-based fish in the year to January 2023. By the year to January 2025, this gap had widened to 14%.

This price gap is likely due to frozen plant-based seafood consisting mostly of relatively cheap formats such as fish fingers, whereas the frozen animal-based fish category contains a wide array of relatively expensive products such as lobster and monkfish.

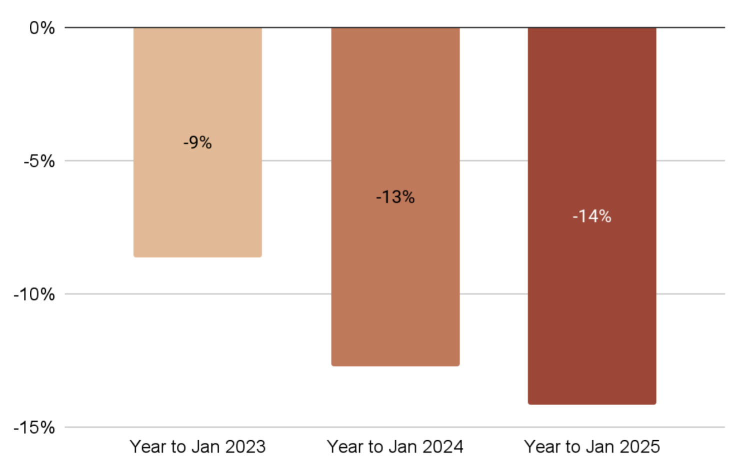
Average price per kg for plant-based seafood in the UK, year to January 2023-year to January 2025 (£/kg)



Average price per kg for plant- and animal-based seafood in the UK, frozen products only, year to January 2023-year to January 2025 (£/kg)



Price difference for frozen plant-based seafood compared to frozen animal-based fish in the UK, year to January 2023-year to January 2025
(% difference based on £/kg)



Plant-based milk and drinks

Total market

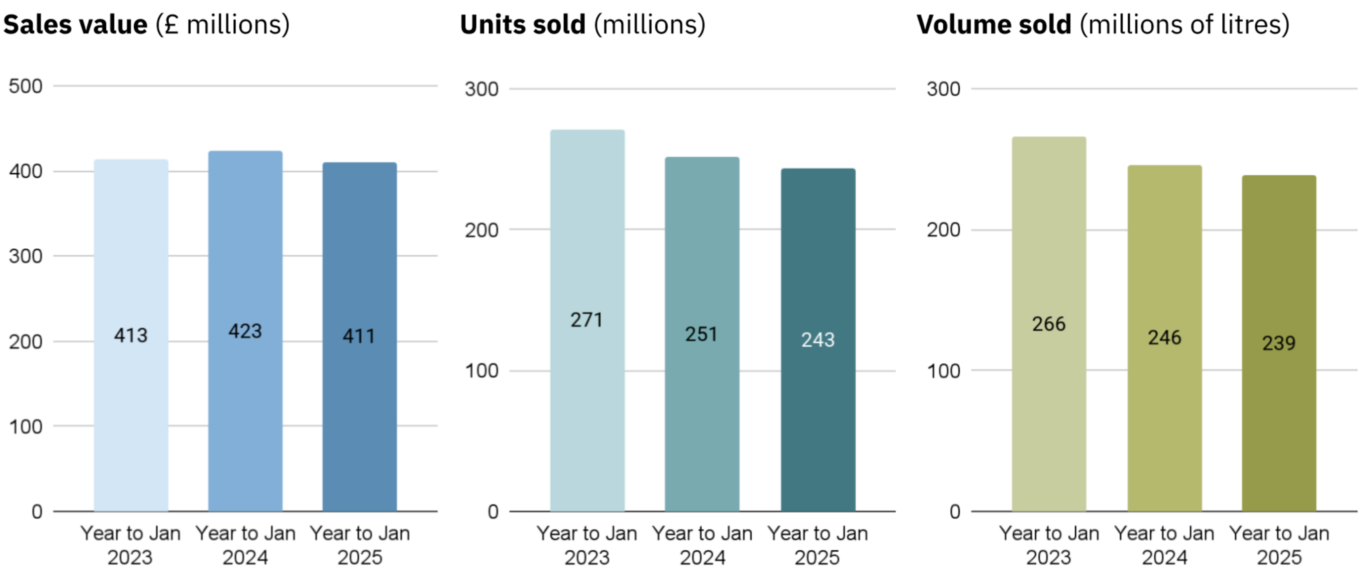
The sales volume of plant-based milk and drinks[4] has fallen, but the rate of decline has slowed.

Sales volume was 239 million litres in the year to January 2025, down by 3.0% from the previous year and down by 10.2% from two years previously.

Annual sales value was £411 million in the year to January 2025, which was 2.9% lower than in the previous year but roughly level with the year to January 2023. Unit sales were 243 million in the year to January 2025, a year-on-year drop of 3.2% and a two-year drop of 10.2%.

The disparity between sales value and sales volume trends in the year to January 2024 reflects a jump in the average price per litre during that time, in line with record inflation across the UK's food sector during 2023.

Plant-based milk and drinks sales in the UK, year to January 2023-year to January 2025



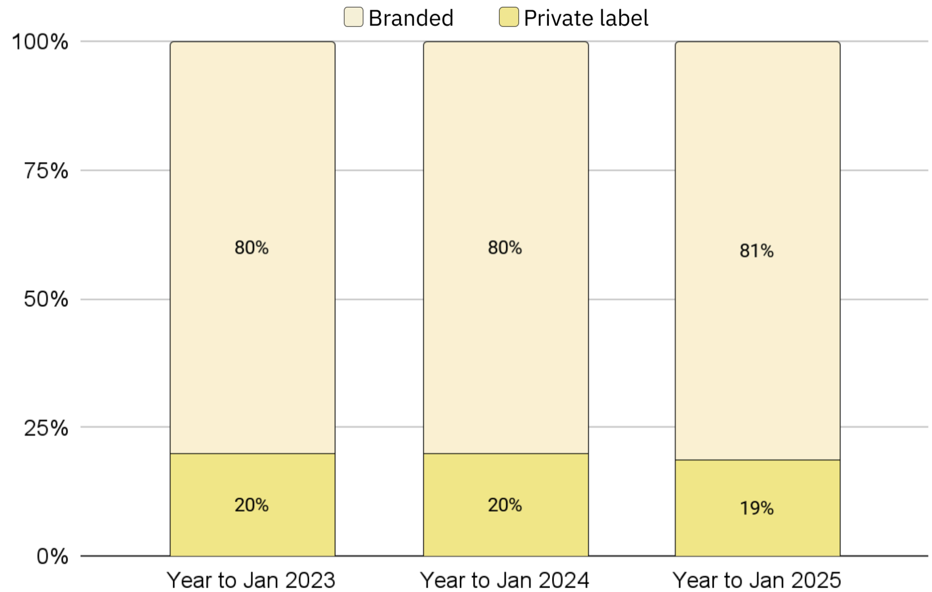
[4] The plant-based milk and drinks category includes plant-based plain milk, barista milk, flavoured milk and iced coffee drinks. It excludes plant-based kefir, milkshakes, meal replacement drinks and conventional coconut milk (the cooking ingredient). The market size is larger than in the previous report because the item list was refined, resulting in additional plant-based products being included in this year's category definition.

Branded versus private label

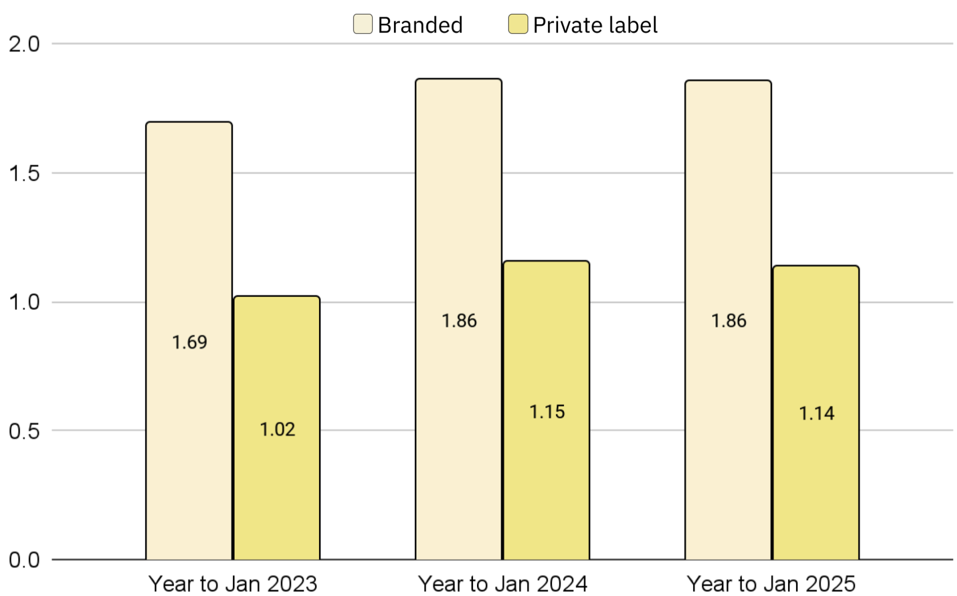
Both branded and private-label products have fallen in sales volume, and their relative market shares have remained roughly steady over time.

The price gap has also remained roughly steady over time, with private-label products being on average 39% cheaper per litre than branded products.

UK plant-based milk and drinks sales by branded or private label, year to January 2023-year to January 2025 (% of sales volume)



Average price per litre of plant-based milk and drinks in the UK, by branded or private label, year to January 2023-year to January 2025 (£/l)



Product format breakdown

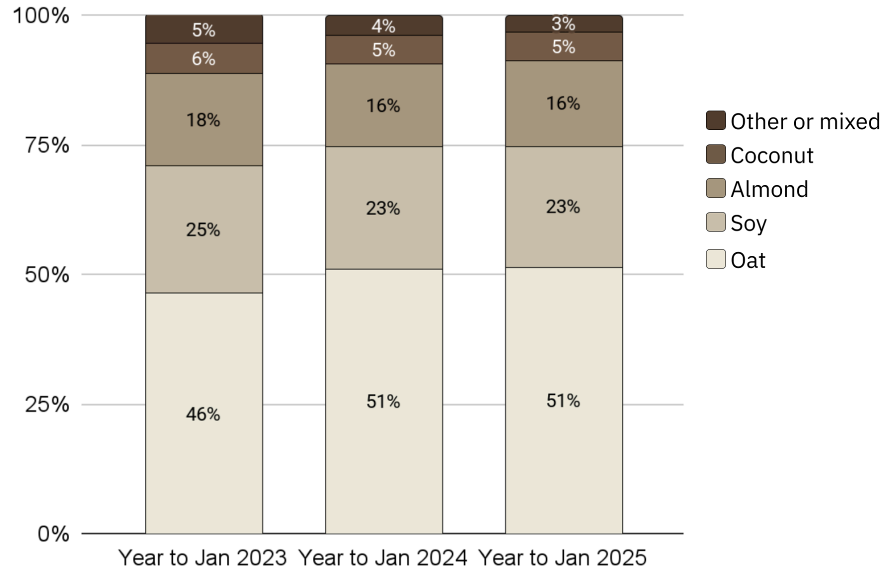
Oat-based milk and drinks have grown in market share, accounting for over half of sales volume in the year to January 2025. Soy and almond follow, at 23% and 16% respectively.

The absolute sales volume of oat-based milk and drinks has remained roughly level at around 123 million litres per year.

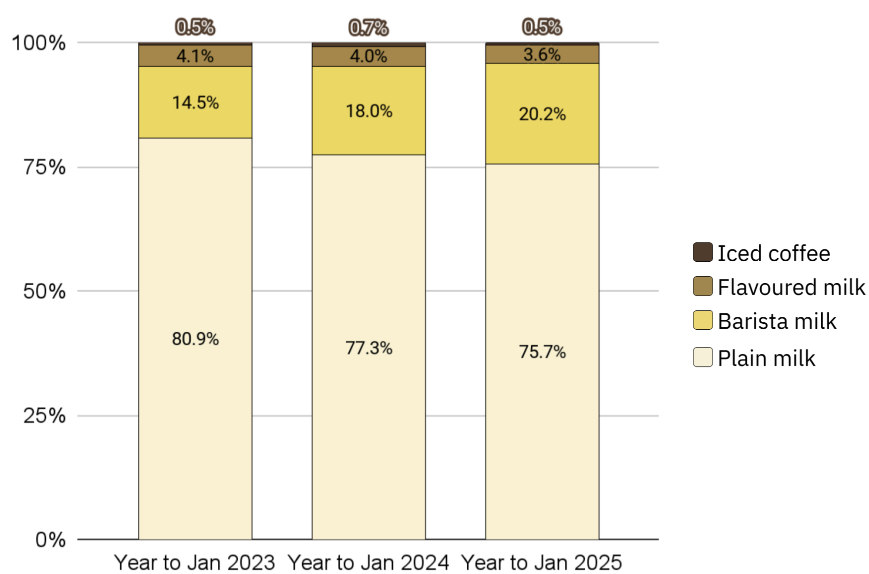
Plain milk accounted for three-quarters of sales volume in the year to January 2025, down from 80.9% two years previously.

Barista milk stands out as a segment experiencing growth in both market share and absolute sales volume, up from 39 million litres in the year to January 2023 to 48 million litres two years later – a rise of 25%. Barista milk is designed to be able to froth and be mixed into hot drinks without curdling, addressing some of the pain points that consumers may experience with some other types of plant-based milk. The success of this versatile segment shows the importance of making it easier for consumers to use plant-based products in the same way they would use animal-based equivalents.

UK plant-based milk and drinks sales by base ingredient, year to January 2023-year to January 2025 (% of sales volume)



UK plant-based milk and drinks sales by type, year to January 2023-year to January 2025 (% of sales volume)

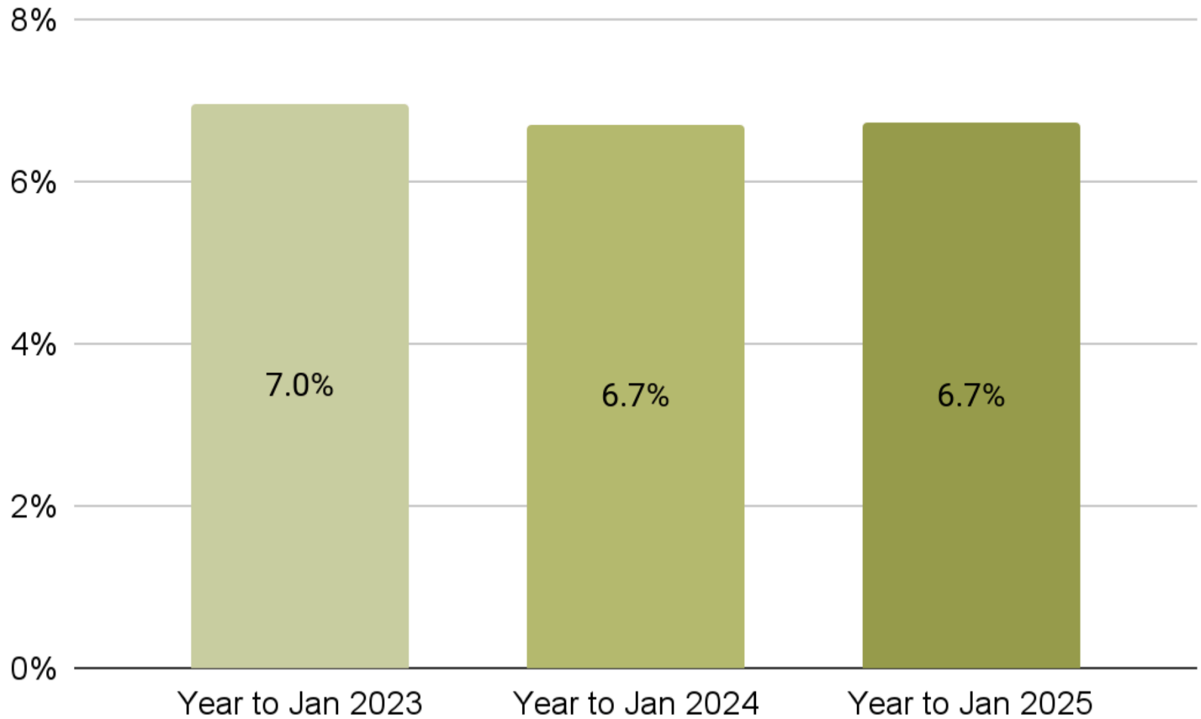


Market share

The market share of plant-based milk and drinks, as a proportion of total plant- and animal-based milk and dairy drinks sales volume,[5] remained level at 6.7% in the year to January 2025 following a dip from 7.0% in the year to January 2023.

The sales volume of animal-based milk and dairy drinks fell by 7% over the three-year time period, compared with 10% for plant-based milk and drinks.

Plant-based milk and drinks: share of the UK's total (plant- and animal-based) milk and dairy drinks market, year to January 2023-year to January 2025 (% of sales volume)



[5] The animal-based component of this calculation is comparable to the plant-based segment in that it includes milk, flavoured milk drinks and iced coffee drinks. It excludes kefir, milkshakes and meal replacement drinks.

Price trends relative to animal equivalent

Plant-based milk and drinks are around two-thirds more expensive per litre than animal-based milk and dairy drinks. That gap rose slightly over the three-year period.

However, the price gap is caused in large part by the different proportions of branded versus private-label products.

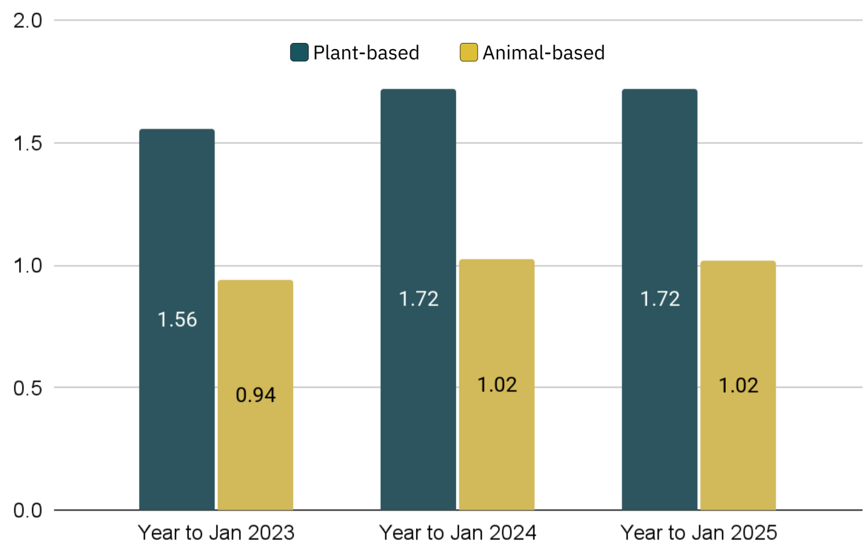
Private-label plant-based milk and drinks were only 36% more expensive than private-label animal-based milk and dairy drinks in the year to January 2025.

In contrast, branded plant-based milk and drinks were just 16% more expensive than branded animal-based milk and dairy drinks for the same timeframe.

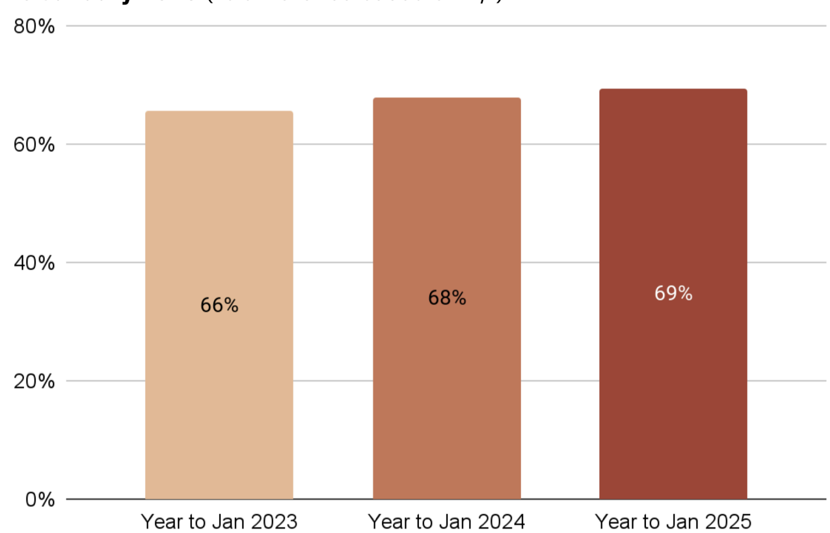
The plant-based milk and drinks market consists of 81% branded products (by sales volume), while the animal-based milk and drinks market consists of only 24% branded products and is dominated by private label products instead.

The overall price premium of plant-based milk and drinks can be attributed largely to this difference in the prevalence of branded products.

Average price per litre for plant-based and animal-based milk and dairy drinks in the UK, year to January 2023-year to January 2025 (£/l)



Price difference for plant-based milk and drinks compared to animal-based milk and dairy drinks in the UK, year to January 2023-year to January 2025 (% difference based on £/l)



Household panel data

Household panel data from NIQ Homescan shows a different trend to the Circana data: the proportion of households in the UK that bought plant-based milk at least once per year rose from 30.5% in 2022 to 31.8% in 2024. The proportion of frequent purchasers (who bought an average of once per month) rose slightly, from 10.0% in 2022 to 10.8% in 2024.

The difference in trends can likely be attributed to several causes.

First, NIQ covers sales in discounter stores whereas Circana does not. The NIQ data shows strong growth in the sales value of plant-based milk in discounter stores – up by 45% in value between 2022 and 2024, compared with just 11% growth for plant-based milk in other supermarkets (which is nevertheless a higher rate of growth than seen in the Circana data).

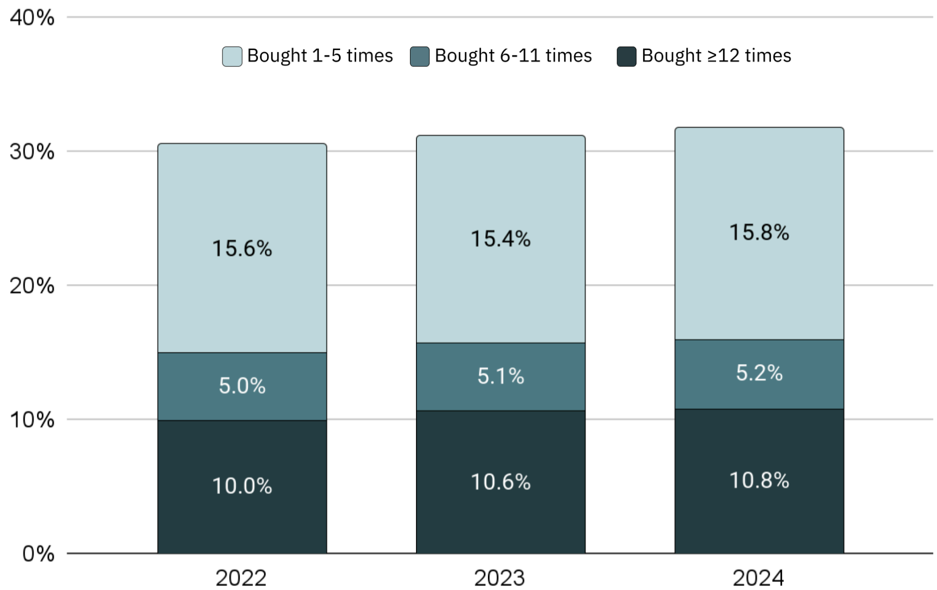
The NIQ data shows that there was a steep increase in the proportion of plant-based milk sales value that came from discounter stores from 17.6% in 2022 to 22.7% in 2023, followed by a slight fall to 21.6% in 2024. The initial jump coincided with a period of high inflation and a cost-of-living crisis in the UK, which likely drove shoppers towards cheaper options.

Since the Circana data does not cover discounter stores, and discounter stores account for a large proportion of the market, the true market size for plant-based milk and drinks is likely to be larger than shown in the “total market” section above.

Second, NIQ’s definition of the plant-based milk category does not align exactly with that used to analyse the Circana data, which means that the two datasets are not tracking exactly the same products.

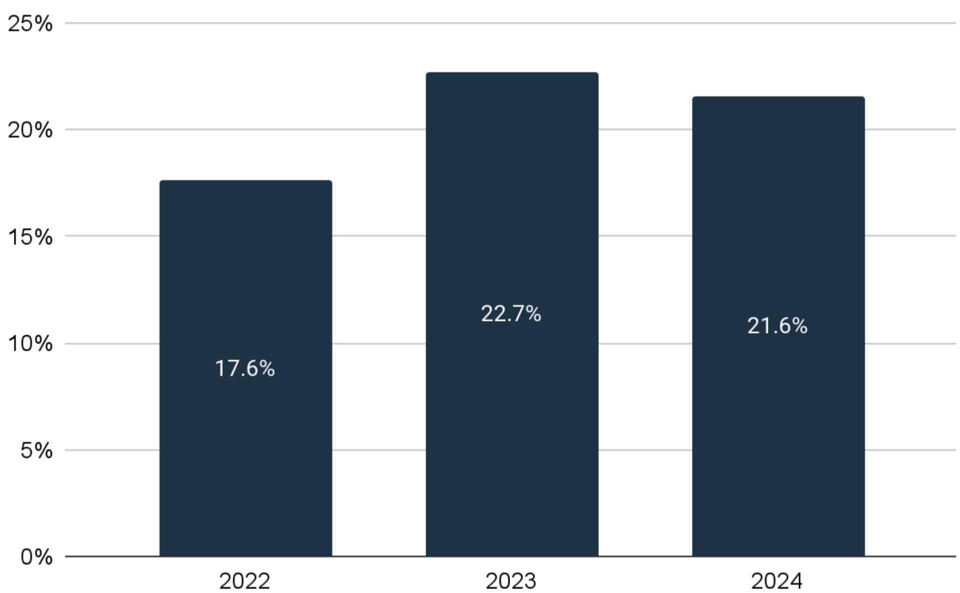
However, it is possible that the number of purchases made by frequent purchasers could have fallen, which could make the household panel data consistent with the falling unit sales seen in the Circana dataset.

Annual household purchase patterns for plant-based milk in the UK, 2022-2024 (% of households)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in the UK. The data covers 'Take Home' shopping and comes from a sample of 30,000 households. Data covers "plant-based milk".

Household purchase patterns for plant-based milk in the UK: proportion of sales value from discounter stores, 2022-2024 (%)



Data source: NIQ Homescan Consumer Panel. Data is nationally representative of the household population in the UK. The data covers 'Take Home' shopping and comes from a sample of 30,000 households. Data covers "plant-based milk".

Plant-based cheese

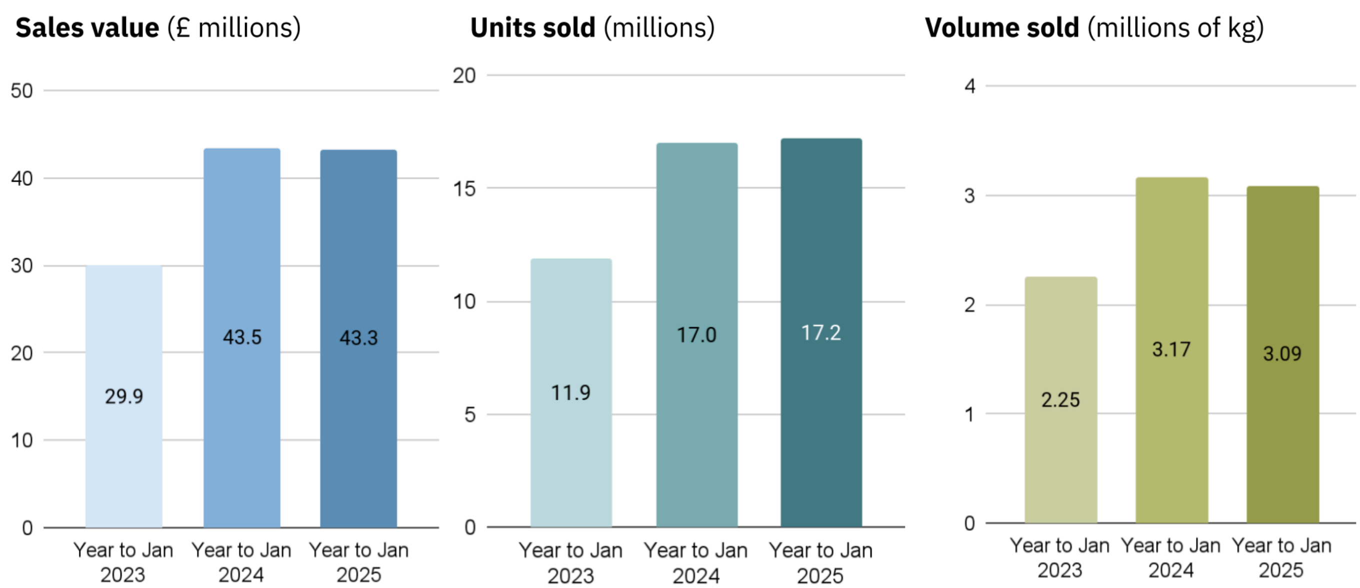
Total market

Sales of branded[6] plant-based cheese in the UK have plateaued after a period of significant growth.

Annual sales value in the year to January 2025 was £43.3 million, representing a one-year fall of 0.4% and a two-year rise of 44.6%. Unit sales reached 17.2 million in the year to January 2025, up by 1.2% on the previous year and up by 44.5% compared to the year to January 2023. Sales volume was 3.09 million kg in the year to January 2025, which was 2.6% lower than the previous year and 37.4% higher than two years prior.

The simultaneous fall in sales volume and rise in unit sales suggests that the average weight of a package has fallen, possibly linked to the rising market share of snacking formats (which tend to be relatively small packets).

Plant-based cheese sales in the UK, year to January 2023-year to January 2025



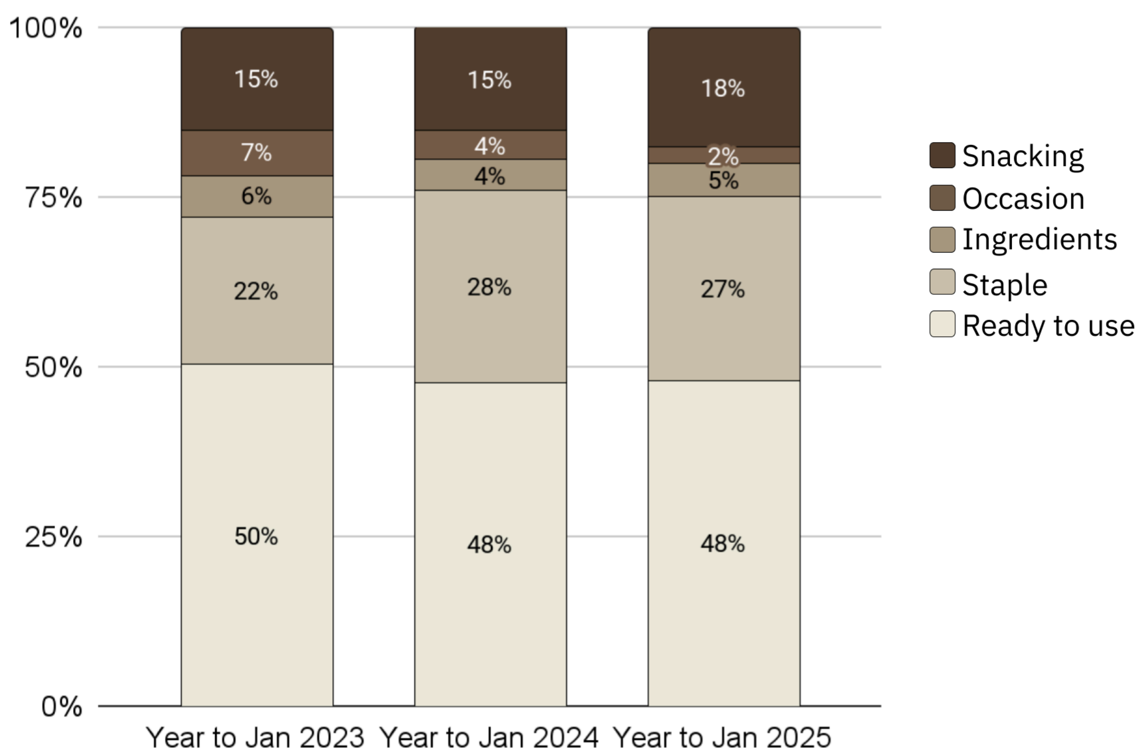
[6] The dataset covered only branded products (both plant-based and animal-based cheese), but some private-label plant-based products are now available in the UK. The cheese dataset is more extensive than that published in our previous edition of this report.

Product format breakdown

The best-selling type of plant-based cheese in the year to January 2025 was the ready-to-use segment, which consists largely of grated or sliced formats and represented 48% of sales volume. The “staple” segment (mostly blocks) followed at 27%. Snacking (mostly cream cheese or small pieces) accounted for 18%, up from 15% in the year ending January 2023.

The “ingredients” segment, at 5%, includes alternatives to cheeses usually used in cooked dishes, such as mozzarella, ricotta and hard Italian cheeses. The “occasion” segment, at 2%, consists mostly of plant-based cheeses with added ingredients such as garlic, herbs or jalapeño, as well as plant-based blue cheese.

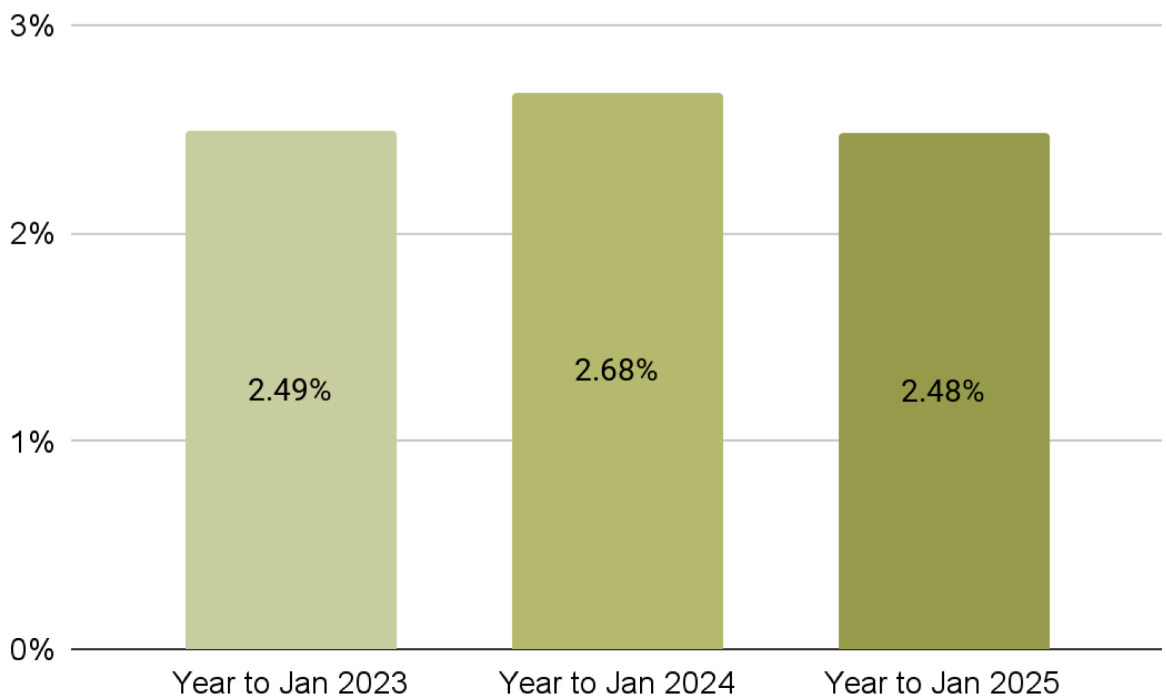
UK plant-based cheese sales by type, year to January 2023-year to January 2025 (% of sales volume)



Market share

The market share of plant-based cheese, as a percentage of the sales volume of both plant- and animal-based branded cheese, peaked at 2.68% in the year to January 2024 before falling to 2.48% in the year to January 2025. This fall is partly due to a rise in sales of branded animal-based cheese over the three-year period, and partly due to a slight fall in plant-based sales volume.

Plant-based cheese: share of the UK's total (plant- and animal-based) branded cheese market, year to January 2023-year to January 2025
(% of sales volume)



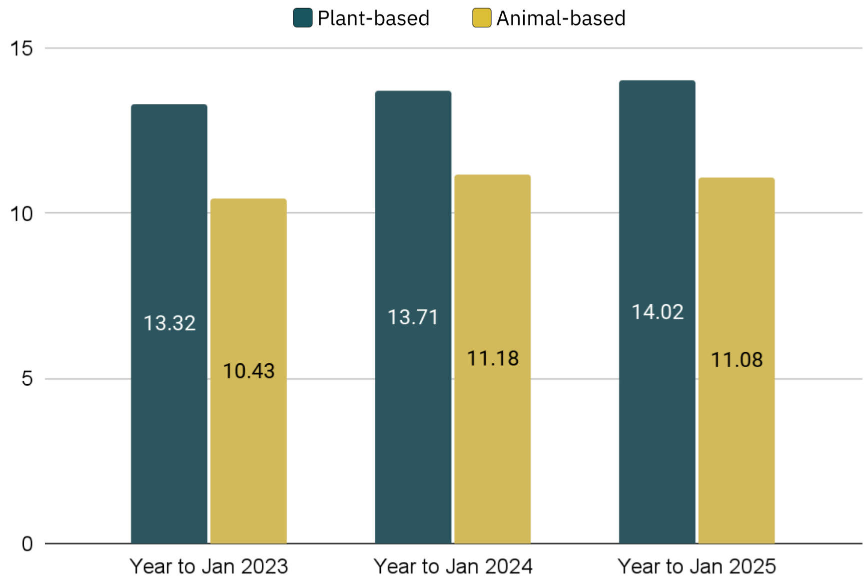
Price trends relative to animal equivalent

Branded plant-based cheese was 28% more expensive per kg than branded animal-based cheese in the year to January 2023.

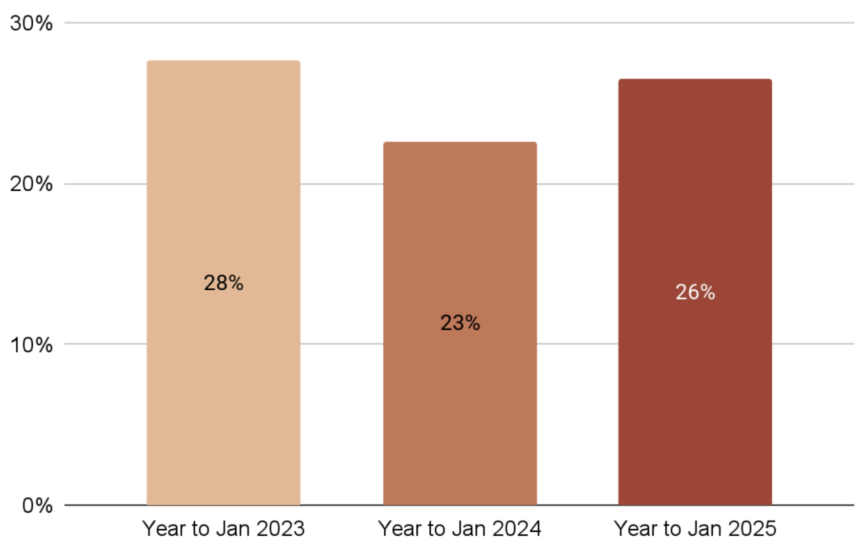
The price of animal-based cheese rose more than that of plant-based cheese in the following year, leading to a dip in the price gap to 23%.

However, in the year to January 2025, the price of plant-based cheese rose while that of animal-based cheese fell, leading to a slight increase in the price gap to 26%.

Average price per kg for plant-based and animal-based cheese in the UK, branded products only, year to January 2023-year to January 2025 (£/kg)



Price difference for plant-based cheese compared to animal-based cheese in the UK, branded products only, year to January 2023-year to January 2025 (% difference based on £/kg)



Plant-based yoghurt

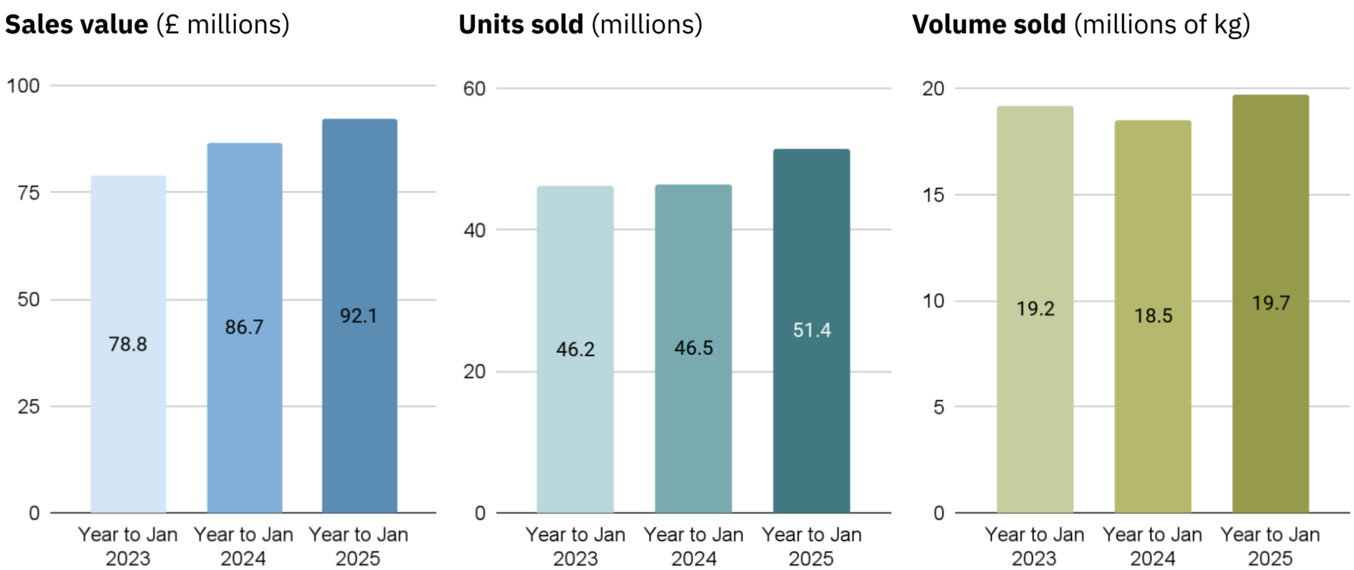
Total market

The sales volume of plant-based yoghurt has rebounded in the UK.

Sales volume dipped in the year to January 2024, but rose by 6.5% to reach 19.7 million kg in the year to January 2025, surpassing the sales volume of two years earlier.

Annual sales value was £92.1 million in the year to January 2025, a one-year increase of 6.3% and a two-year increase of 16.9%. Unit sales were 51.4 million in the year to January 2025, up by 10.6% on the previous year and 11.5% on two years earlier.

Plant-based yoghurt sales in the UK, year to January 2023-year to January 2025



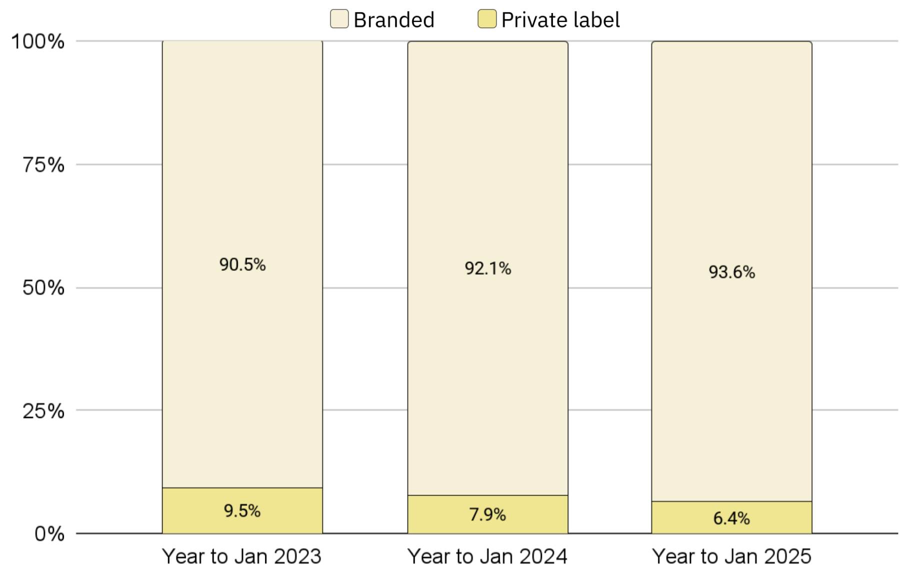
Branded versus private label

The market share of private-label products fell from 9.5% to 6.4% over the three-year period, despite a widening price gap between branded and private-label items.

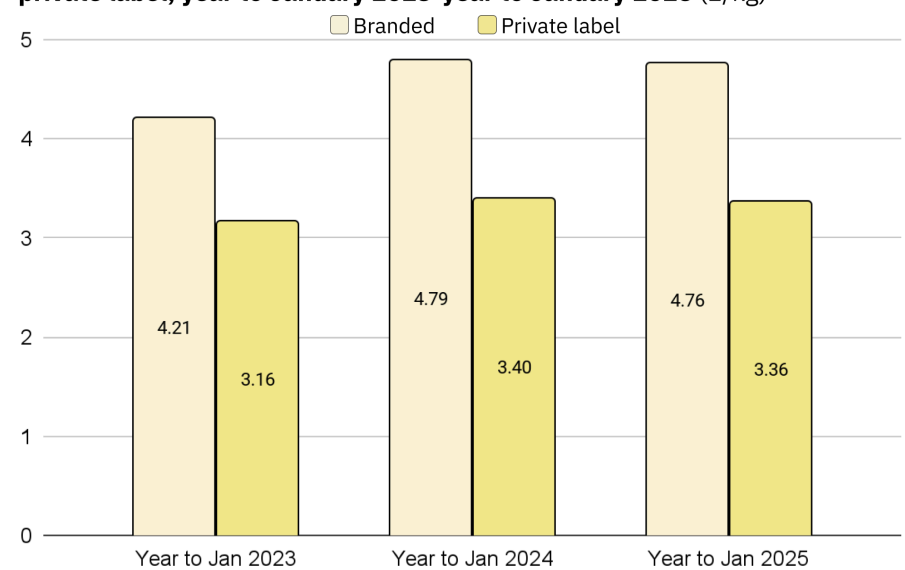
In the year to January 2025, branded products were 29% more expensive per kg than private-label options.

These trends suggest that consumers are being driven by factors other than price, such as taste, texture or perceived quality.

UK plant-based yoghurt sales by branded or private label, year to January 2023-year to January 2025 (% of sales volume)



Average price per kg of plant-based yoghurt in the UK, by branded or private label, year to January 2023-year to January 2025 (£/kg)

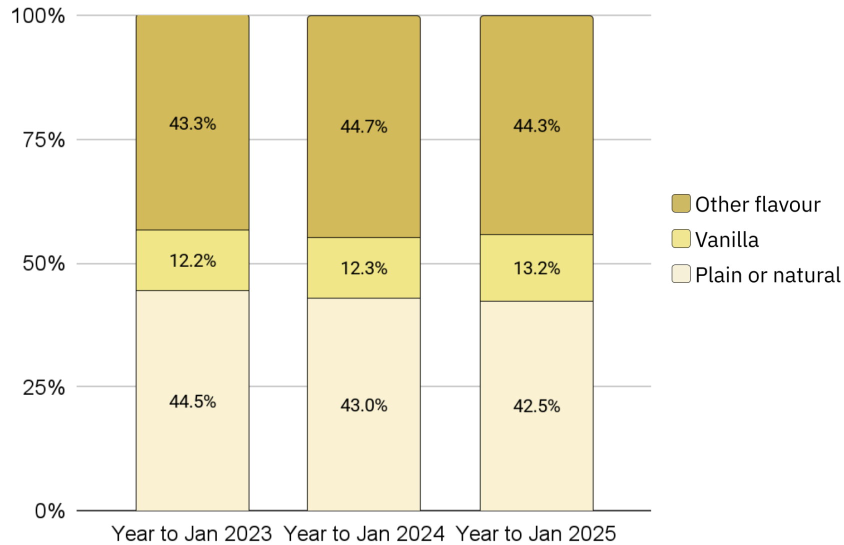


Product format breakdown

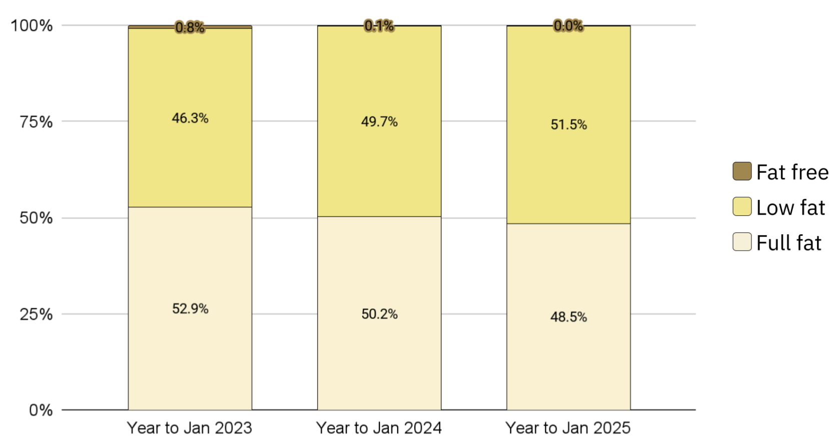
There has been a slight shift away from plain or natural yoghurts towards flavoured yoghurts, with some growth in vanilla-flavoured yoghurts.

Both full-fat and low-fat yoghurts saw sales volume growth in the year to January 2025. Low-fat gained more market share, mainly from higher sales of existing products rather than due to new product launches. This possibly indicates rising interest in health and nutrition among consumers.

UK plant-based yoghurt sales by flavour, year to January 2023-year to January 2025 (% of sales volume)



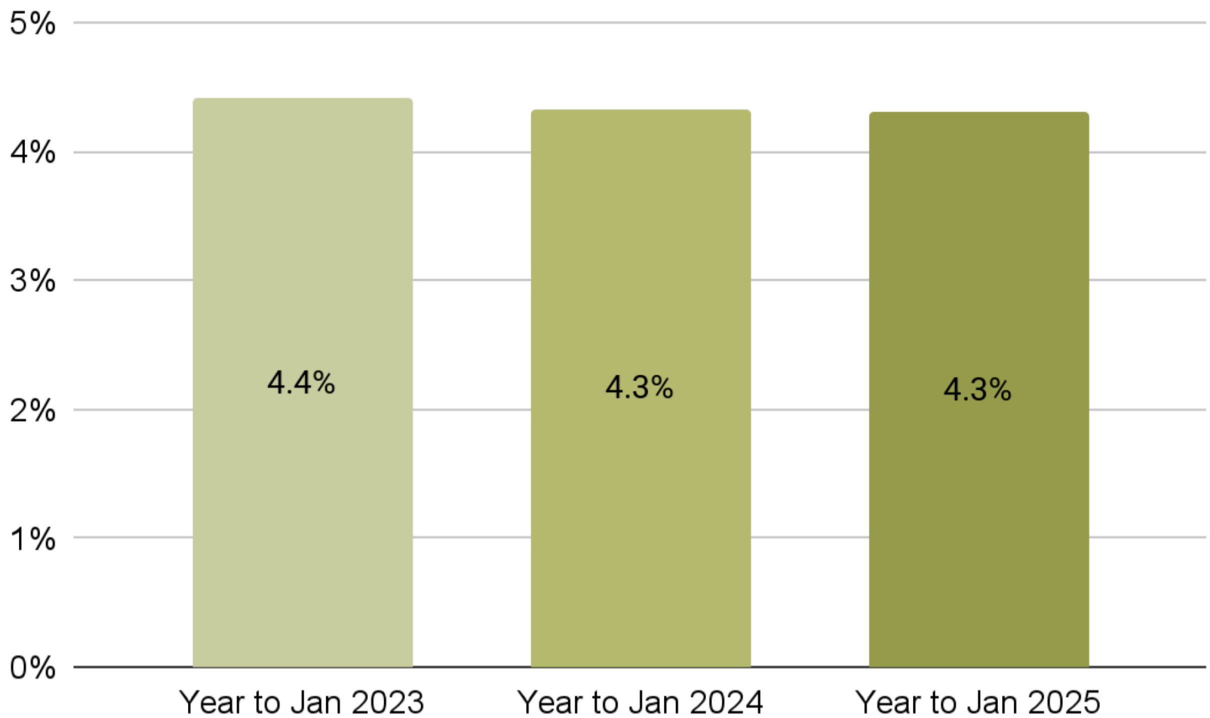
UK plant-based yoghurt sales by fat content, year to January 2023-year to January 2025 (% of sales volume)



Market share

The market share of plant-based yoghurt, as a percentage of total plant- and animal-based yoghurt sales volume, has remained roughly steady at around 4.3%, as the sales volume of animal-based yoghurt has also dipped and rebounded.

Plant-based yoghurt: share of the UK's total (plant- and animal-based) yoghurt market, year to January 2023-year to January 2025
(% of sales volume)



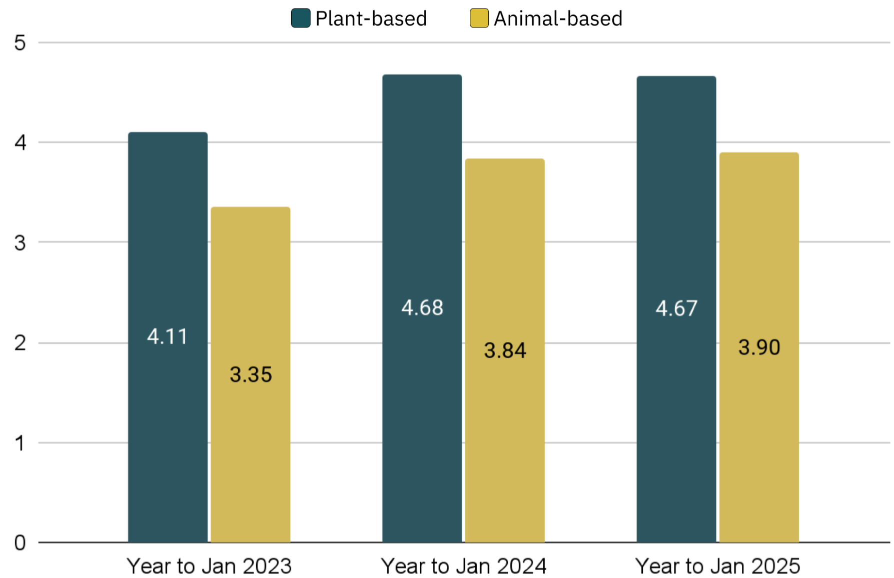
Price trends relative to animal equivalent

Plant-based yoghurt is more expensive than animal-based yoghurt per kg, but the price gap fell from 22% to 20% in the year to January 2025, driven by a slight increase in the price of animal-based yoghurt.

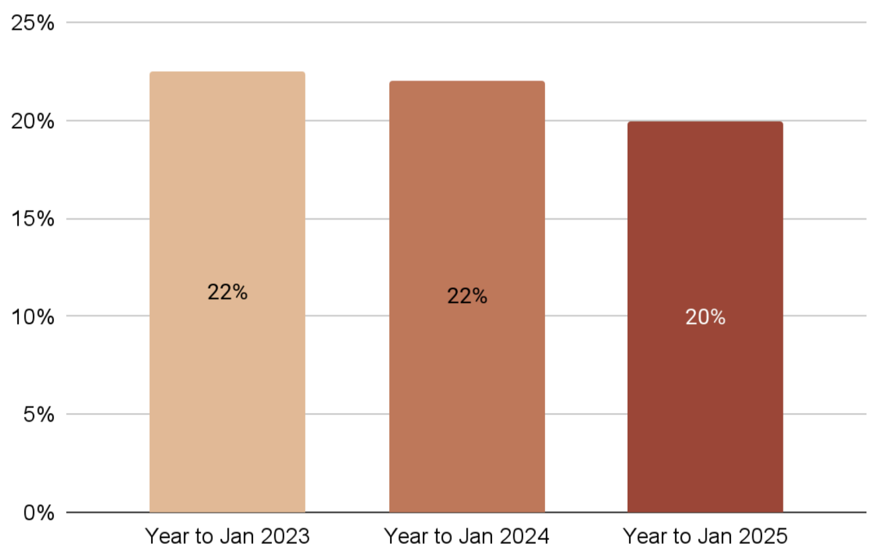
Both types of yoghurt became more expensive in 2023 during the period of high inflation in the UK's food sector.

Comparing only branded products, the price premium of plant-based yoghurt was just 6% in the year to January 2025. In contrast, the price premium when comparing private-label products was 34%.

Average price per kg for plant-based and animal-based yoghurt in the UK, year to January 2023-year to January 2025 (£/kg)



Price difference for plant-based yoghurt compared to animal-based yoghurt in the UK, year to January 2023-year to January 2025
(% difference based on £/kg)



Plant-based chilled cream

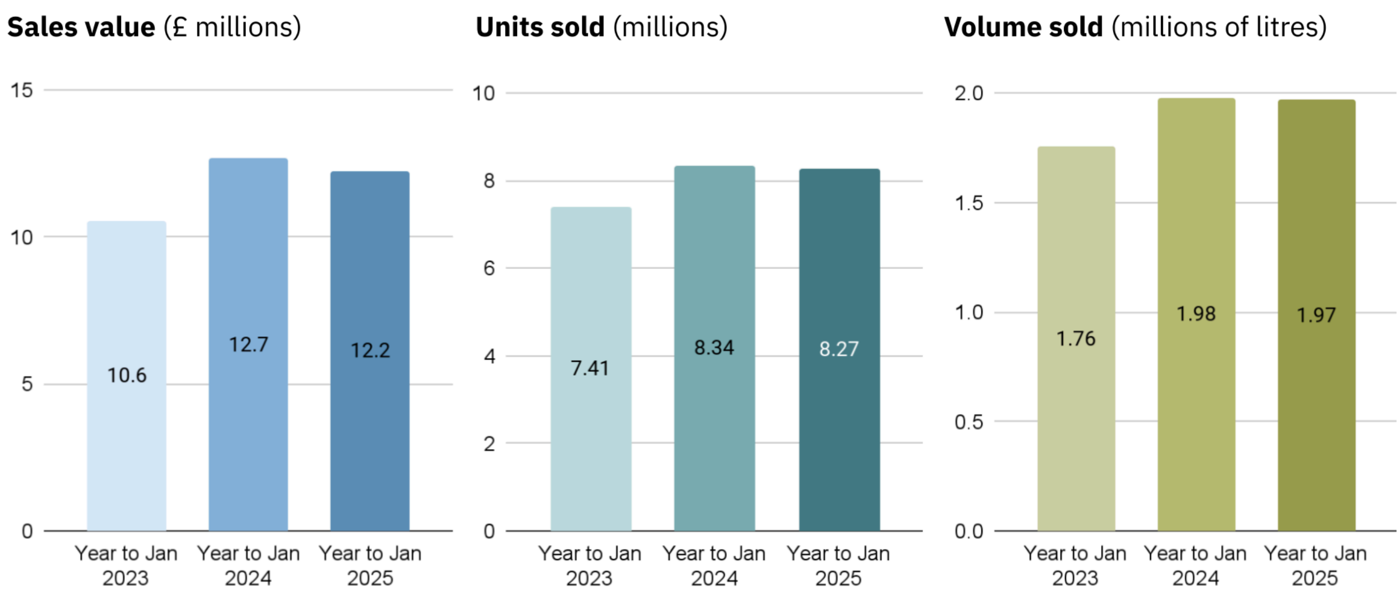
Total market

The sales volume of plant-based cream in the UK has levelled out following a period of growth. Note that the data available from Circana does not cover any ambient cream products.

Annual sales value peaked in the year to January 2024, having risen by 19.9%, before falling by 3.3% in the year to January 2025. Similarly, unit sales rose by 12.6% in the year to January 2024, and then remained level at around 8.3 million. Sales volume was 1.97 million litres in the year to January 2025 – roughly level with the previous year and up by 12.2% on two years previously.

The slight fall in sales value, coupled with steady sales volume, shows that average prices fell slightly in the year to January 2025.

Plant-based chilled cream sales in the UK, year to January 2023-year to January 2025

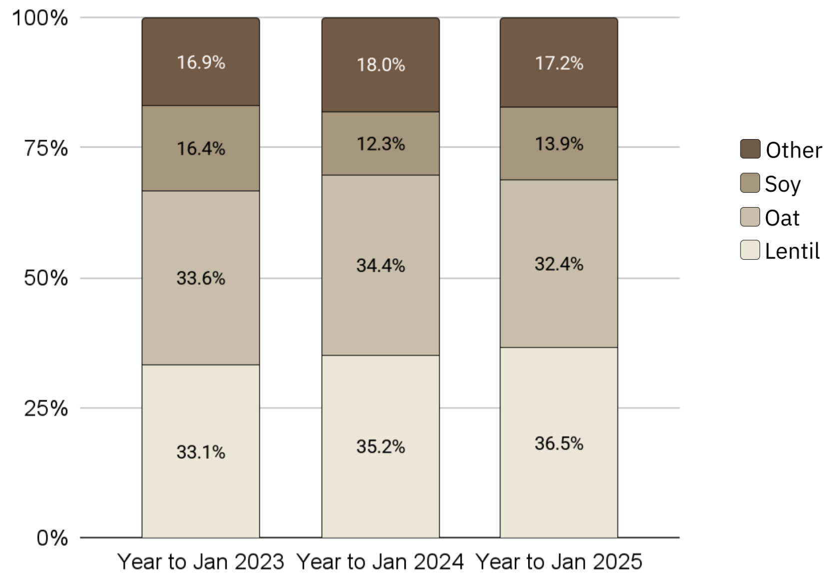


Product format breakdown

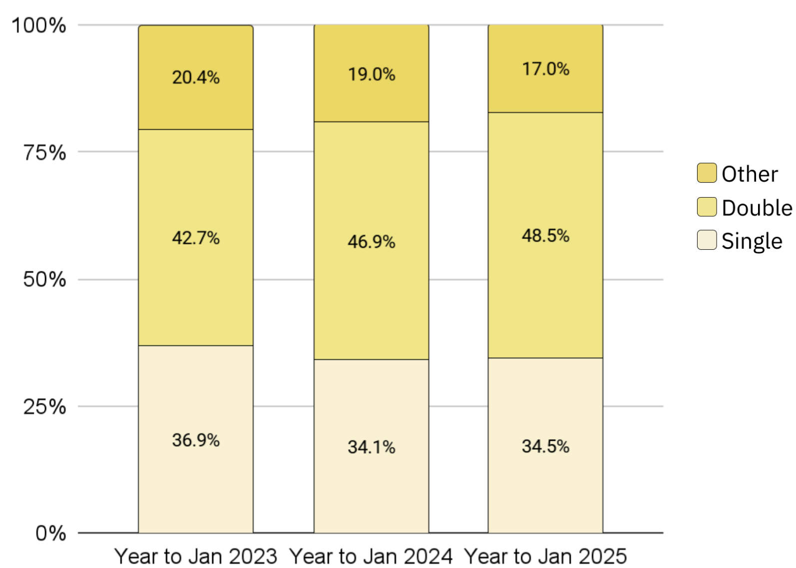
Plant-based cream made from lentils gained market share over the three-year period. Soy-based cream lost market share despite being the most affordable option (an average of £4.93/l in the year to January 2025). Lentil-based cream is the second-cheapest, at £5.49/l in the same period.

Plant-based double cream gained market share, accounting for nearly half of sales volume in the year to January 2025, while the market shares of single cream and "other" types (including spray cream and crème fraîche) fell.

UK plant-based chilled cream sales by ingredient base, year to January 2023-year to January 2025 (% of sales volume)



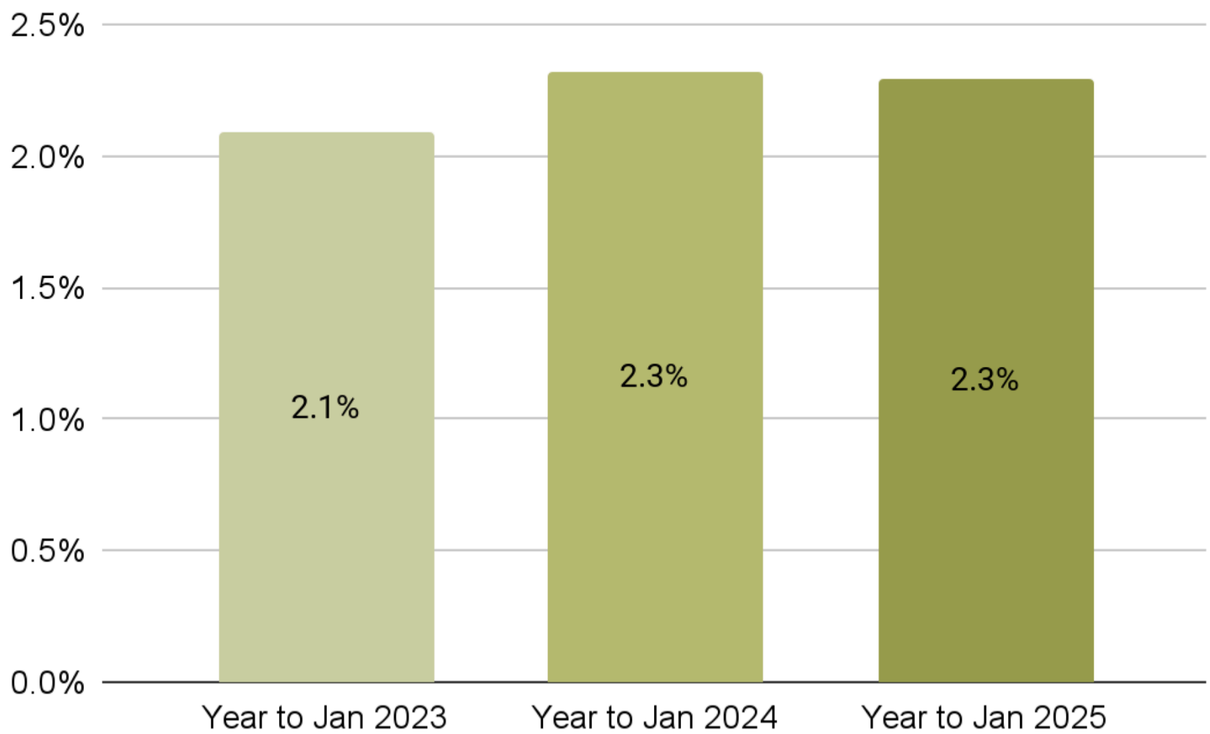
UK plant-based chilled cream sales by type, year to January 2023-year to January 2025 (% of sales volume)



Market share

The market share of plant-based cream, as a percentage of the overall sales volume of plant- and animal-based chilled cream, rose slightly from 2.1% in the year to January 2023 to 2.3% in the year to January 2025. This reflects the increased sales volume of plant-based cream, while sales volume of animal-based cream remained roughly steady over the three-year period.

Plant-based chilled cream: share of the UK's total (plant- and animal-based) chilled cream market, year to January 2023-year to January 2025 (% of sales volume)



Price trends relative to animal equivalent

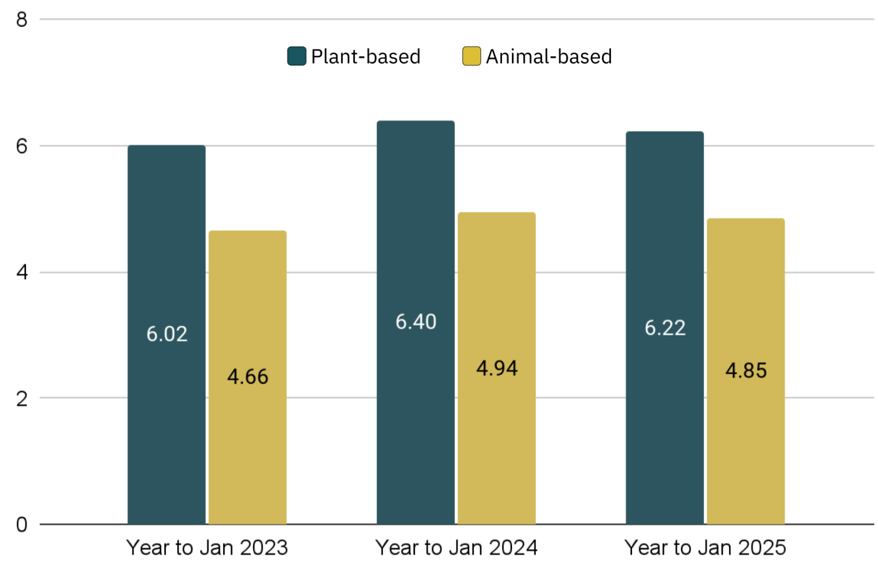
Plant-based cream is more expensive per litre, on average, than the animal-based equivalent, with a price gap of 28% in the year to January 2025.

However, some segments are cost-competitive with animal-based cream.

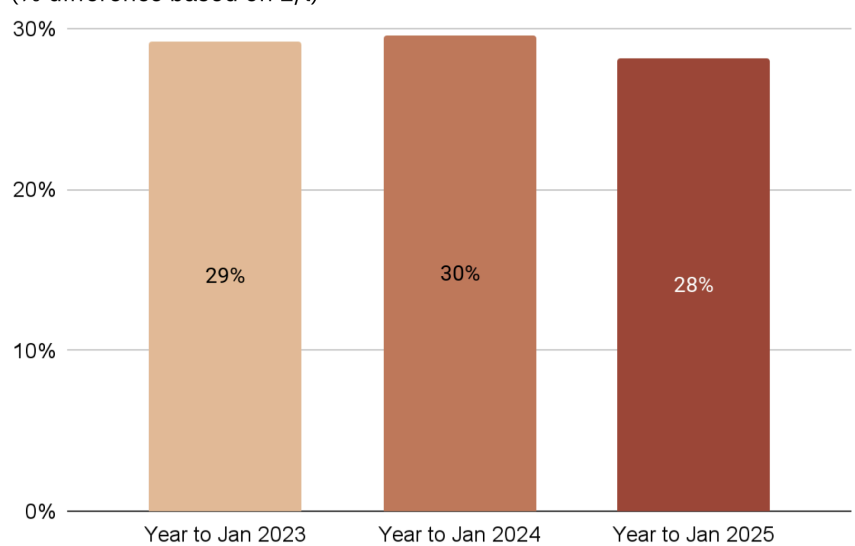
All of the plant-based cream items in this dataset are branded, indicating that retailers have not yet entered this space with their own products. When plant-based cream is compared to only branded animal-based cream, the prices are almost the same, with plant-based being just 1.6% more expensive than branded animal-based cream in the most recent time period.

Furthermore, plant-based single and double cream products are significantly cheaper than the "other" segment (which includes spray cream and crème fraîche).

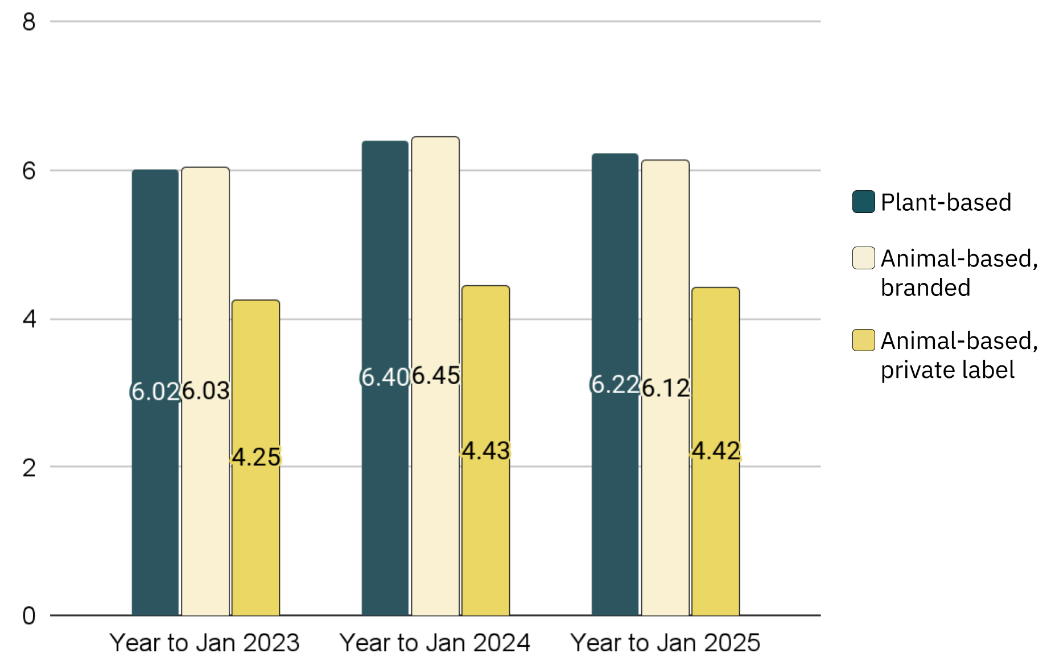
Average price per litre for plant-based and animal-based chilled cream in the UK, year to January 2023-year to January 2025 (£/l)



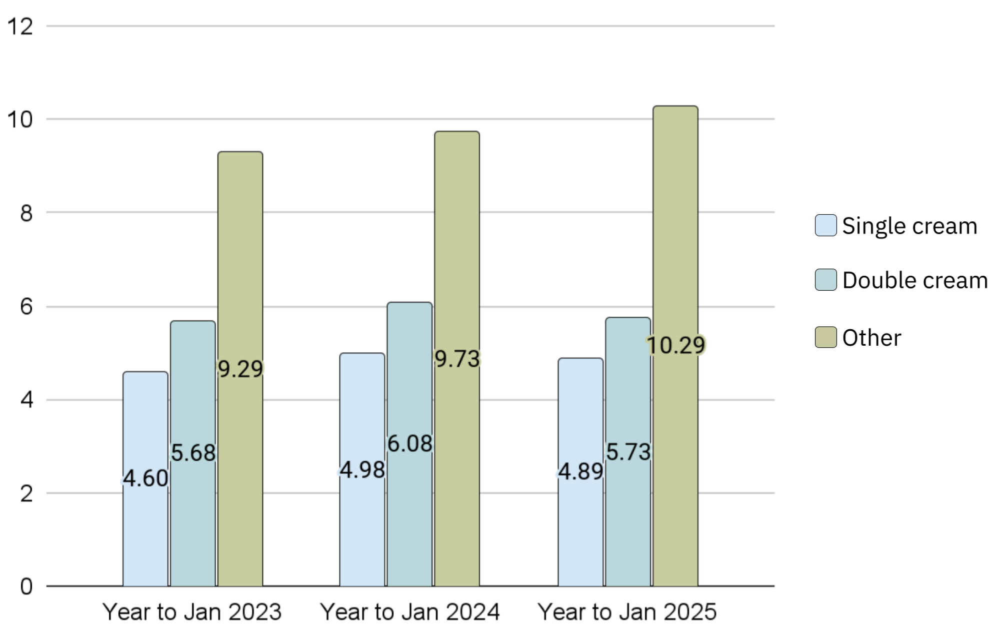
Price difference for plant-based chilled cream compared to animal-based chilled cream in the UK, year to January 2023-year to January 2025
(% difference based on £/l)



Average price per litre for plant-based and animal-based chilled cream in the UK, year to January 2023-year to January 2025 (£/l)



Average price per litre for plant-based chilled cream by type in the UK, year to January 2023-year to January 2025 (£/l)



Closing remarks

The UK's plant-based sector has experienced a challenging few years, with falling sales, negative media coverage and the cost-of-living crisis putting pressure on consumers' budgets. However, our data shows that the rate of decline in the sales volume of plant-based foods has slowed.

There are also encouraging signs of resilience and even growth in some segments, with the proportion of households buying plant-based milk still rising, demand for plant-based yoghurt and seafood rebounding, and plant-based cream being cost-competitive with branded animal-based cream.

Recent GFI Europe research shows that, while over 38% UK consumers want to eat more plant-based foods, there are large gaps between the performance of plant- and animal-based foods on factors such as availability in supermarkets, taste and value for money. The fact that overall retail sales of plant-based foods have fallen despite the widespread desire to eat more of them suggests that the plant-based industry needs to continue investing in cheaper, tastier products that consumers find easy to prepare.

Helen Breewood,
Senior Market and Consumer Insights Manager at the Good Food Institute Europe

Plant-based foods remain the most promising way to accelerate the transition to more sustainable and healthy eating in the UK. With a new national food strategy on the horizon, the government has a golden opportunity to support the plant-based sector to continue to rebound. Through public investment in innovation and regulatory reforms, policymakers can unlock growth and enable more consumers to access nutritious plant-based foods without sacrificing taste and familiarity.

Linus Pardoe,
Senior UK Policy Manager at the Good Food Institute Europe

About the Good Food Institute Europe

The Good Food Institute Europe is a nonprofit and think tank helping to build a more sustainable, secure and just food system by diversifying protein production.

We champion the science, policies and investment needed to make alternative proteins delicious, affordable and accessible across Europe.

By advancing plant-based foods, cultivating meat from cells and producing ingredients through fermentation, we can boost food security, meet our climate targets and support nature-friendly farming. GFI Europe is powered by philanthropy.

Contact

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Appendix: Calendar year sales data

The table below presents calendar year sales data, based on 52-week periods ending in December each year (2023 and 2024). This allows comparisons to the calendar-year sales data in our [reports covering France, Germany, Italy, the Netherlands and Spain](#).

	Sales value		Unit sales		Sales volume	
	2024, £ million	2023-24 change	2024, million units	2023-24 change	2024, million kg*	2023-24 change
Meat	335.9	-9.7%	146.6	-11.1%	35.8	-11.7%
Seafood	6.2	21.0%	2.5	16.3%	0.5	2.2%
Milk and drinks	413.7	-2.3%	245.6	-2.8%	240.8	-2.6%
Cheese	43.6	0.4%	17.3	2.0%	3.1	-1.7%
Yoghurt	92.4	6.7%	51.5	10.5%	19.8	6.3%
Cream	12.3	-2.1%	8.4	2.8%	2.0	3.3%
Total	**904.0**	**-4.1%**	**472.0**	**-4.0%**	**302.0**	**-3.2%**

	Sales value		Unit sales		Sales volume	
	2024, £ million	2023-24 change	2024, million units	2023-24 change	2024, million kg*	2023-24 change
Branded	817	-3.2%	407	-3.0%	250	-2.1%
Private label	87	-12.1%	65	-9.7%	52	-8.3%