

2024 - 2025

UK plant-based food retail market insights

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

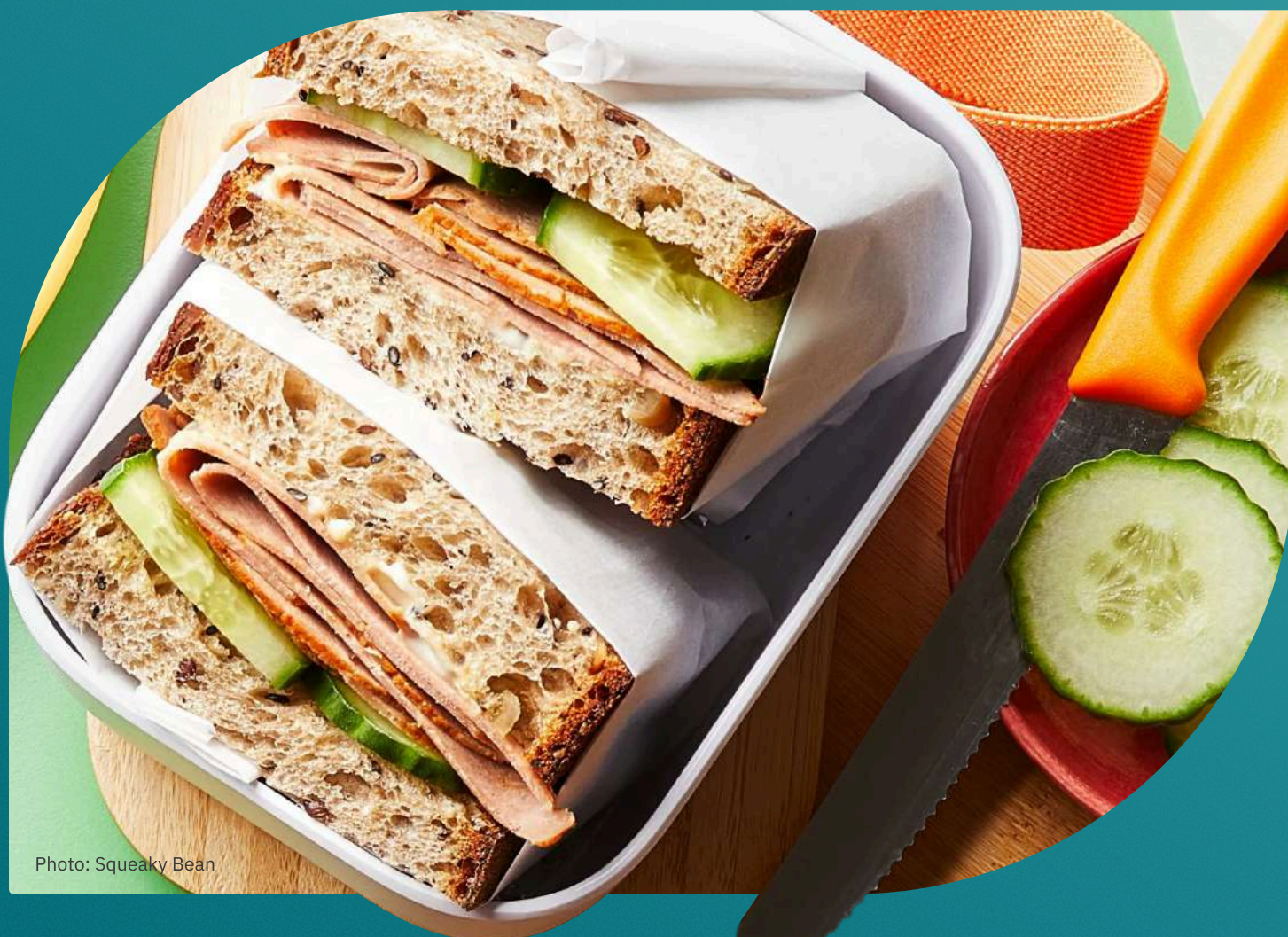


Photo: Squeaky Bean

Executive summary

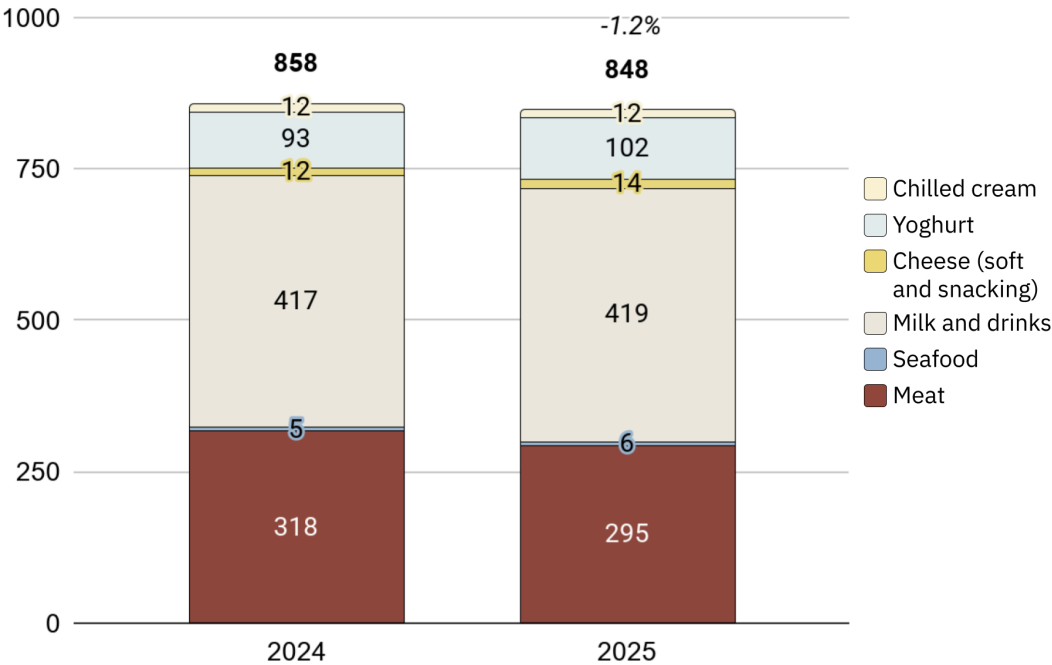
This report shows retail sales trends in six plant-based categories (meat, seafood, milk and drinks, cheese, yoghurt and chilled cream) in the UK during 2024 and 2025, based on data from Circana. It also uses NIQ Homescan data to investigate trends in household purchase patterns.

The UK retail market (excluding discounters) across six categories of plant-based food was valued at £848 million in 2025.	The combined sales volume of six plant-based categories in the UK fell by 2.5% in 2025.	31.2% of UK households bought plant-based meat at least once in 2025.	31.3% of UK households bought plant-based milk at least once in 2025.
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Sales of plant-based foods in UK retailers (excluding discounters such as Aldi and Lidl) contracted slightly in 2025, mostly driven by falling sales of plant-based meat.

The combined annual sales value across the six plant-based categories was £848 million (€993 million) in 2025, down by 1.2% from 2024. Unit sales fell by 2.9% to 439 million, and sales volume fell by 2.5% to 291 million kg.

Plant-based food sales value by category in UK supermarkets excluding discounters, 2024-2025 (£ millions)



Branded sales fell more slowly than those of private-label (supermarket own-brand) products despite their higher price point, possibly indicating that actual or perceived product performance is more important than affordability in some cases.

Branded plant-based sales volume fell 1.7% in 2025.	Private-label plant-based sales volume fell 6.5% in 2025.
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Performance varied across product categories.

The greatest rate of decline was in plant-based meat, the UK’s second-largest plant-based category by sales value. Sales volume fell by 9.4% between 2024 and 2025. It is likely that some demand for plant-based meat has shifted to discounter stores, as separate data from NIQ Homescan showed that the proportion of sales value from discounters rose between 2023 and 2025, so the sales figures presented here may overstate the contraction of the plant-based meat category. The fall in sales continues a downward trend seen [since 2022](#), despite widespread [intent](#) among UK consumers to eat more plants and less meat.

Plant-based milk and drinks remained a well-established category in the UK, with the largest sales value and the highest market share relative to animal-based products (of the categories for which a market share could be calculated). They had a relatively high price, costing 72% more per litre than dairy milk, in contrast to the narrower price gap in other mature markets such as Germany, where the price premium was just 10% in 2025. However, sales of more expensive branded products declined less than those of cheaper private-label products, and growth was seen in relatively expensive barista-style products (+10% in sales volume in 2025), which are designed to foam and perform well in hot drinks.

Plant-based milk and drinks in 2025			
£419 million annual sales value	6.9% of overall plant- and animal-based milk sales volume	2.2% year-on-year fall in sales volume	72% more expensive per litre than animal-based milk

Plant-based yoghurt had the third-largest sales value in 2025, and grew 4.7% in sales volume. It appears to have benefited from a wider rise in demand for yoghurt, including

dairy yoghurt, as its market share remained roughly steady at 4.3% of yoghurt sales volume in both 2024 and 2025.

Plant-based seafood, soft and snacking cheese, and chilled cream remained niche categories in 2025, with significantly lower sales value than the other categories.

This year's report features a new chapter on **tofu, tempeh and seitan**. These products are not classed as plant-based meat or counted towards the plant-based total because they are not marketed explicitly as analogues of specific animal-based products. Tofu, tempeh and seitan's combined sales volume rose 16.8% between 2024 and 2025, possibly driven by tofu's affordability, as well as consumer perceptions that it is less processed. Nevertheless, the sales volume of plant-based meat was 4.7 times higher than the combined sales volume of tofu, tempeh and seitan in 2025, showing that products offering a meat-like taste, texture or format remain more popular among UK consumers.

Overview of plant-based food sales in UK supermarkets excluding discounters, by category, 2024-2025

	Sales value		Unit sales		Sales volume	
	2025, £ million	2024-25 change	2025, million units	2024-25 change	2025, million kg	2024-25 change
Meat	294.6	-7.3%	125.9	-8.6%	30.5	-9.4%
Seafood	5.9	8.9%	2.3	8.5%	0.5	13.7%
Milk and drinks	419.3	0.5%	241.4	-2.2%	236.1	-2.2%
Cheese (soft and snacking)	14.0	12.6%	5.8	10.0%	0.9	10.1%
Yoghurt	102.3	10.0%	55.8	8.1%	20.8	4.7%
Cream	11.8	-4.7%	7.9	-6.7%	1.9	-6.8%
Total	847.8	-1.2%	439.1	-2.9%	290.6	-2.5%

Data on additional products that are not counted towards the plant-based total

Tofu, tempeh and seitan	52.1	14.6%	23.4	20.8%	6.5	16.8%
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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.

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 [19% of the UK's grocery retail market](#) in 2025.

This report does not include food service sales, such as from restaurants or fast-food outlets.

Sales value figures include taxes.

The Circana dataset covers a two-year time period, with the exact dates depending on product category:

- For meat, seafood and cream: the 52-week periods ending 28 December 2024 and 27 December 2025.
- For milk, cheese and yoghurt: the 52-week periods ending 22 December 2024 and 21 December 2025.

The report 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 who scan items that they bring home, to offer a complementary viewpoint to the Circana retail sales data.

The NIQ dataset covers a three-year time period:

- 2023 = 1 January 2023 to 30 December 2023.
- 2024 = 31 December 2023 to 28 December 2024.
- 2025 = 29 December 2024 to 27 December 2025.

Note that due to ongoing refinement and backdating of the datasets by both Circana and NIQ, the figures reported here are not directly comparable to those reported in the previous edition of this report.

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 mycoprotein 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

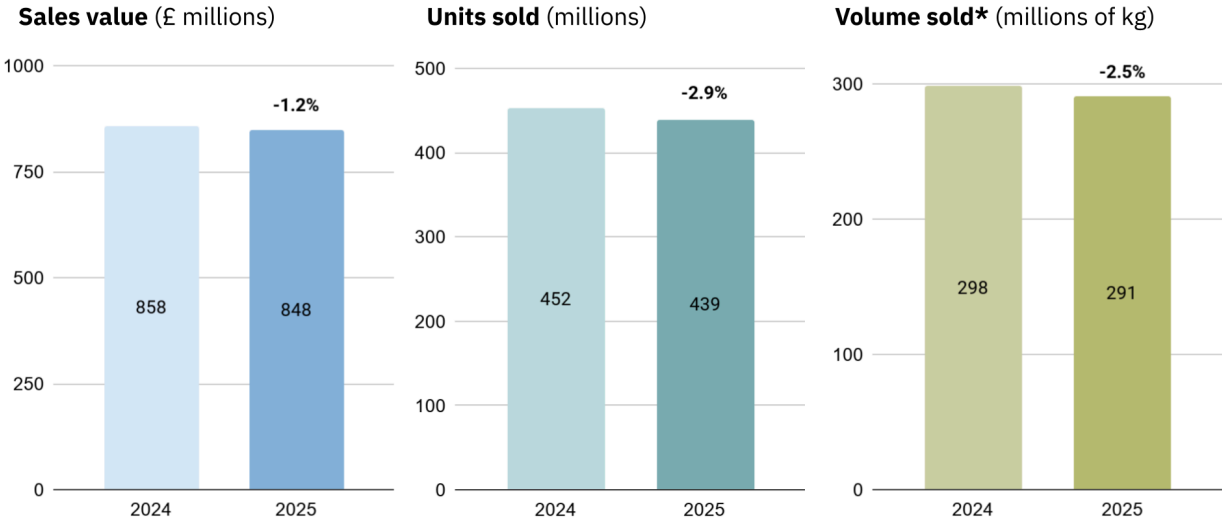
Total UK plant-based market

Sales of plant-based foods in UK supermarkets (excluding discounters) fell slightly in 2025, driven largely by falling plant-based meat sales.

Total annual sales value across six plant-based categories (meat, seafood, milk and drinks, cheese, yoghurt and chilled cream) remained roughly level in 2025, falling by 1.2% to £848 million. Unit sales fell by 2.9% to 439 million. Sales volume fell by 2.5% to 291 million kg.

This fall occurs in the context of a challenging few years for the UK’s food sector as a whole, with the Food & Drink Federation [reporting](#) that between 2020 and 2025, the total volume of food sold in UK supermarkets fell by 7%, while retail food prices rose 39% between January 2020 and March 2026.

Plant-based food sales across six categories in UK supermarkets excluding discounters, 2024-2025



*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 was the best-established plant-based category in the UK in 2025, with the largest sales value and the highest overall market share¹ (relative to sales of the animal-based equivalent).

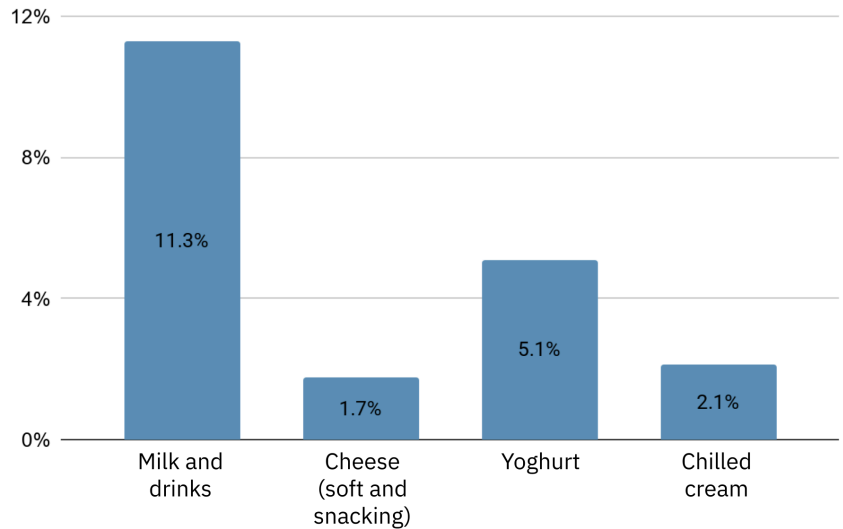
Plant-based options accounted for 11.3% of the sales value and 6.9% of the sales volume of overall milk and dairy drink retail sales in 2025. The greater share by value is due to the high price of plant-based milk and drinks compared with dairy milk.

Plant-based options represented 4.3% of overall yoghurt sales volume in 2025. They had a smaller market size than plant-based meat and milk and drinks, but a higher growth rate – up by 10% in sales value in 2025.

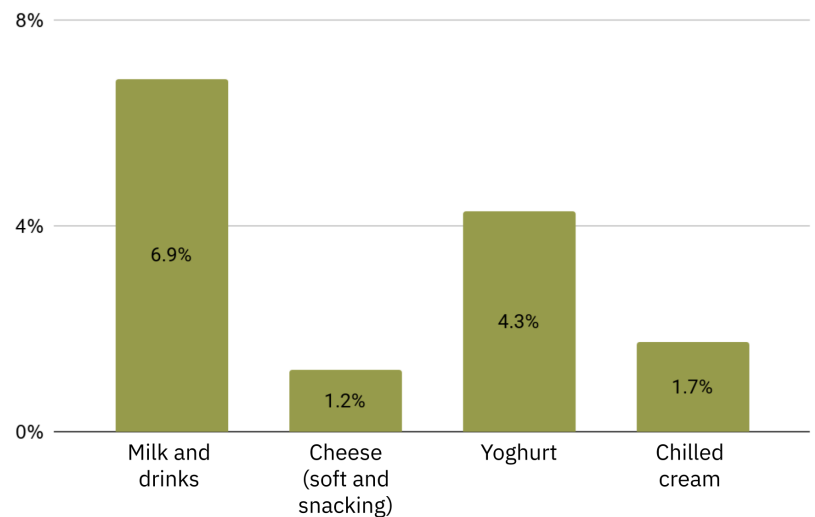
Plant-based seafood, cheese and cream remained niche categories in 2025, with smaller market sizes than the other three categories.

Most of the decline in absolute unit sales was driven by plant-based meat (down 11.85 million units between 2024 and 2025), followed by plant-based milk and drinks (down 5.45 million). Plant-based yoghurt saw the largest rise in unit sales, up 4.17 million.

Plant-based food: share of total pre-packaged (plant- and animal-based) sales in UK supermarkets excluding discounters, by category, 2025 (% of sales value)

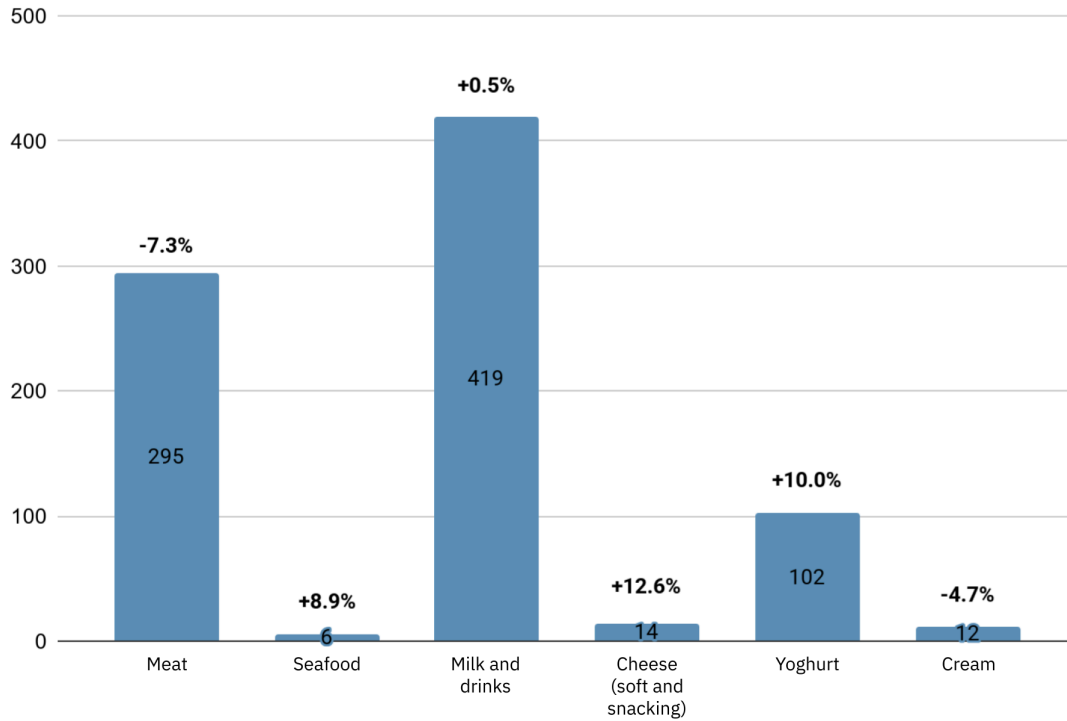


Plant-based food: share of total pre-packaged (plant- and animal-based) sales in UK supermarkets excluding discounters, by category, 2025 (% of sales volume)



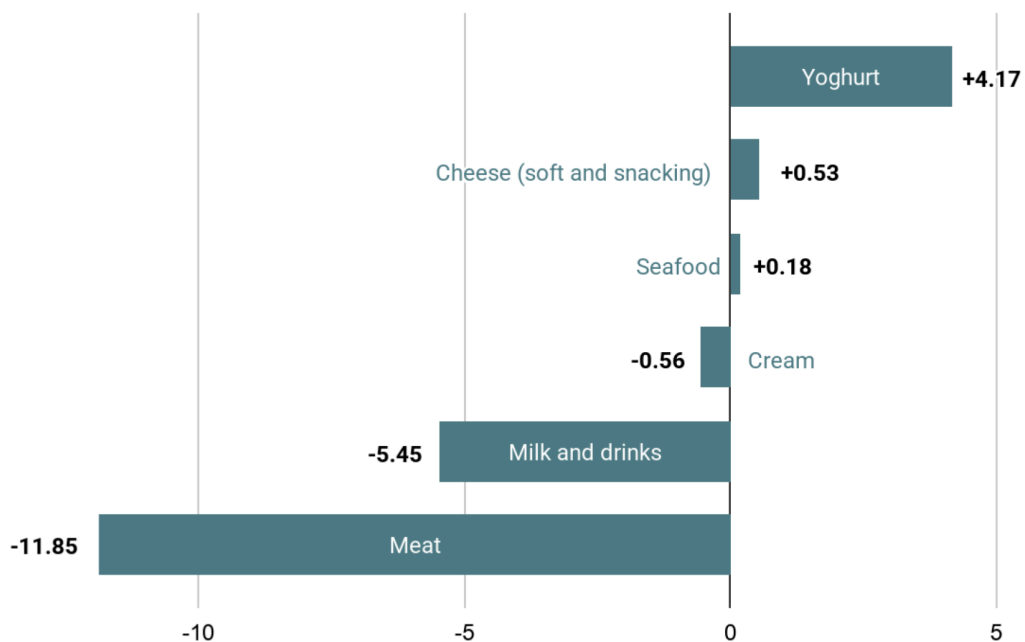
¹ Note that the Circana dataset did not include complete data on animal-based meat and seafood, and it was therefore not possible to calculate overall market shares for plant-based meat and seafood.

Plant-based food sales value and growth rates* by category in UK supermarkets excluding discounters, 2025 (£ millions)



* The percentages above each column denote the change in sales value of that category between 2024 and 2025.

Plant-based food sales absolute change in unit sales by category in UK supermarkets excluding discounters, 2024-2025 (change in million units)



Branded versus private label

Private-label plant-based sales (supermarket own-brand products) accounted for 9.9% of sales value, 13.6% of unit sales and 16.9% of sales volume in 2025.

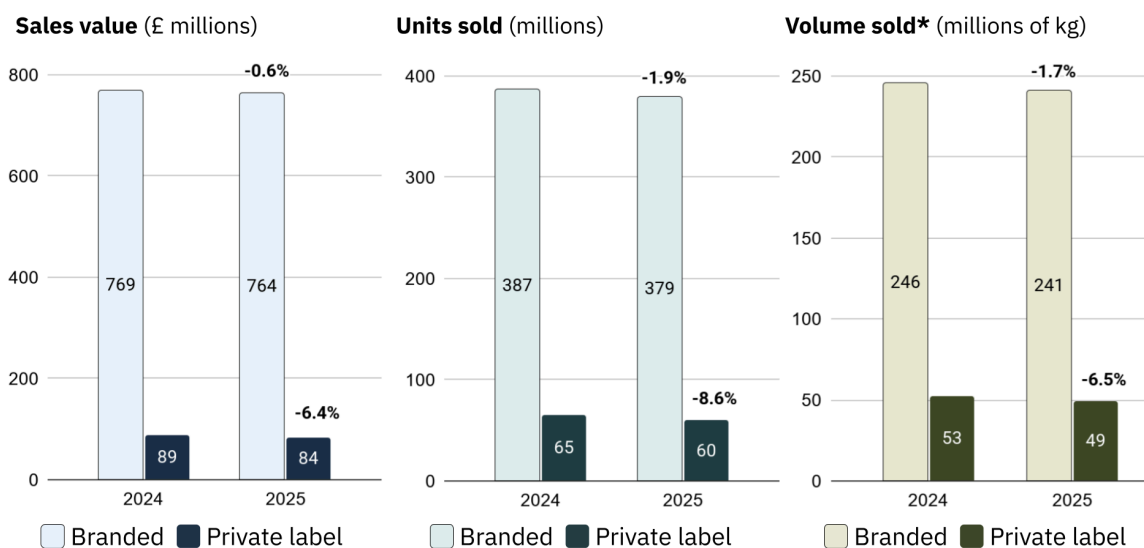
In 2025, private-label sales declined faster than branded sales despite their lower prices. Sales volume was down 6.5% for private-label products and down 1.7% for branded products. This trend may be linked to actual or perceived product performance.

As the Circana dataset does not cover discounter retailers such as Aldi and Lidl, both of which have their own plant-based ranges, the figures here probably underestimate the true share of private-label plant-based sales.

Plant-based sales and growth rates across six product categories in UK supermarkets excluding discounters, by branded or private label, 2024-2025

	Sales value		Unit sales		Sales volume	
	2025, £ million	2024-25 change	2025, million units	2024-25 change	2025, million kg	2024-25 change
Branded	764	-0.6%	379	-1.9%	241	-1.7%
Private label	84	-6.4%	60	-8.6%	49	-6.5%

Plant-based food sales across six categories in UK supermarkets excluding discounters, branded versus private label, 2024-2025



*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. The dataset does not cover private-label plant-based cheese.

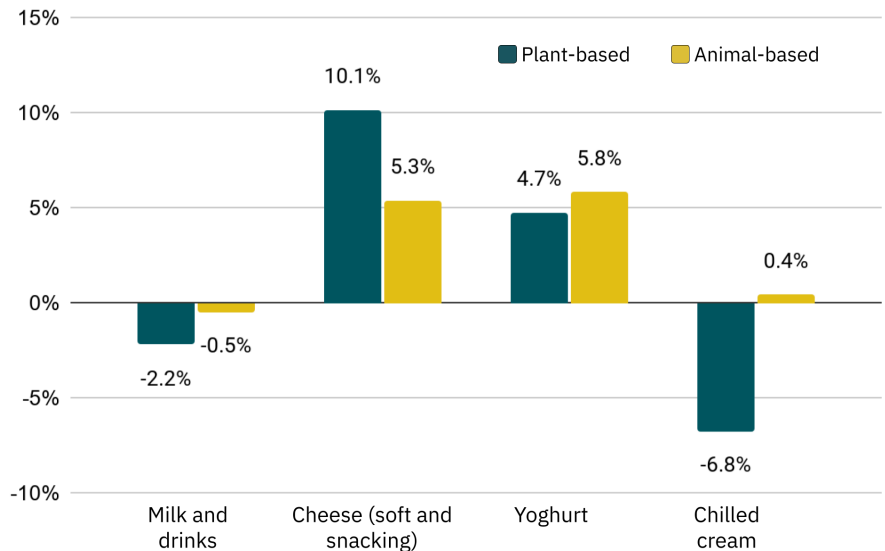
Comparison to animal-based foods

In the milk and drinks and chilled cream categories, plant-based sales volume fell in 2025, while animal-based sales volume remained steady.

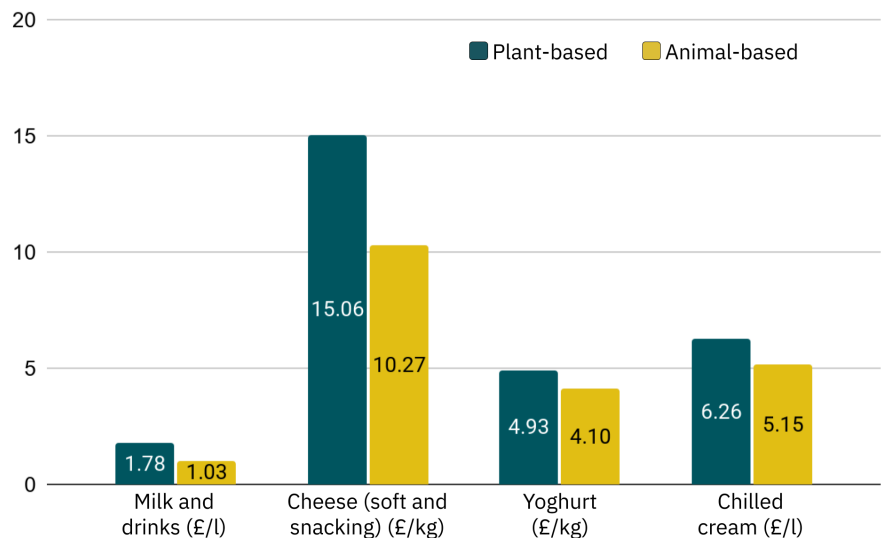
In soft and snacking cheese, plant-based sales volume grew faster than animal-based sales volume on a percentage basis. However, the much larger size of the animal-based market meant that its absolute sales volume increase was larger than that of plant-based.

Plant-based options were consistently more expensive per kg or per litre than animal-based equivalents for all four categories for which both plant- and animal-based price data were available.

Change in the sales volume of pre-packaged plant- and animal-based foods in UK supermarkets excluding discounters, 2024-2025 (%)



Average price per kg or litre of plant- and animal-based foods in UK supermarkets excluding discounters, 2025 (£ per kg or l)



Household purchase patterns

For a complementary view of the retail sales data from Circana (which does not cover discounters), GFI Europe obtained household panel data from [NIQ Homescan](#), which tracks foods purchased and brought home by a panel of 30,000 households. The data is nationally representative of households in the UK. It covers discounter stores (such as Aldi and Lidl) as well as supermarkets.

The NIQ data shows 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).

In 2025, 31.2% of households bought plant-based meat at least once, down from 35.4% in 2023. 8.1% of households were frequent purchasers of plant-based meat, down from 9.6% in 2023. The share of sales value from discounter stores rose from 11.4% in 2023 to 13.2% in 2025, indicating that a growing proportion of plant-based meat sales are not captured in the Circana data. However, the downward trend in households purchasing plant-based meat is consistent with the falling retail sales shown in the Circana data.

The share of households purchasing plant-based milk at least once per year remained almost steady between 2023 and 2025, at 31.3% in 2025. Just over 10% of households were frequent purchasers of plant-based milk in 2025. A growing proportion of sales value came from discounters, at just under one-quarter in 2025.

Household purchase patterns for plant-based foods in the UK, 2023-2025

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		
	2023	2024	2025	2023	2024	2025	2023	2024	2025	2023	2024	2025
Plant-based meat	35.4%	31.7%	31.2%	14.9%	13.3%	12.8%	9.6%	8.7%	8.1%	11.4%	11.6%	13.2%
Plant-based milk	31.1%	31.7%	31.3%	15.7%	15.8%	15.6%	10.5%	10.5%	10.3%	22.8%	22.2%	23.5%

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

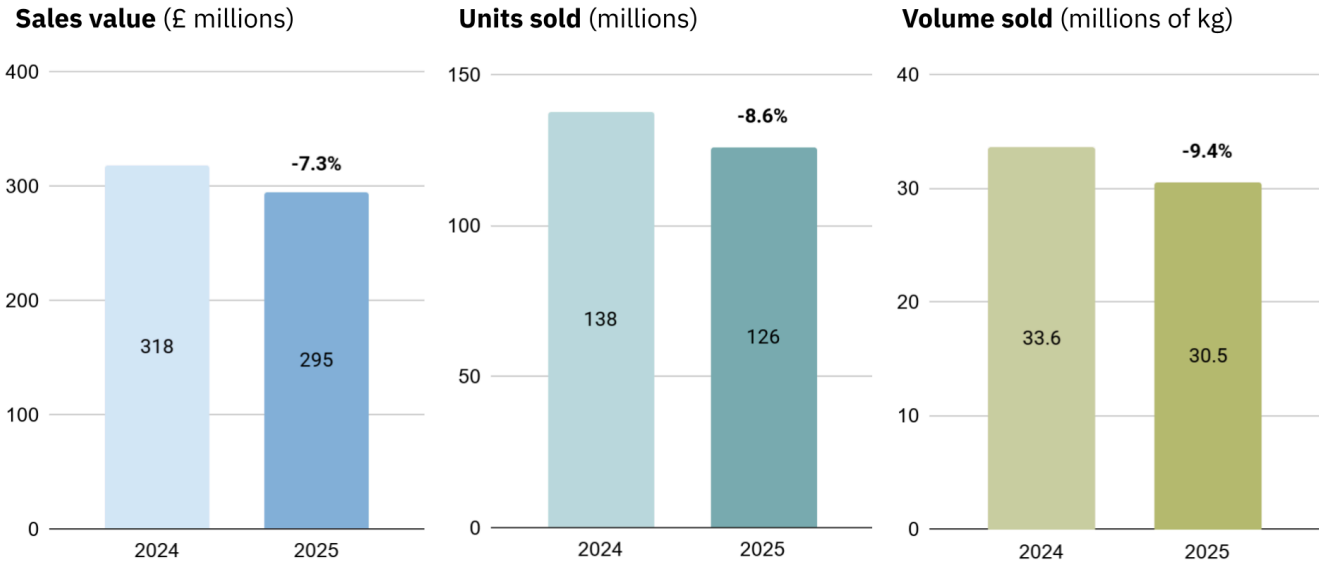
Total market

Sales of plant-based meat in UK supermarkets (excluding discounter stores) fell in 2025, but separate data from NIQ suggests that some demand for plant-based meat may have shifted towards discounter stores.

In this report, plant-based meat is defined as those products that are explicitly positioned as replicating the taste and texture of meat.² The annual sales value of plant-based meat fell by 7.3% in 2025 to £295 million. Unit sales fell by 8.6% to 126 million. Sales volume fell by 9.4% to 30.5 million kg.

Non-analogue meat alternatives³ such as bean burgers and falafel, are not included in the plant-based meat total. Their sales volume in 2025 was 9.5 million kg, down by 11.4% from 2024.

Plant-based meat sales in UK supermarkets excluding discounters, 2024-2025



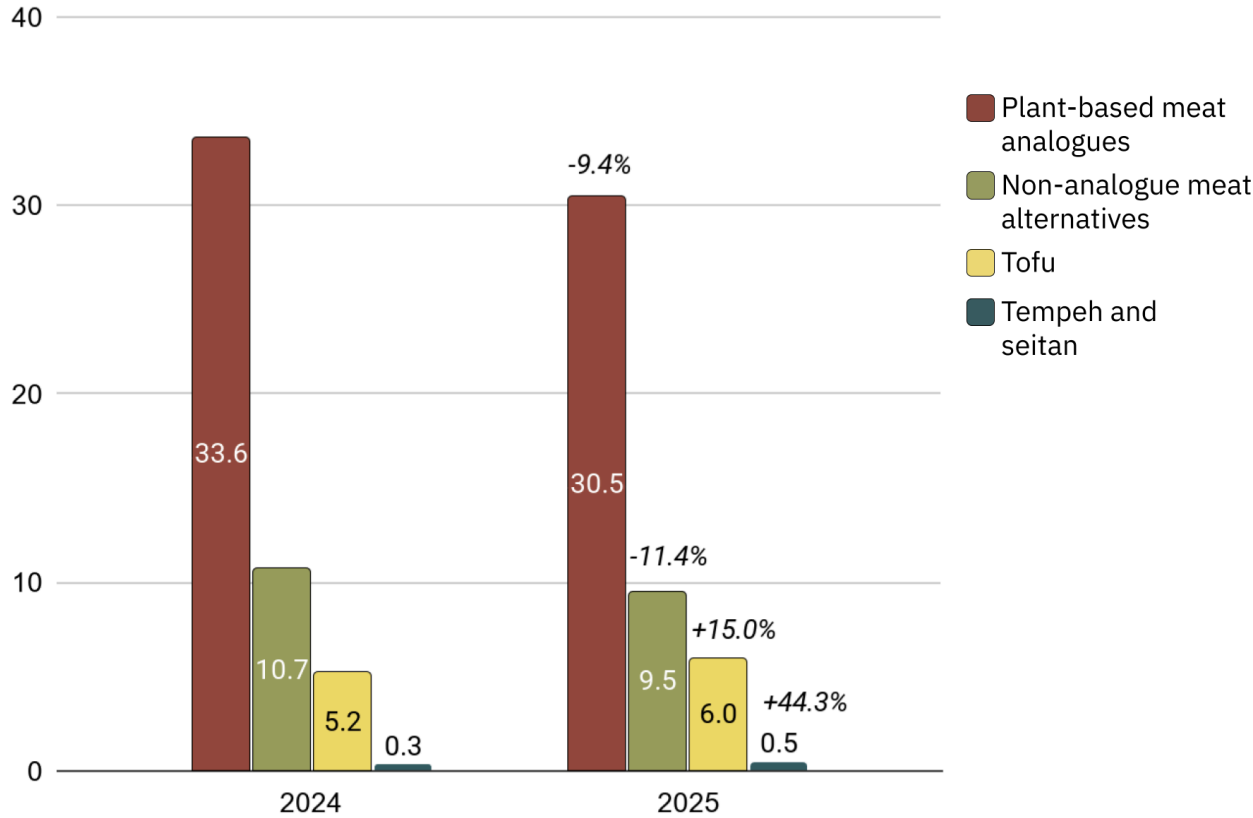
² It includes some products that are primarily based on plant-based ingredients but also incidentally contain small amounts of dairy or egg. Ready meals are excluded.

³ Those based on vegetables, lentils, beans, or jackfruit that are not marketed as mimicking meat (for example bean burgers or falafel). Ready meals are excluded. Due to a change in the data structure compared to the previous edition of this report, the non-analogues category also includes some vegetarian meat alternatives based on eggs or dairy, whereas in the previous edition of this report, only vegan non-analogues were reported.

Tofu, tempeh and seitan are also not included in the plant-based meat total. Their combined sales volume in 2025 was 6.5 million kg, up 16.8% from 2024. Sales here are likely driven by the affordability of tofu, which at an average of £7.73/kg in 2025 was cheaper than the average of £9.67/kg for plant-based meat. Another contributing factor could be consumer interest in foods perceived as less processed. Furthermore, availability increased as many new tofu products were launched in 2025. Further details are given in the next chapter, “Spotlight on tofu, tempeh and seitan”.

In 2025, the sales volume of plant-based meat was 90% higher than that of non-analogue meat alternatives, tofu, tempeh and seitan combined. This shows that despite falling sales, products that offer a similar taste, texture or format to conventional meat retain broader appeal among UK consumers.

Sales volume of plant-based meat versus other meat alternatives in UK supermarkets excluding discounters, 2024-2025 (millions of kg)



Branded versus private label

The proportion of plant-based meat sales that were private-label (supermarket own-brand products) fell slightly from 13.1% to 12.2% of sales volume in 2025.

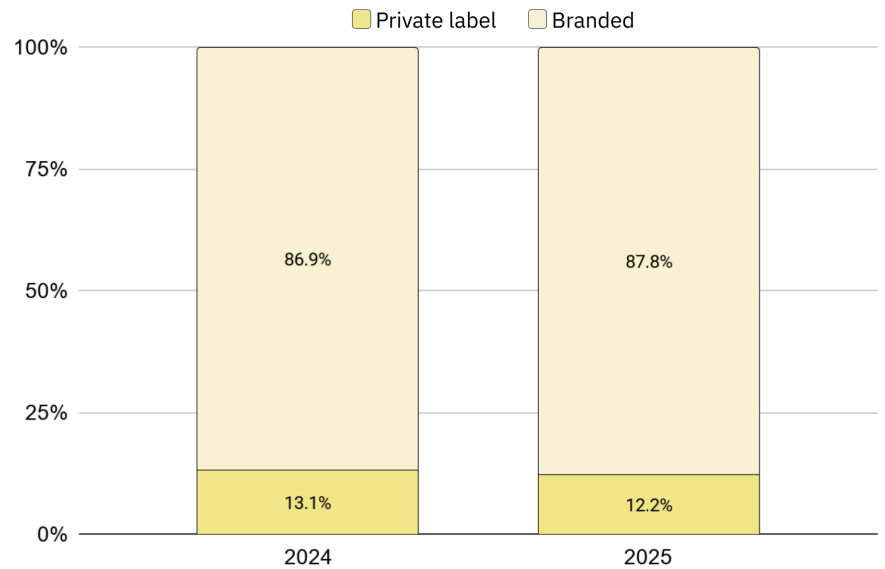
In terms of absolute sales volume, branded products saw an 8.5% fall, and private-label products saw a 15.7% fall.

The true proportion of private-label sales is likely to be underestimated by this dataset due to the lack of coverage of discounter stores such as Aldi and Lidl, both of which have their own plant-based ranges.

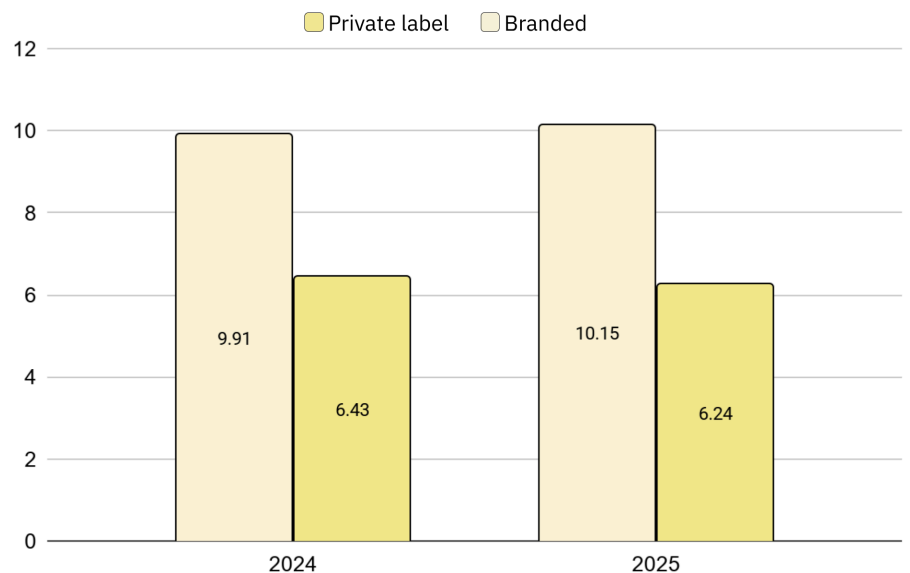
Private-label options were 38% cheaper per kg in 2025 than branded products.

See the household panel section below for trends in discounter sales.

Plant-based meat sales in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (% of sales volume)



Average price per kg of plant-based meat in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (£/kg)



Product format breakdown

Frozen products made up 57% of sales volume in both 2024 and 2025.

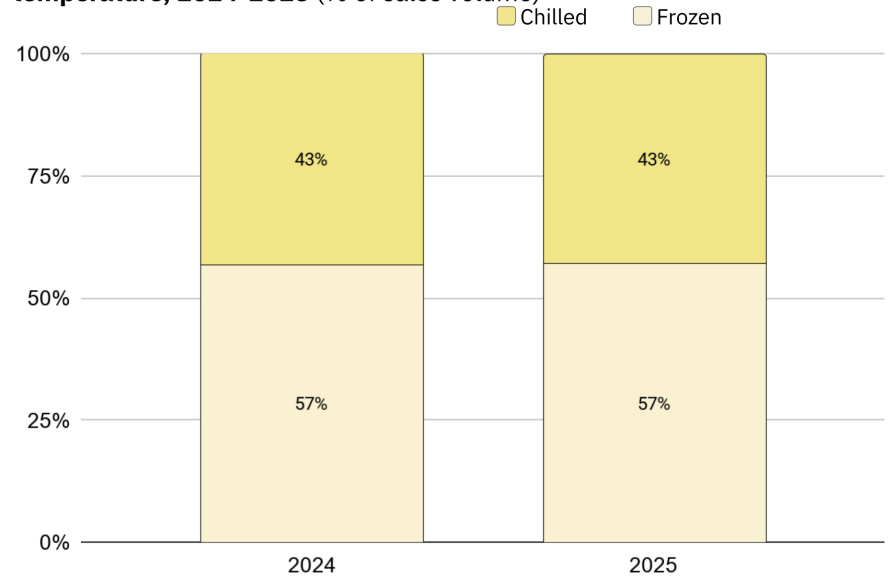
Frozen plant-based meat was considerably cheaper than chilled products in 2025, at £7.25/kg, compared with £12.90/kg for chilled.

The most common ingredient base for plant-based meat in 2025 was mycoprotein, with 43.1% of sales volume. Mycoprotein is produced by fermentation but is typically positioned alongside plant-based meat on the UK market, replicating animal-based meat's taste, texture and format.

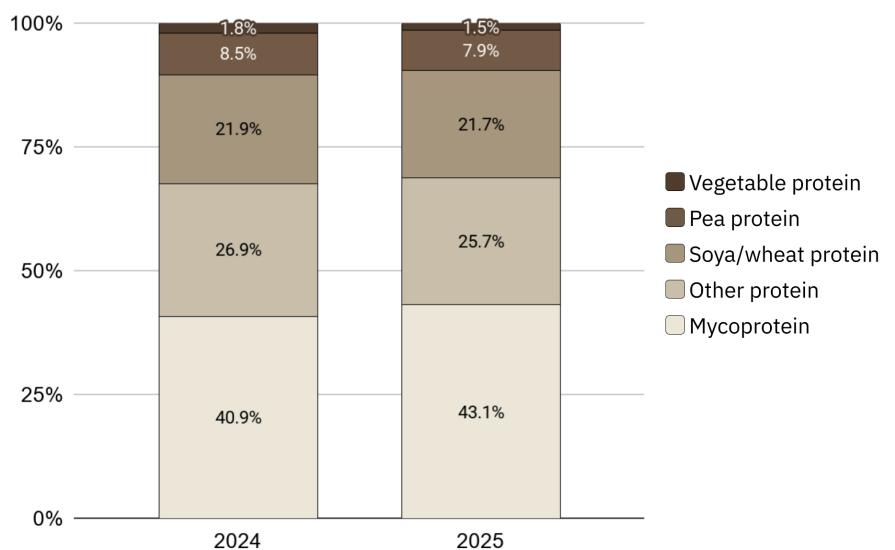
Soya/wheat protein was the cheapest protein type, at an average of £9.06/kg in 2025.

Note that these figures are for products explicitly intended to replicate the taste or texture of meat. Among non-analogue products, other base ingredients such as vegetables, mushrooms, nuts, jackfruit or beans are more common.

Plant-based meat sales in UK supermarkets excluding discounters, by temperature, 2024-2025 (% of sales volume)



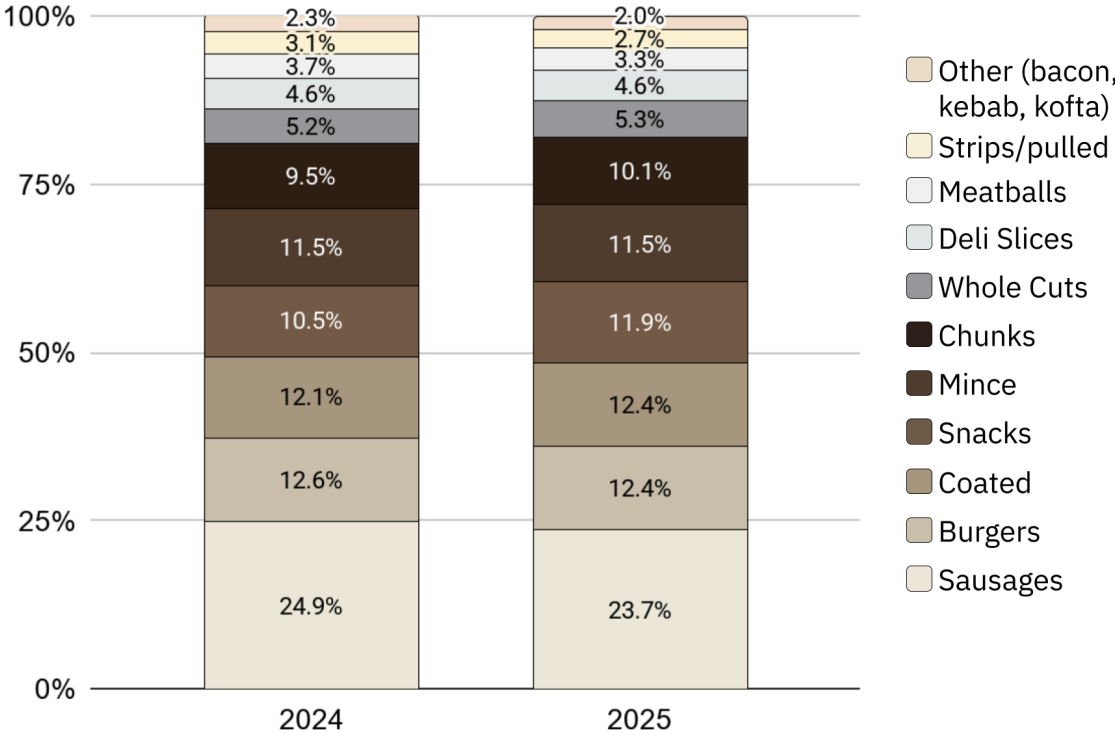
Plant-based meat sales by protein type in UK supermarkets excluding discounters, 2024-2025 (% of sales volume)



The UK has a mature plant-based market with many formats available. Sausages were the leading format in 2025, at 23.7% of sales volume, followed by burgers (12.4%), coated meat at 12.4% (eg, nuggets or escalopes), snacks at 11.9% (eg, sausage rolls or bites), mince (11.5%) and chunks (10.1%). There was no significant shift between 2024 and 2025.

The cheapest segments in 2025 were mince (£6.39/kg), meatballs (£7.27/kg) and sausages (£7.58/kg). The most expensive were deli slices (£20.92/kg) and bacon (£20.68/kg).

Plant-based meat sales in UK supermarkets excluding discounters, by format, 2024-2025 (% of sales volume)



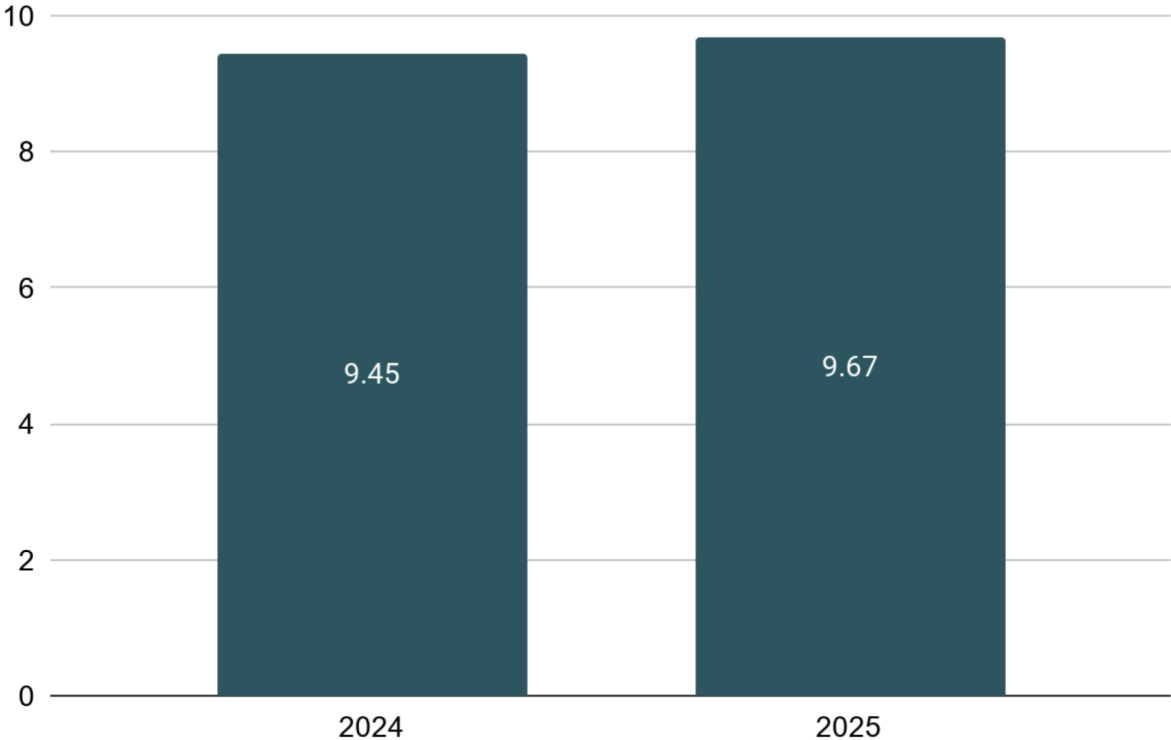
Price trends

The average price of plant-based meat rose by 2.3% from 2024 to 2025. For comparison, [inflation](#) across the UK's entire food and catering sector was 4.8% during 2025.

Complete animal-based meat data was not available from Circana. However, data published by the [AHDB](#) showed that animal-based beef prices rose by 17.1% in 2025,⁴ lamb prices rose by 4.3%, and pork prices rose by 1.7%.

[Separate analysis from GFI Europe](#) shows that plant-based mince products available at Tesco had a considerable price advantage over their animal-based equivalents in early 2026, possibly contributing to rising sales of plant-based mince [reported](#) by Tesco.

Average price per kg for plant-based meat in UK supermarkets excluding discounters, 2024-2025 (£/kg)



⁴ The 12 weeks leading to 25 January 2026, compared with the same 12-week period in the previous year.

Household panel data

Household panel data from NIQ Homescan showed that the proportion of UK households that bought plant-based meat at least once a year fell from 35.4% in 2023 to 31.7% in 2024, settling at 31.2% in 2025.

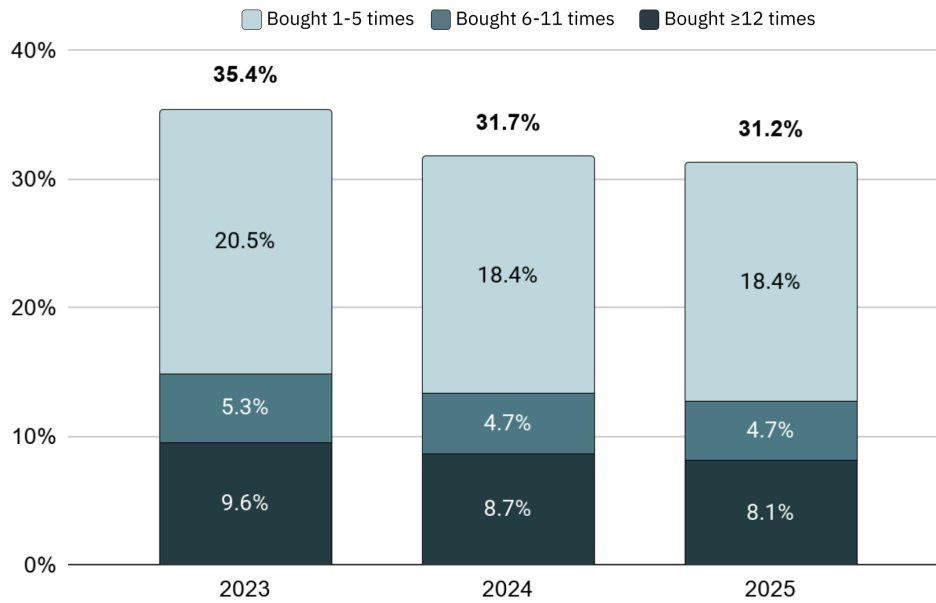
The proportion of frequent purchasers, who bought an average of once a month or more often, also fell from 9.6% in 2023 to 8.1% in 2025.

NIQ estimates that the annual sales value of plant-based meat from retailers (supermarkets and discounters combined) fell by 2.7% between 2024 and 2025 – a lower rate of decline than the 7.3% fall shown in the Circana data above.

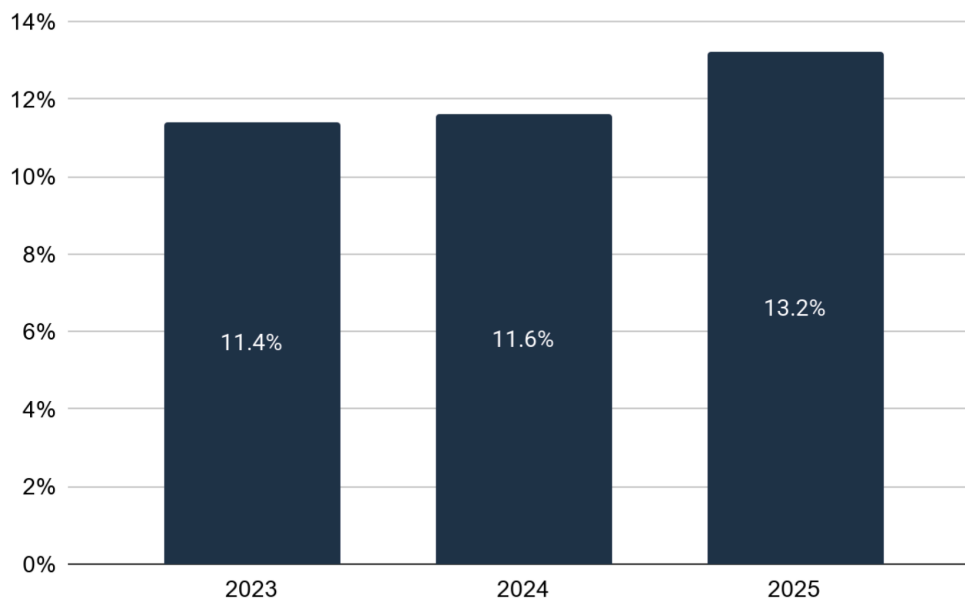
NIQ likely defines the plant-based meat category more broadly than the stricter definition used to analyse the Circana retail sales data, above, which could explain why the Circana dataset shows a steeper fall in sales.

Another contributing factor is the proportion of sales from discounter stores such as Aldi and Lidl, which, according to NIQ, rose from 11.6% in 2024 to 13.2% in 2025. This rising proportion of discounter sales is not captured in the Circana data.

Annual household purchase patterns for plant-based meat in the UK, 2023-2025 (% of households)



Household purchase patterns for plant-based meat in the UK: proportion of sales value from discounter stores, 2023-2025 (%)



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".

Spotlight on tofu, tempeh and seitan

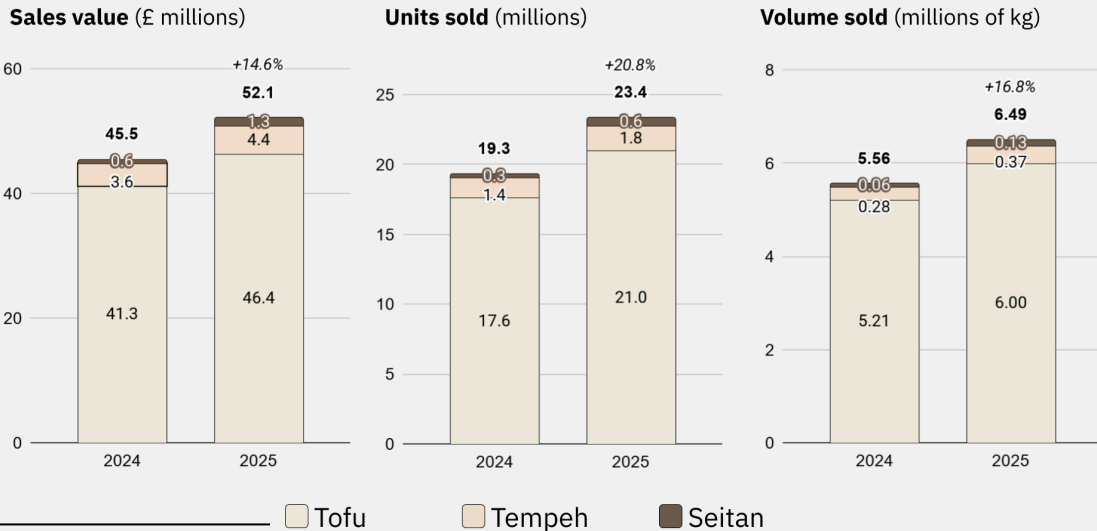
Total market

Tofu, tempeh and seitan⁵ are traditional foods with a long history in Asian cooking. They are not classed as plant-based meat in this report because, in the UK market, these products are not typically positioned as direct substitutes that aim to replicate the taste or texture of meat, in contrast to the newer wave of innovative plant-based meat substitutes that have grown in popularity over the past decade or so. However, they provide an interesting case study to compare with sales trends of plant-based meats that do aim to replicate the taste or format of meat, with their rise in popularity across [several countries](#) potentially linked to consumer interest in less processed foods.

In 2025, the combined annual sales value of tofu, tempeh and seitan rose by 14.6% to £52.1 million. Unit sales rose by 20.8% to 23.4 million. Sales volume rose by 16.8% to 6.49 million kg. Tofu made up the vast majority of this subcategory.

Despite this rapid growth, plant-based meat had a sales volume 4.7 times higher than tofu, tempeh and seitan combined in 2025, showing that products that offer a meaty taste or texture have broader appeal among UK consumers.

Tofu, seitan and tempeh sales in UK supermarkets excluding discounters, 2024-2025



⁵ Tofu is a product originating in China over 2,000 years ago, made from soy milk curds. Tempeh is a traditional Indonesian product made from fermented soybeans. Seitan is made from wheat gluten and historically used in various Asian cuisines; the data here includes dry powders for making seitan products at home as well as seitan blocks and pieces.

Branded versus private label

The proportion of tofu, tempeh and seitan sales volume made up of private-label products rose from 16.9% in 2024 to 22.7% in 2025.

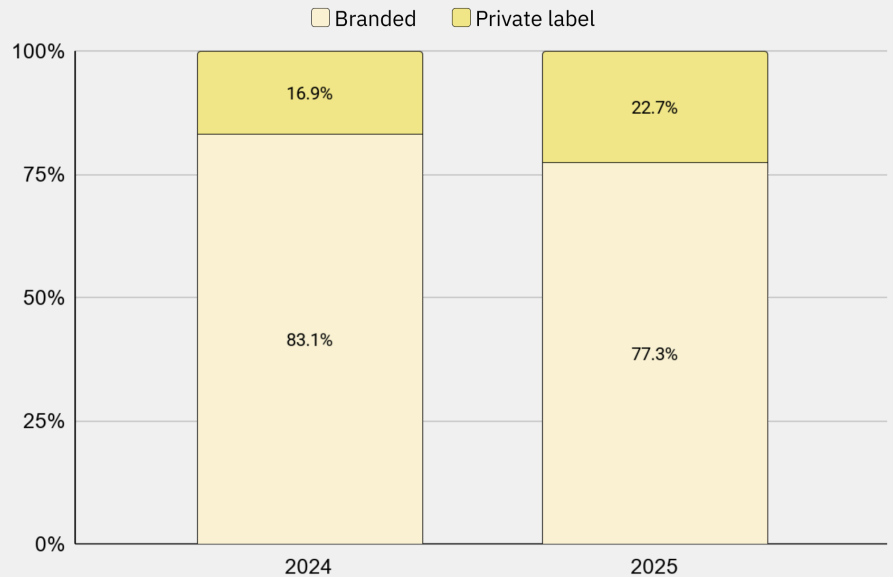
Branded sales volume rose by 8.7%, while private-label sales volume rose by 57%.

This rise may have been driven by the improved affordability of private-label products, which fell 5% in price during 2025 to £4.99/kg.

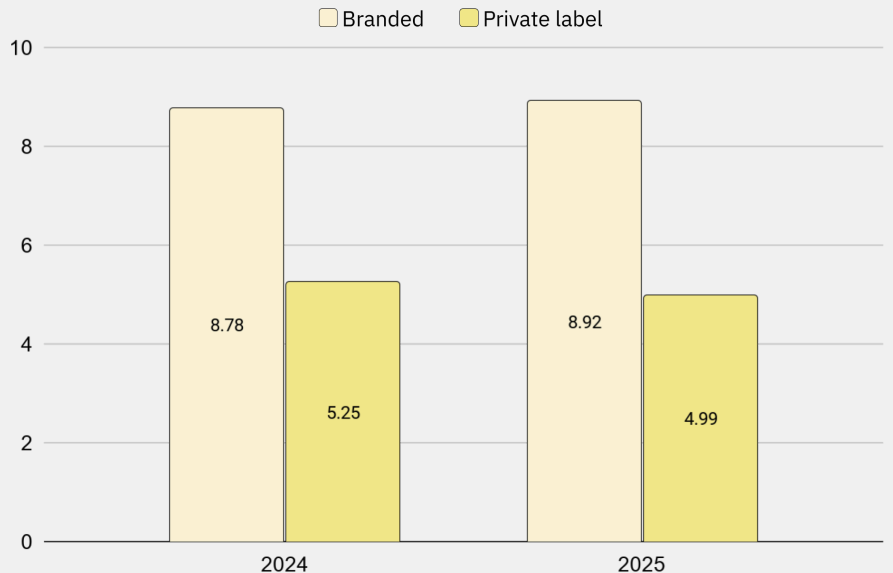
In 2025, private-label products were 44% cheaper per kg than branded products.

All private-label sales in this analysis were of tofu, as no private-label tempeh or seitan products were included in the data.

Tofu, tempeh and seitan sales in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (% of sales volume)



Average price per kg of tofu, tempeh and seitan in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (£/kg)



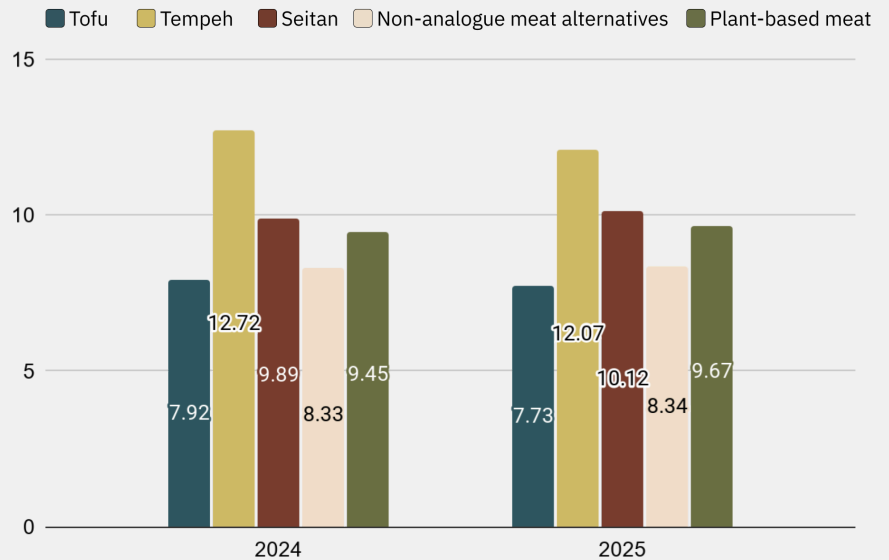
Price trends

Tofu was cheaper in 2025 than tempeh, seitan, plant-based meat and non-analogue meat alternatives.

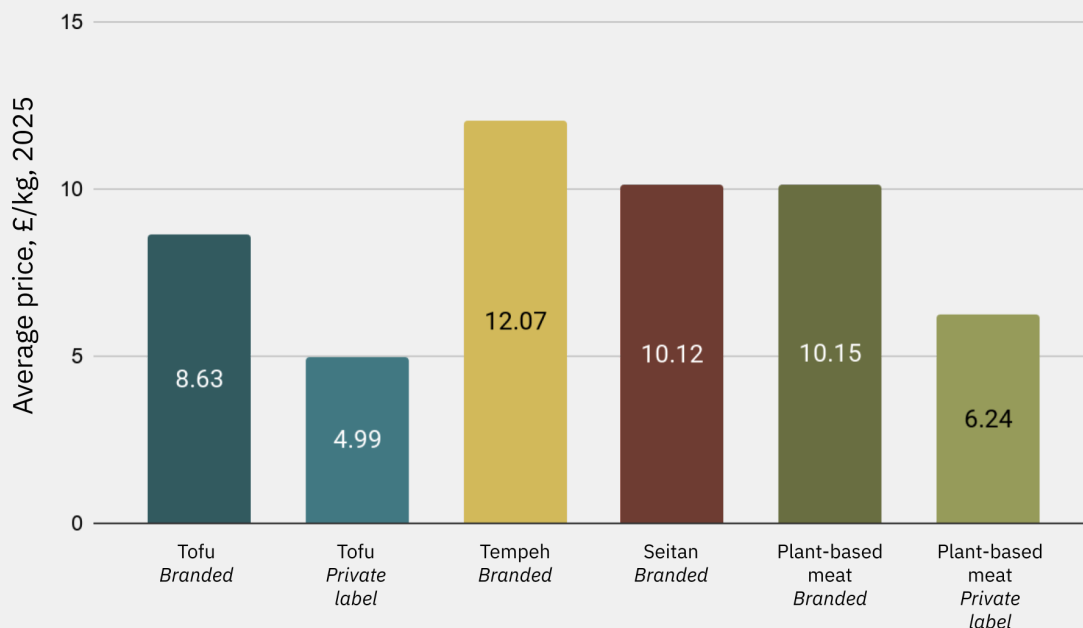
Private-label tofu was particularly cheap, at £4.99/kg.

Tofu's affordability helps explain its much larger sales volume, compared with tempeh and seitan. Tempeh and seitan are also not as well-established or widely available in the UK market as tofu, and consumers may not be as familiar with them.

Average price per kg for tofu, tempeh, seitan, non-analogue meat alternatives and plant-based meat in UK supermarkets excluding discounters, 2024-2025 (£/kg)



Average price per kg for tofu, tempeh seitan and plant-based meat segments in UK supermarkets excluding discounters, by branded or private label, 2025 (£/kg)



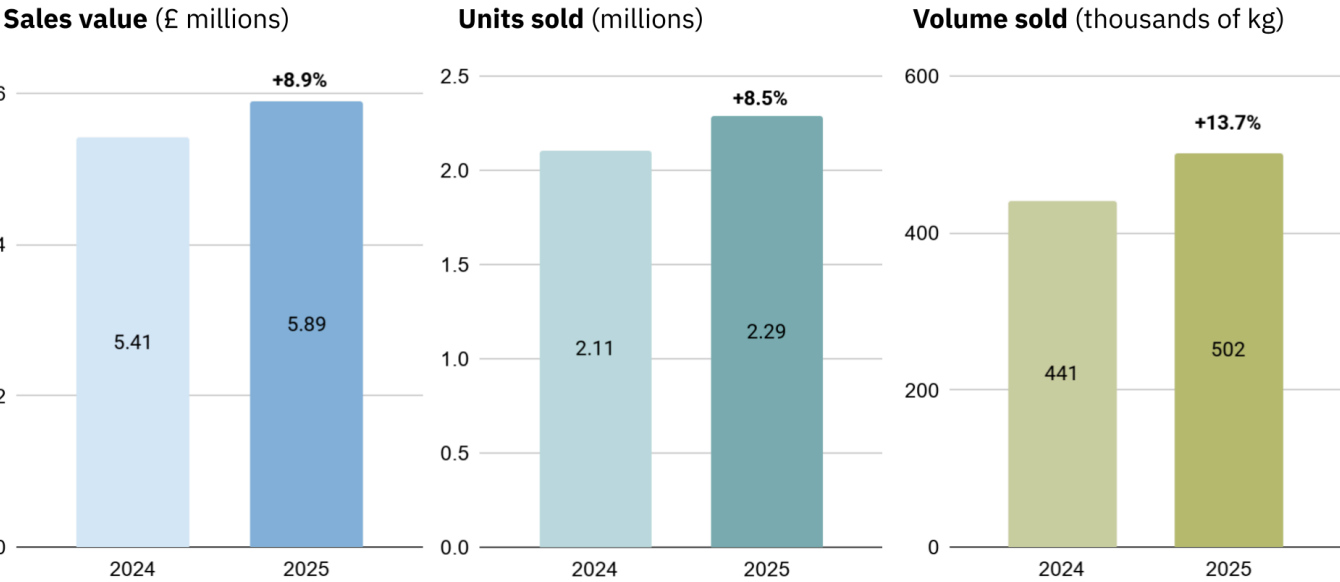
Plant-based seafood

Total market

The UK's small plant-based seafood (for example, plant-based salmon, prawns and fish fingers) market grew in 2025. Annual sales value rose by 8.9% to £5.89 million, unit sales rose by 8.5% to 2.29 million, and sales volume rose by 13.7% to 502,000kg.

The greater rise in sales volume, compared with sales value, can be attributed to a fall in average price.

Plant-based seafood sales in UK supermarkets excluding discounters, 2024-2025



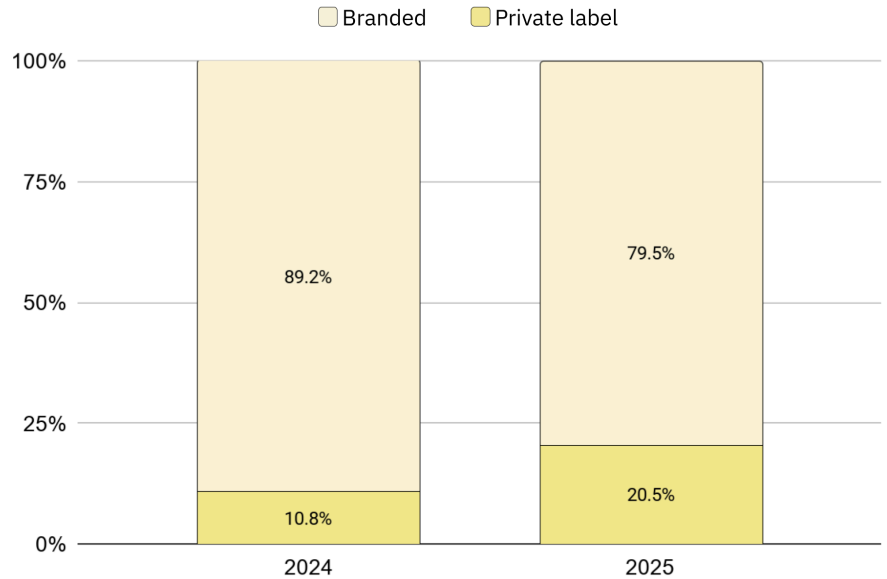
Branded versus private label

Private-label products nearly doubled their share of plant-based sales volume in 2025, reaching 20.5%.

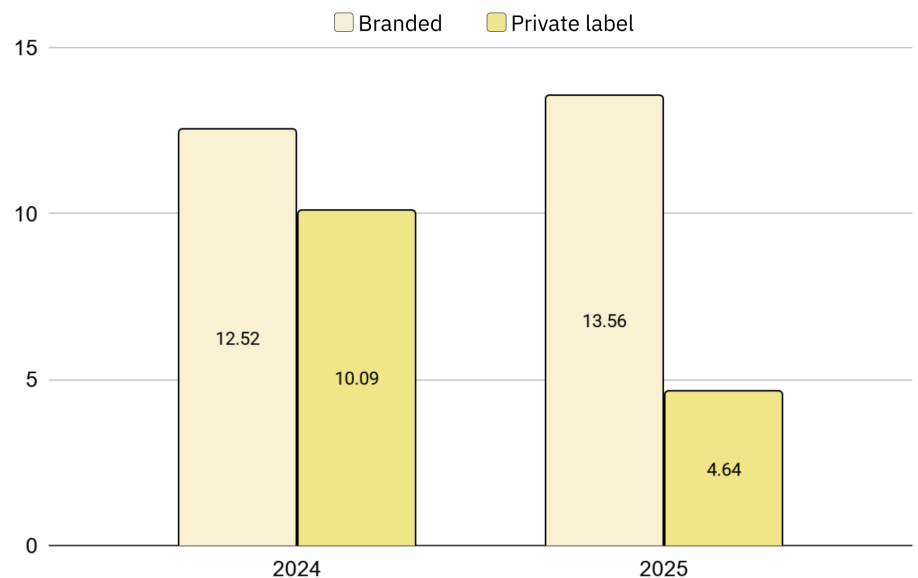
The jump in private-label share and the fall in price of private-label products can be attributed to the launch of a particular low-cost private-label product. In such a small category, even single product launches can have a noticeable effect on trends, causing volatility.

The average cost per kg of branded products, in contrast, rose in 2025.

Plant-based seafood sales in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (% of sales volume)



Average price per kg of plant-based seafood in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (£/kg)



Product format breakdown

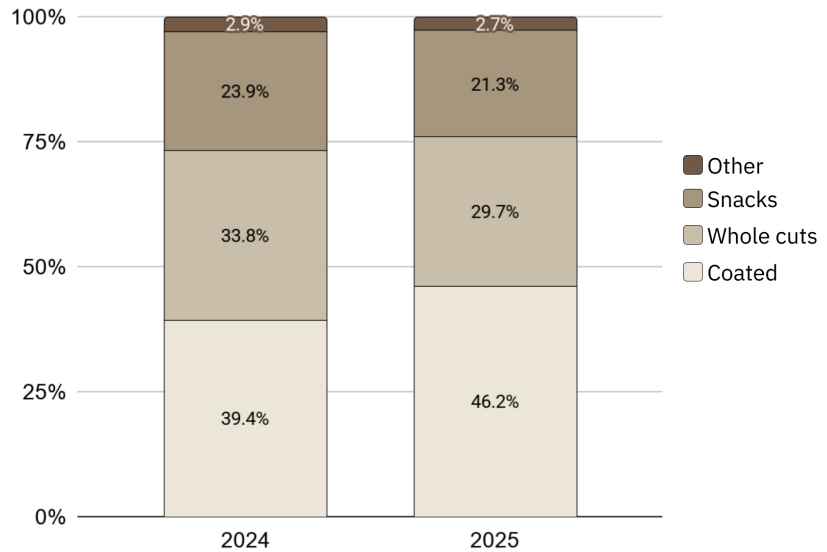
Coated products, such as fish cakes and fish fingers, grew to 46.2% of sales volume in 2025. This format was the cheapest segment, averaging £6.36/kg in 2025.

Whole cuts, such as fillets, were the second-largest segment, but their share of sales volume fell during 2025. Whole cuts were more expensive, at £13.64/kg in 2025.

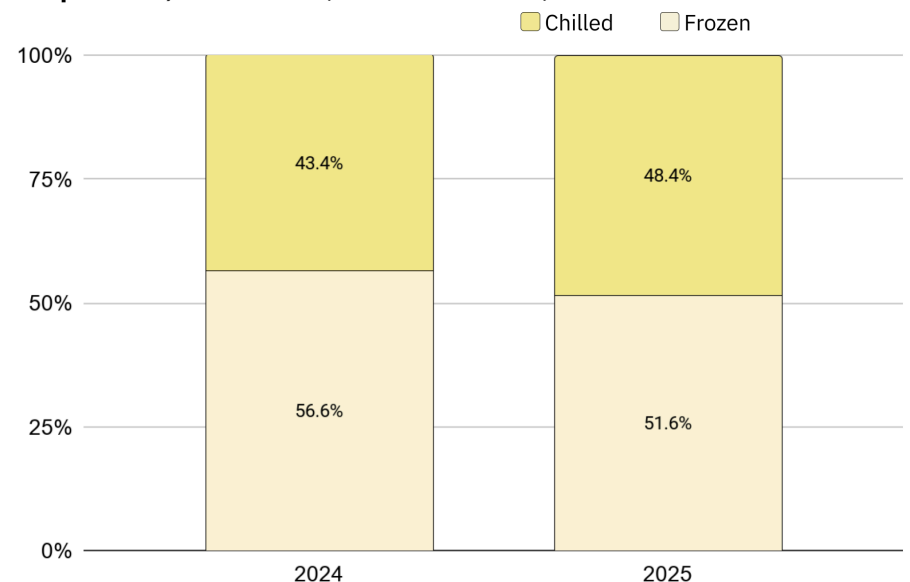
Frozen products made up just over half of sales volume in 2025, down slightly from 56.6% in 2024.

Frozen products were considerably cheaper on average in 2025, at £6.68/kg, compared with £17.12/kg for chilled products. This is partly due to cheaper formats such as fish fingers or fish cakes dominating the frozen segment, whereas more expensive formats such as salmon-style products appear in the chilled segment.

Plant-based seafood sales in UK supermarkets excluding discounters, by format, 2024-2025 (% of sales volume)



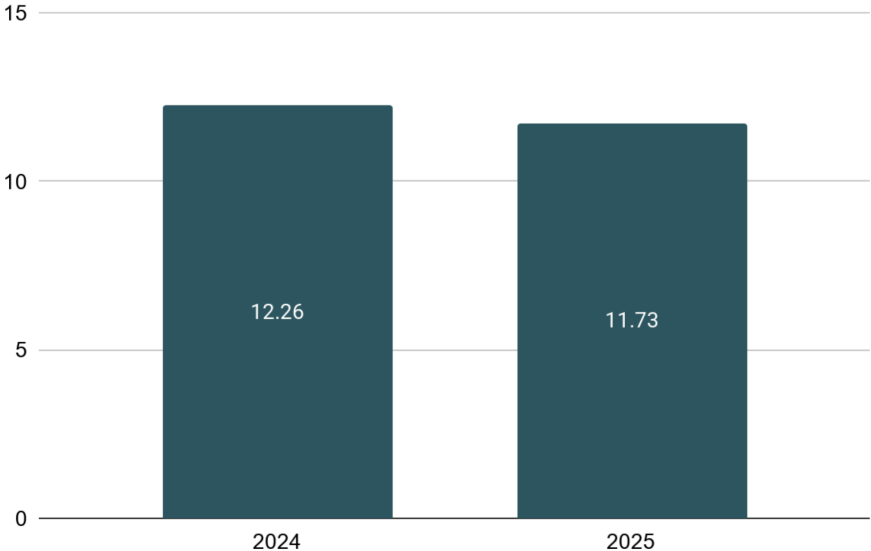
Plant-based seafood sales in UK supermarkets excluding discounters, by temperature, 2024-2025 (% of sales volume)



Price trends

The average price per kg for plant-based seafood fell by 4.3% in 2025, which can be attributed to the growth of the lower-cost private-label segment.

Average price per kg for plant-based seafood in UK supermarkets excluding discounters, 2024-2025 (£/kg)



Plant-based milk and drinks

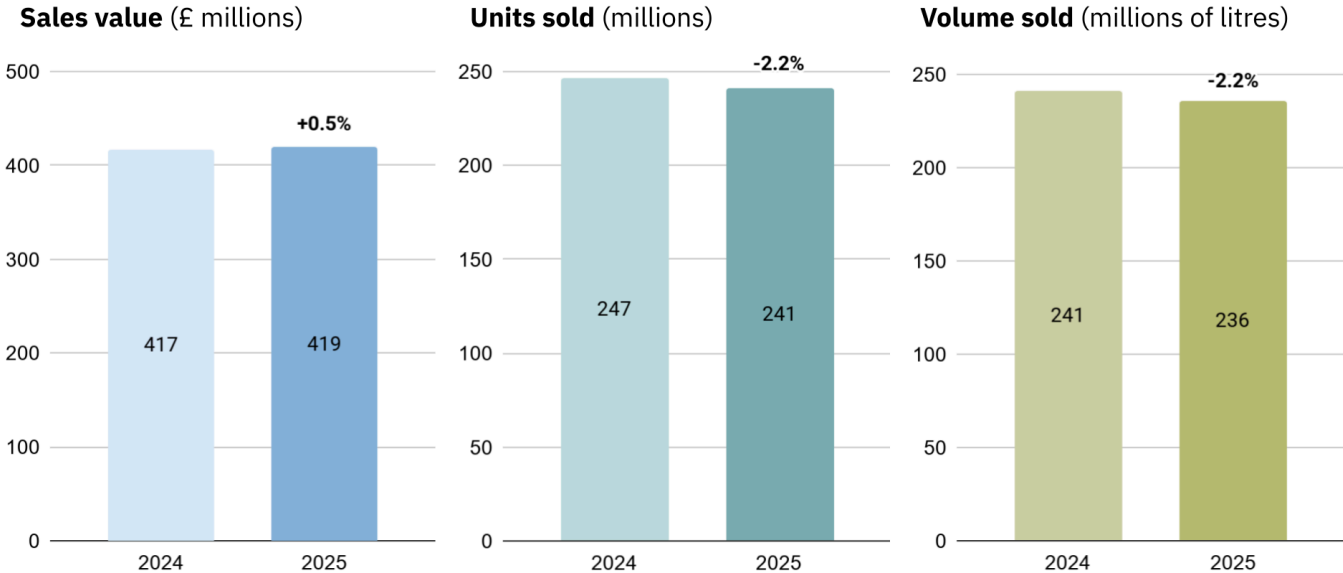
Total market

Sales of plant-based milk and drinks⁶ in UK supermarkets excluding discounters contracted slightly in 2025. However, household panel data from NIQ shows that the proportion of sales from discounters increased in 2025, and that, on average, more than 10% of households bought plant-based milk once a month or more. Meanwhile, [separate data](#) from Worldpanel by Numerator showed that sales of plant-based milk and drinks grew (up 3.2% in value and 0.4% in volume) in the year to June 2025. Overall, this suggests that the UK plant-based milk and drinks market remains resilient.

Annual sales value remained steady, increasing by 0.5% to £419 million in 2025. Unit sales fell by 2.2% to 241 million. Sales volume also fell by 2.2% to 236 million litres.

The disparity between sales value and sales volume trends indicates a slight rise in the average price per litre for both branded and private-label products.

Plant-based milk and drinks sales in UK supermarkets excluding discounters, 2024-2025



⁶ 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).

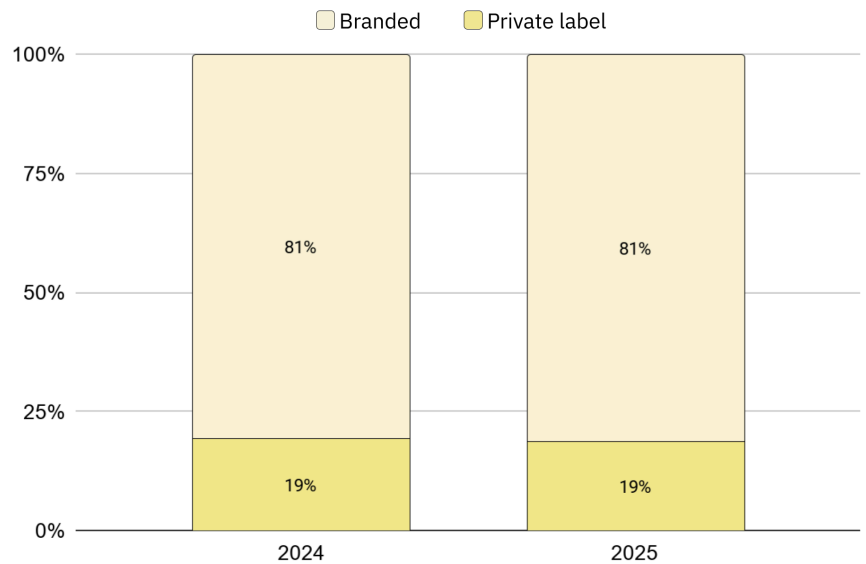
Branded versus private label

Branded plant-based milk and drinks accounted for just over four-fifths of sales volume in both 2024 and 2025.

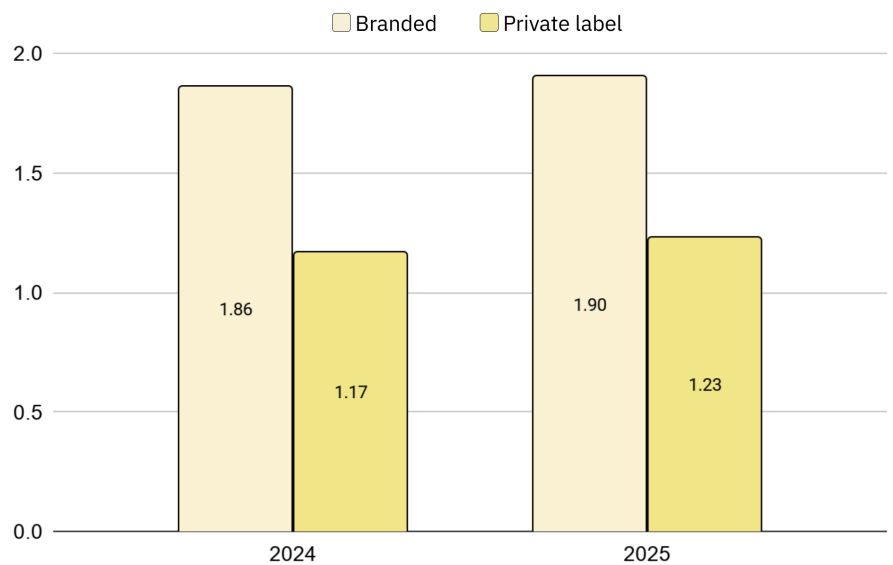
In 2025, private-label products were 35% cheaper than branded products.

Prices for both branded and private-label products rose slightly in 2025.

Plant-based milk and drinks sales in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (% of sales volume)



Average price per litre of plant-based milk and drinks in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (£/l)



Product format breakdown

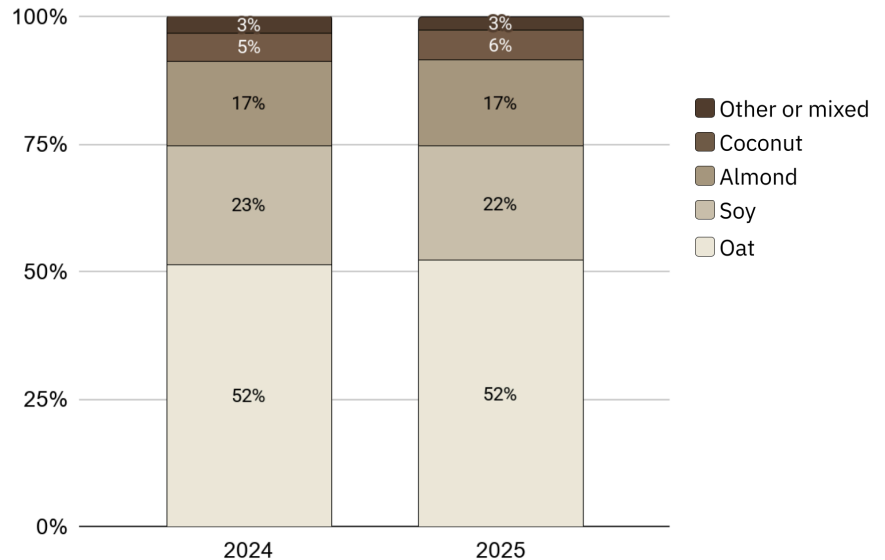
Oat-based beverages accounted for over half of sales volume in 2025, followed by soy at 22% and almond at 17%. There was little shift between 2024 and 2025.

Soy-based products were the cheapest of the four leading types, at £1.58/litre in 2025. Oat, despite its higher market share, was the most expensive, at £1.86/litre.

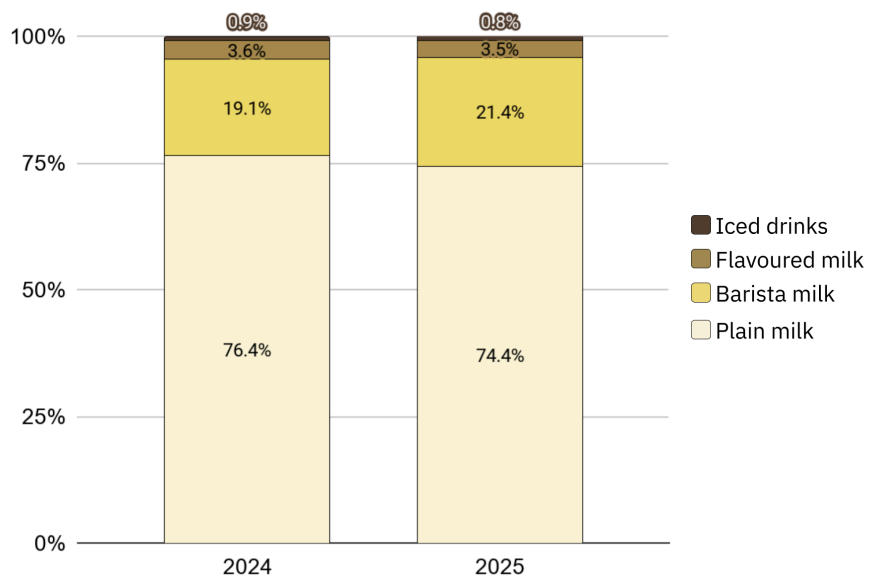
Barista-style products, which are designed to foam and perform well in hot drinks, grew by 10% in absolute sales volume and increased their share of sales volume to 21.4% in 2025.

The success of barista-style products, despite their higher price point (£1.89/litre in 2025) compared with plain milk (£1.70/litre), demonstrates the importance of good product performance.

Plant-based milk and drinks sales in UK supermarkets excluding discounters, by base ingredient, 2024-2025 (% of sales volume)



Plant-based milk and drinks sales in UK supermarkets excluding discounters, by type, 2024-2025 (% of sales volume)



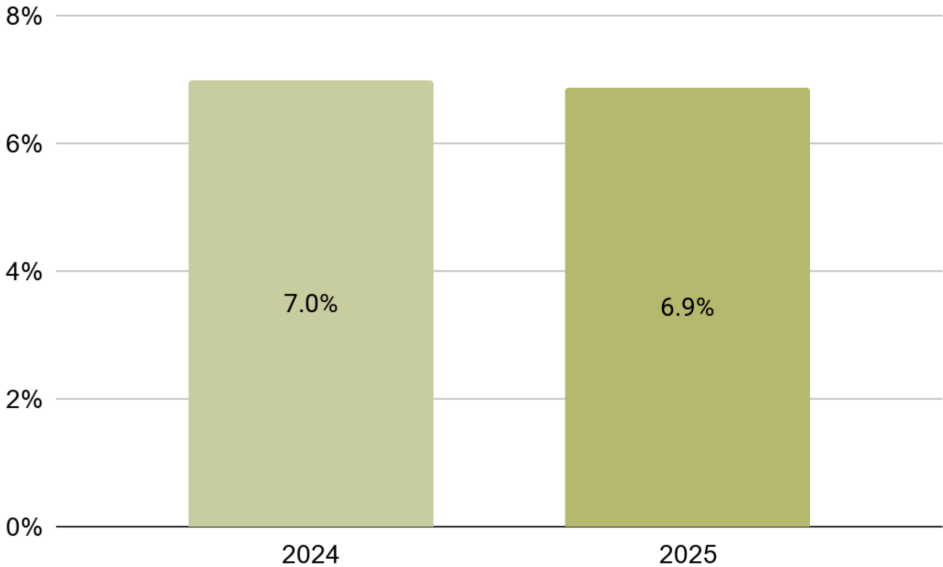
Market share

The market share of plant-based milk and drinks, as a proportion of total plant- and animal-based milk and dairy drinks sales volume,⁷ dipped slightly from 7.0% in 2024 to 6.9% in 2025. This was driven by the slight fall in plant-based sales volume, as that of animal-based milk remained steady in 2025.

This level of market share indicates that while plant-based milk and drinks are quite well established in the UK market, they have not yet achieved as large a market share as in some other countries [such as Spain](#), where plant-based options made up over 10% of sales volume in 2025.

A [sensory study](#) by NECTAR, conducted with American consumers and products, found that while 61% of participants liked the taste of a dairy milk benchmark product, only 34% liked plant-based milk, on average. However, there was a spread of performance across products, with 54% liking the top-performing plant-based milk product. This suggests that innovation to improve product performance is important if plant-based milk and drinks are to reach a larger audience.

Plant-based milk and drinks: share of total (plant- and animal-based) milk and dairy drinks sales in UK supermarkets excluding discounters, 2024-2025 (% of sales volume)



⁷ 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

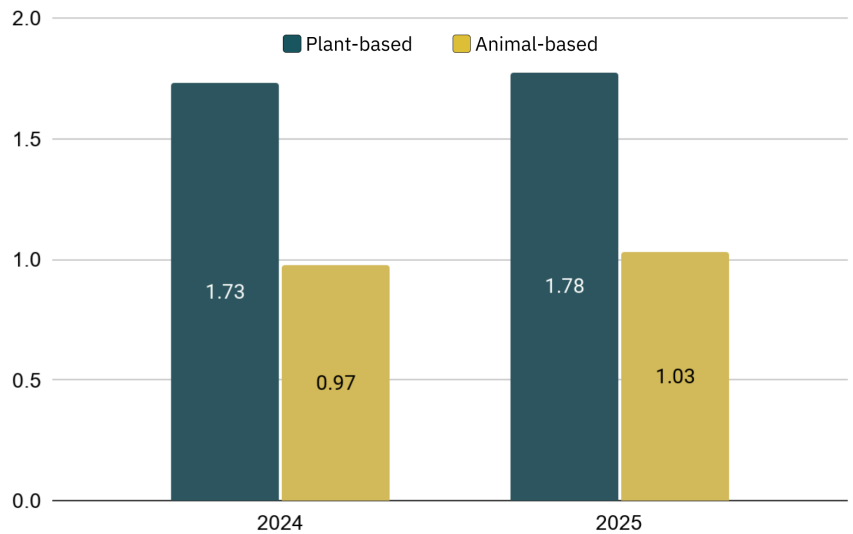
Both plant-based and animal-based milk and drinks grew more expensive per litre in 2025. The price gap fell slightly, with plant-based milk and drinks 72% more expensive per litre in 2025.

When comparing only branded products, the price gap was narrower, as branded plant-based options cost 22% more per litre than branded animal-based products in 2025.

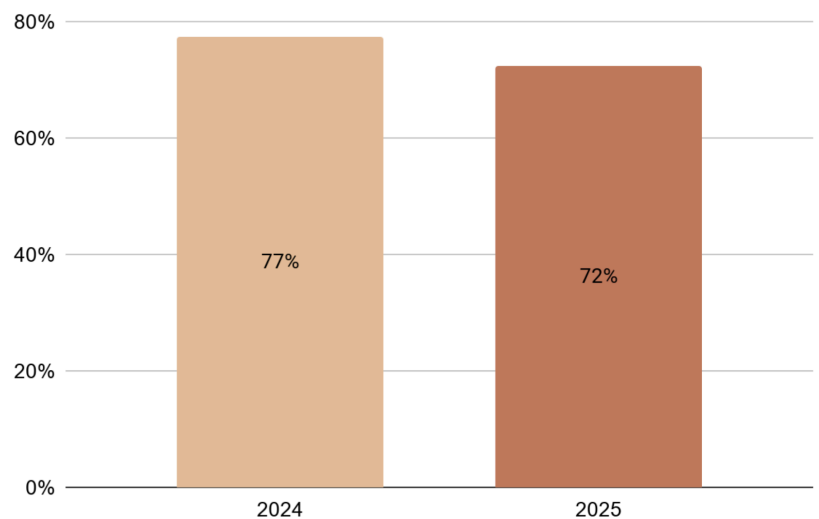
The gap was wider for the private-label segment, where plant-based products cost 40% more than their animal-based equivalents in 2025.

Nearly four-fifths of animal-based sales volume in 2025 came from private-label products, in contrast to plant-based products, where the majority were branded.

Average price per litre for plant-based and animal-based milk and dairy drinks in UK supermarkets excluding discounters, 2024-2025 (£/l)

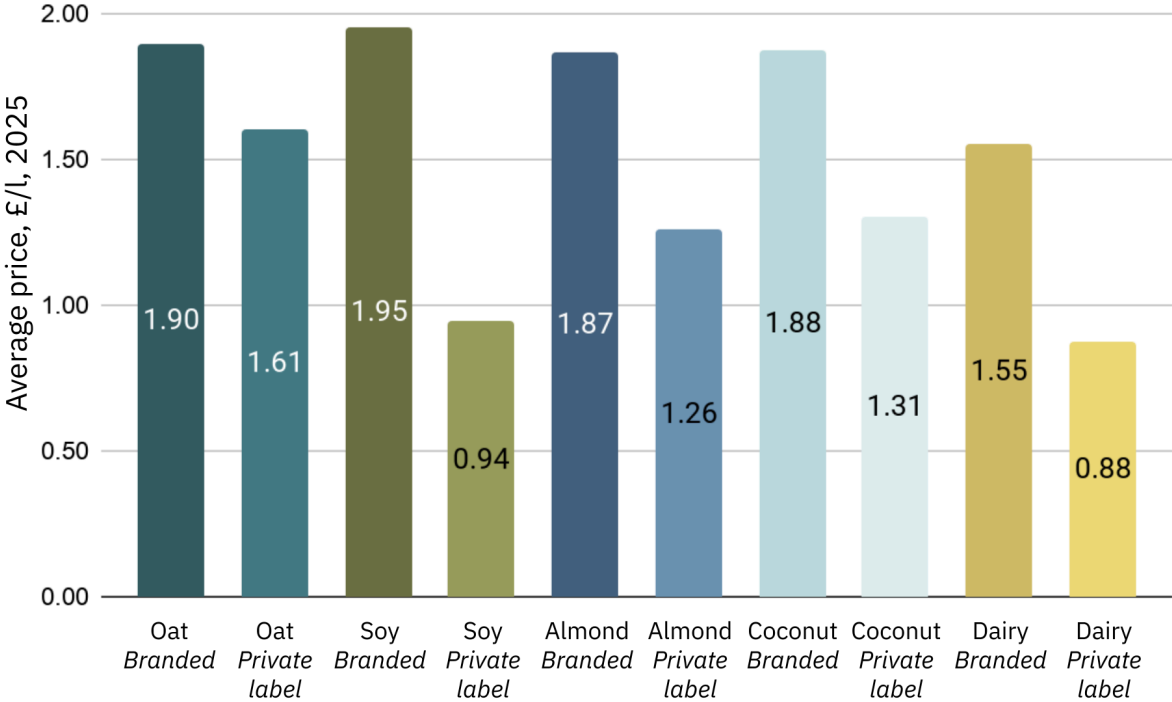


Price difference for plant-based milk and drinks compared with animal-based milk and dairy drinks in UK supermarkets excluding discounters, 2024-2025 (% difference based on £/l)



Of the four leading plant-based ingredient bases (oat, soy, almond and coconut), the cheapest segment was private-label soy-based beverages. At £0.94/litre in 2025, they were just 8% more expensive than private-label animal-based milk.

Average price per litre for selected plant-based and animal-based milk and drinks in UK supermarkets excluding discounters, by branded or private label, 2025 (£/l)



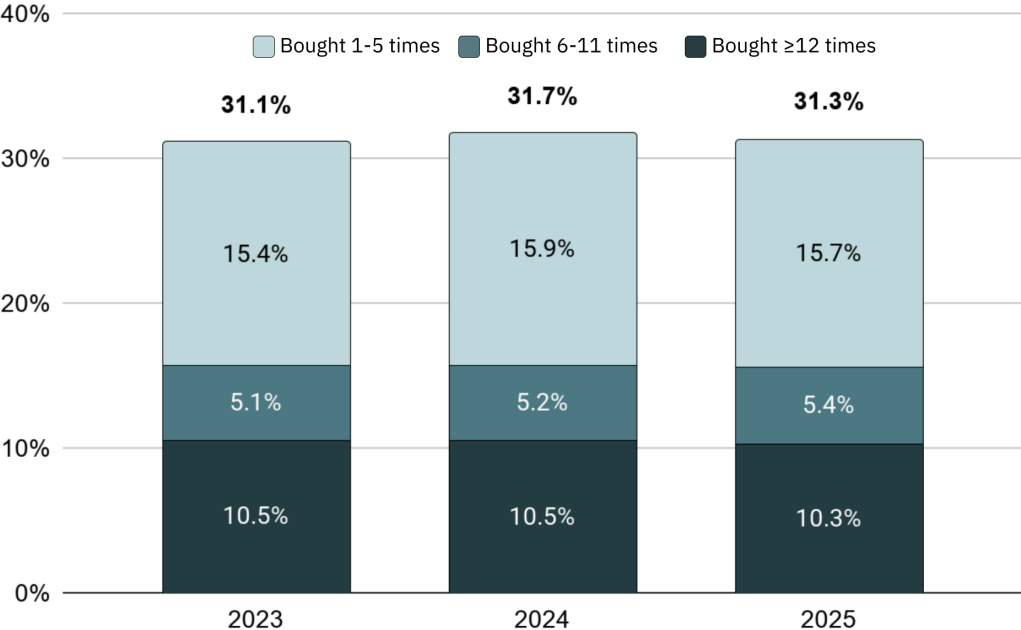
Household panel data

Household panel data from NIQ Homescan showed that the proportion of UK households that bought plant-based milk at least once per year peaked in 2024 at 31.7% before falling very slightly, to 31.3%, in 2025.

Similarly, the proportion of frequent purchasers – those buying an average of once per month or more often – fell very slightly to 10.3% in 2025.

These trends align with the slight fall in sales volume shown by the Circana dataset.

Annual household purchase patterns for plant-based milk in the UK, 2023-2025 (% 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”.

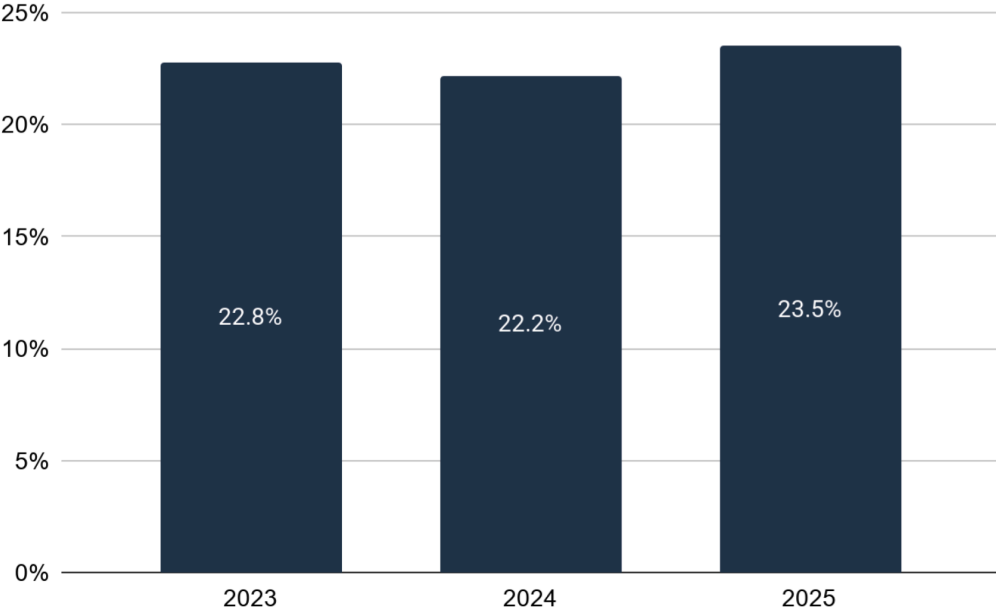
The Circana dataset does not cover sales from discounters such as Aldi and Lidl. However, the NIQ data shows that 23.5% of the sales value of plant-based milk came from discounter stores in 2025, up from 22.2% in 2024.

It is likely that the sector definitions used by NIQ and Circana differ, so the two datasets are not directly comparable. However, the significant market share of discounters in the NIQ data does show that the Circana dataset understates the UK's total retail market for plant-based milk and drinks.

Indeed, separate data from Worldpanel by Numerator, published by [The Grocer](#), suggests that the UK's total retail market for plant-based milk was £431 million in the year to June 2025 with a 3.2% year-on-year growth rate, and the market for other plant-based dairy alternative drinks was worth £29 million with a growth rate of 6.6%. This implies a total plant-based milk and drinks market worth £460 million in the year to June 2025, with year-on-year growth of 3.4%.

The difference between the Worldpanel by Numerator total and the totals from this report's Circana dataset (an increase of 0.5% to £419 million in the calendar year 2025, for supermarkets excluding discounters) could be explained by stronger growth in the discounter sector, which corresponds to the growth in discounter market share shown by NIQ.

Household purchase patterns for plant-based milk in the UK: proportion of sales value from discounter stores, 2023-2025 (%)



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".

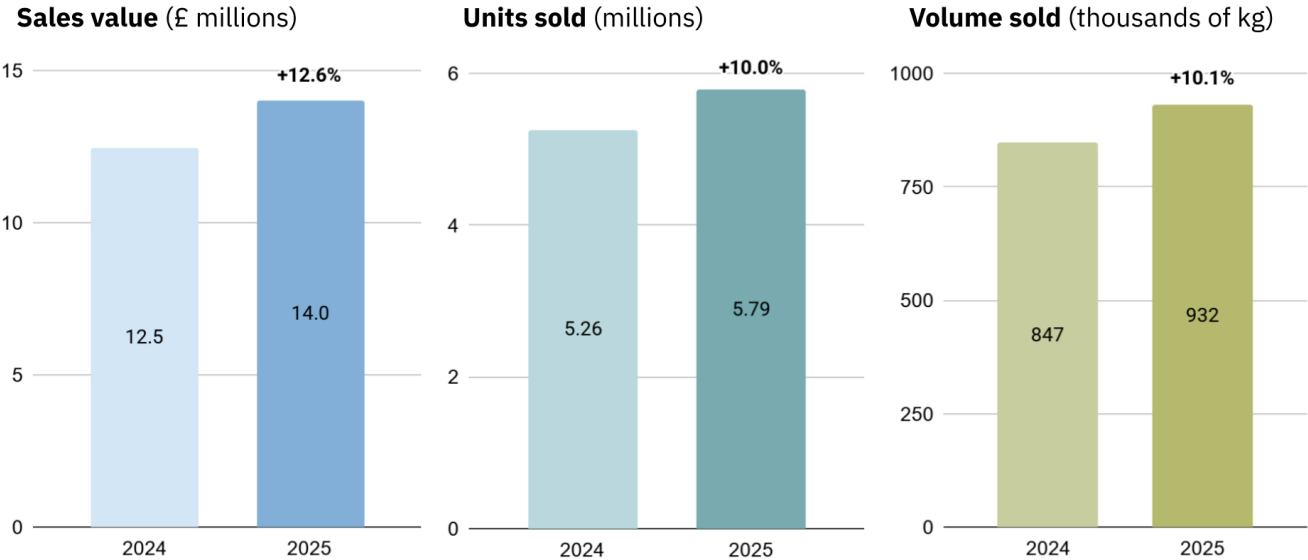
Plant-based cheese (soft and snacking)

Total market

Data was only available for a limited subset of plant-based cheese formats in the UK: soft cheese (including cream cheese and spreads), and snacking (multi-packs of small portions, and some slices). The totals reported here therefore do not represent the overall plant-based cheese market in the UK, which is led by [other formats](#) such as grated cheese and blocks.

Within the soft cheese and snacking segments, total annual sales value rose by 12.6% to £14.0 million in 2025. Unit sales rose by 10.0% to 5.79 million units, and sales volume rose by 10.1% to 932,000kg.

Plant-based cheese (soft and snacking) sales in UK supermarkets excluding discounters, 2024-2025

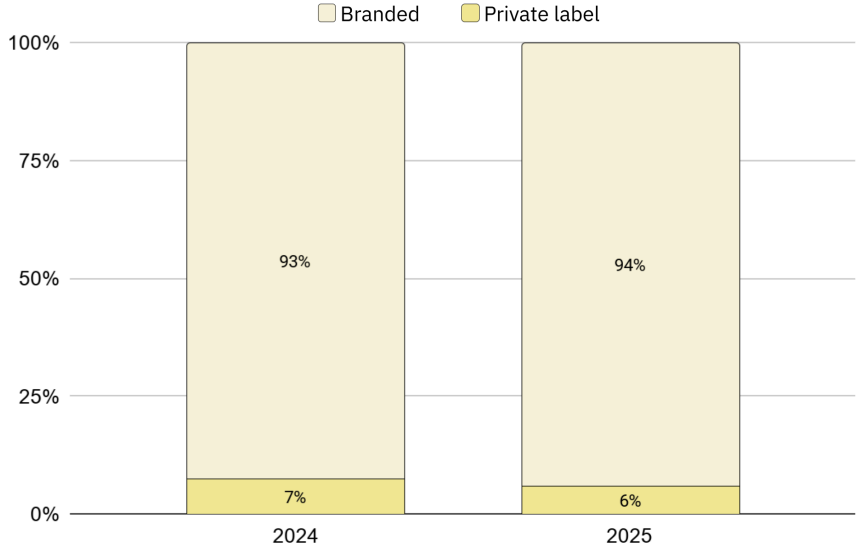


Branded versus private label

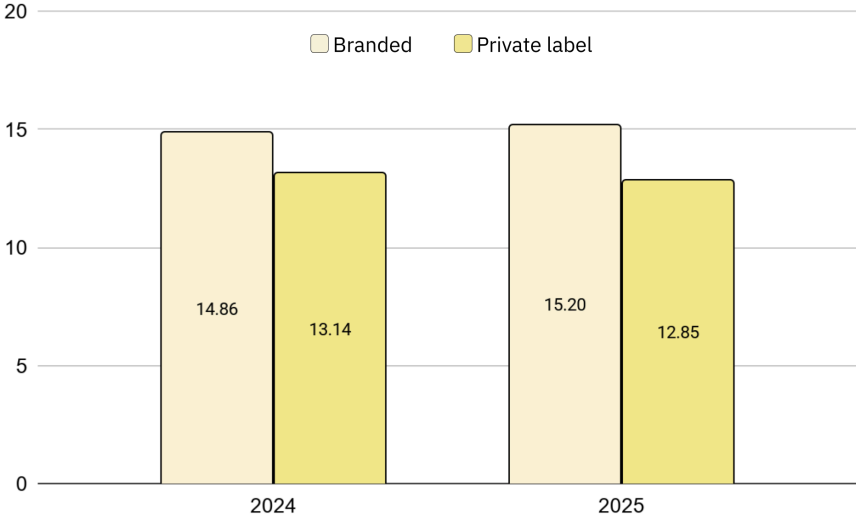
Within the limited dataset available, branded products made up the vast majority of sales volume.

Private-label products were 15% cheaper per kg than branded products in 2025, and had become cheaper since 2024. Branded products became more expensive in 2025.

Plant-based cheese sales (soft and snacking) in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (% of sales volume)



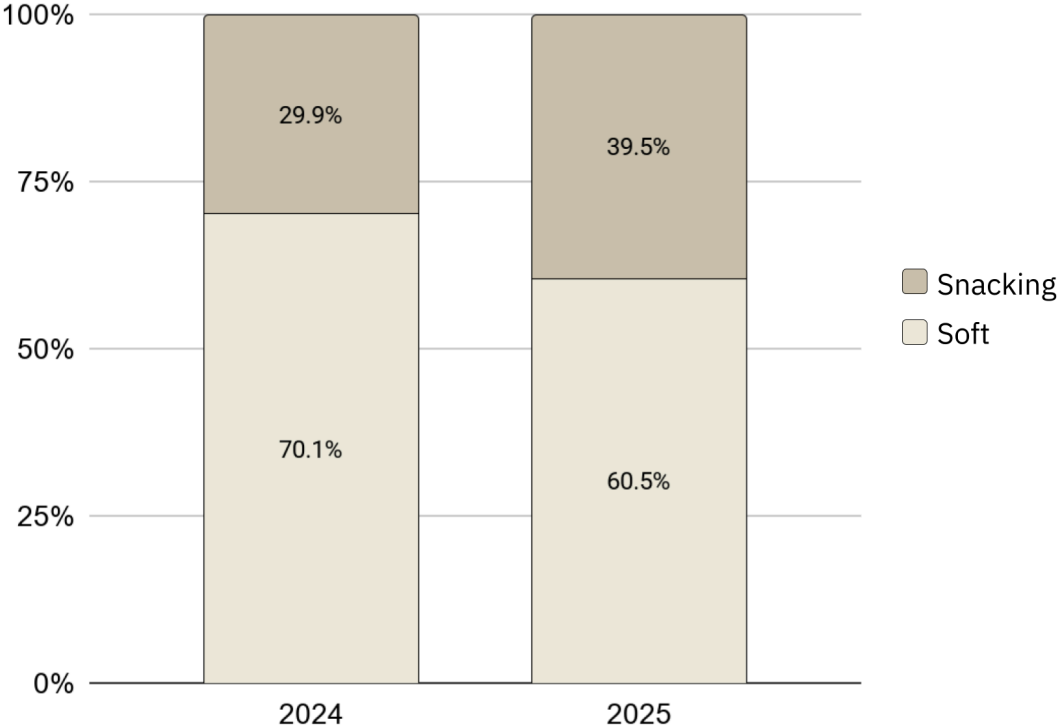
Average price per kg of plant-based cheese (soft and snacking) in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (£/kg)



Product format breakdown

The majority of sales volume in this limited dataset consisted of soft cheese products (cream cheese and spreads), which saw a 5% fall in absolute sales volume between 2024 and 2025. Snacking formats gained some market share in 2025, having grown by 46% in absolute sales volume.

Plant-based cheese sales (soft and snacking) in UK supermarkets excluding discounters, by type, 2024-2025 (% of sales volume)

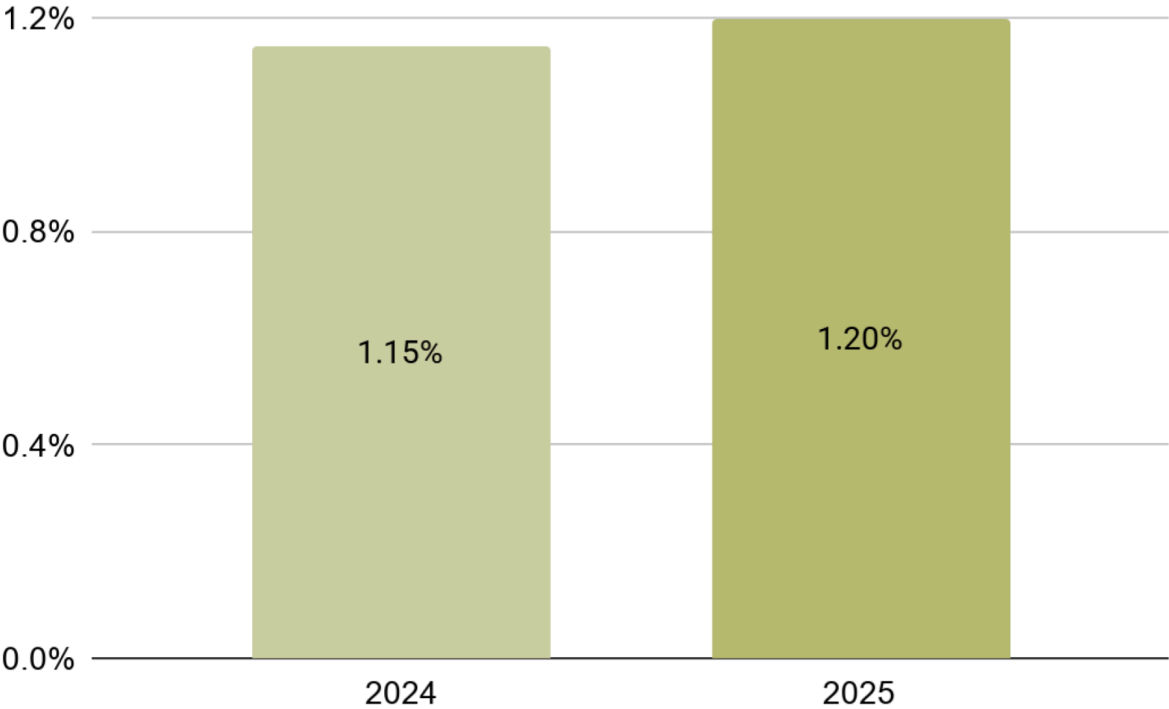


Market share

The market share of plant-based soft and snacking cheese, as a percentage of the sales volume of both plant- and animal-based soft and snacking cheeses, rose slightly from 1.15% in 2024 to 1.20% in 2025. The sales volume of animal-based options rose by 5% in 2025.

A study conducted by [NECTAR](#) in the United States found a large gap in the performance of plant-based and animal-based cheeses. They found 66%, 74%, and 78% of participants liked animal-based cheddar, cream cheese, and mozzarella, respectively, compared with just 40%, 33%, and 22% liking the plant-based equivalents. It is likely that similar performance gaps in the UK have contributed to the small market share of plant-based cheese.

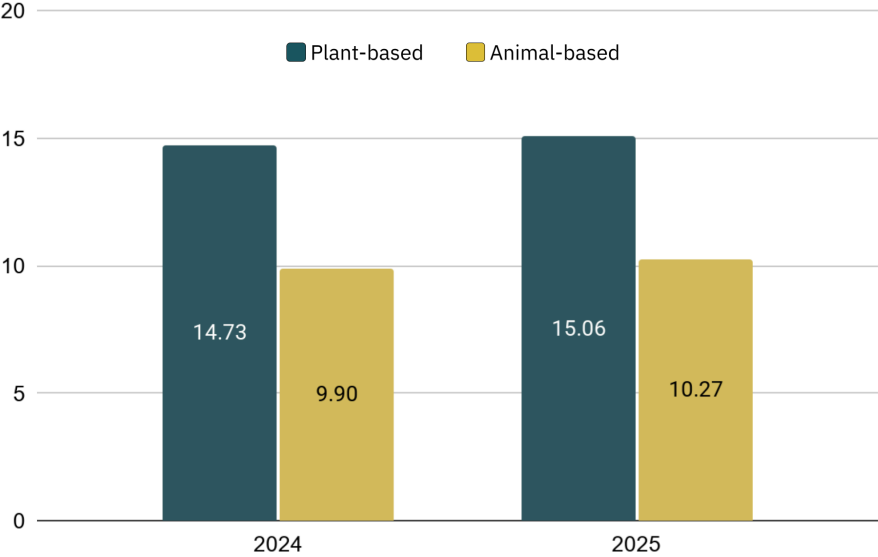
Plant-based cheese: share of total (plant- and animal-based) soft and snacking cheese sales in UK supermarkets excluding discounters, 2024-2025 (% of sales volume)



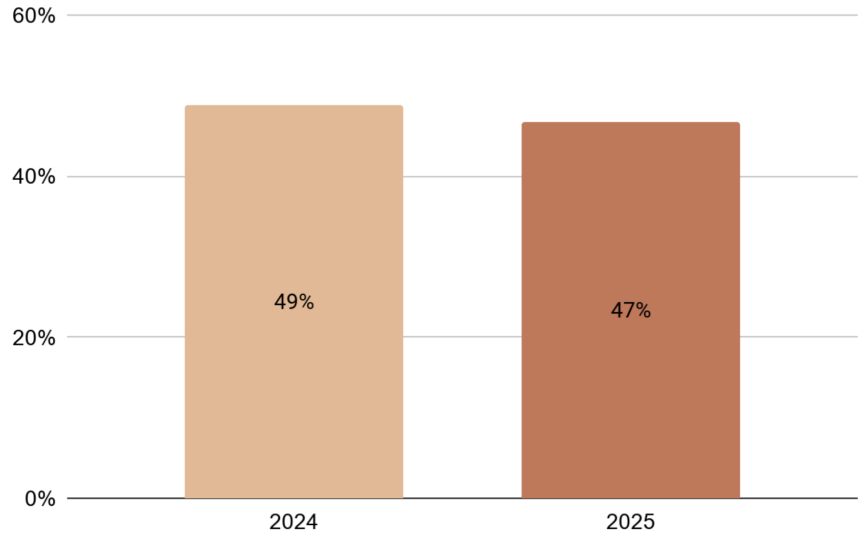
Price trends relative to animal equivalent

Within the soft and snacking cheese segments, plant-based products carried a significant price premium, costing 47% more per kg than animal-based products in 2025.

Average price per kg for plant-based and animal-based cheese (soft and snacking) in UK supermarkets excluding discounters, 2024-2025 (£/kg)



Price difference for plant-based compared with animal-based cheese (soft and snacking) in UK supermarkets excluding discounters, 2024-2025 (% difference based on £/kg)



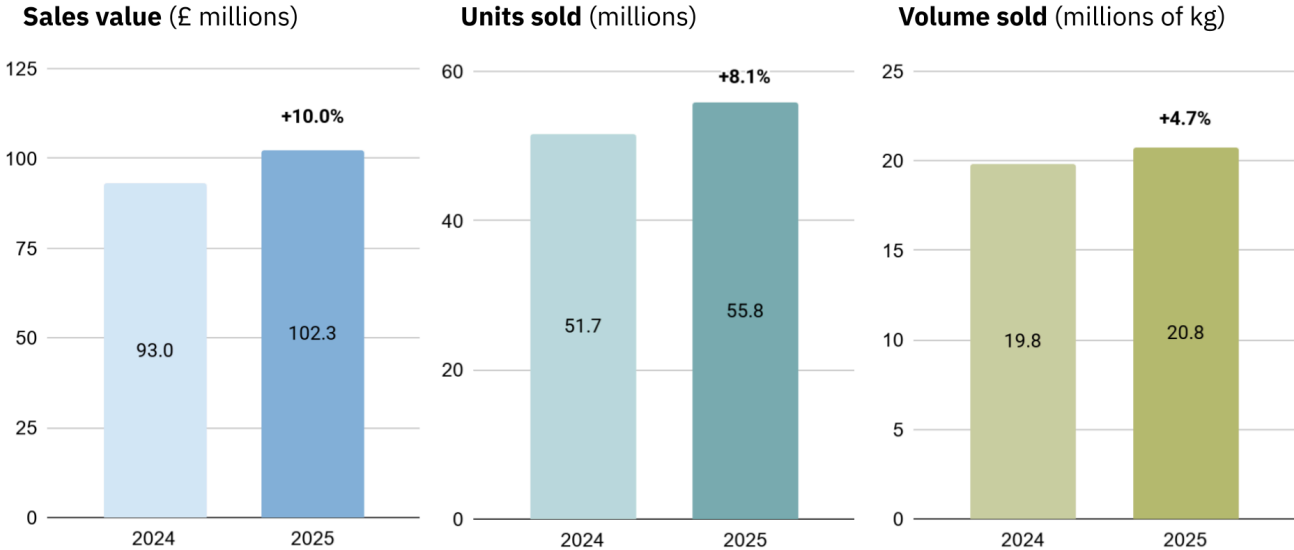
Plant-based yoghurt

Total market

The UK market for plant-based yoghurt grew in 2025. Annual sales value rose by 10.0% to £102.3 million, unit sales rose by 8.1% to 55.8 million, and sales volume rose by 4.7% to 20.8 million kg.

The greater rise in sales value compared with sales volume indicates rising prices per kg over time. Similarly, the higher increase in unit sales compared with sales volume indicates that the size of the average unit of yoghurt fell.

Plant-based yoghurt sales in UK supermarkets excluding discounters, 2024-2025



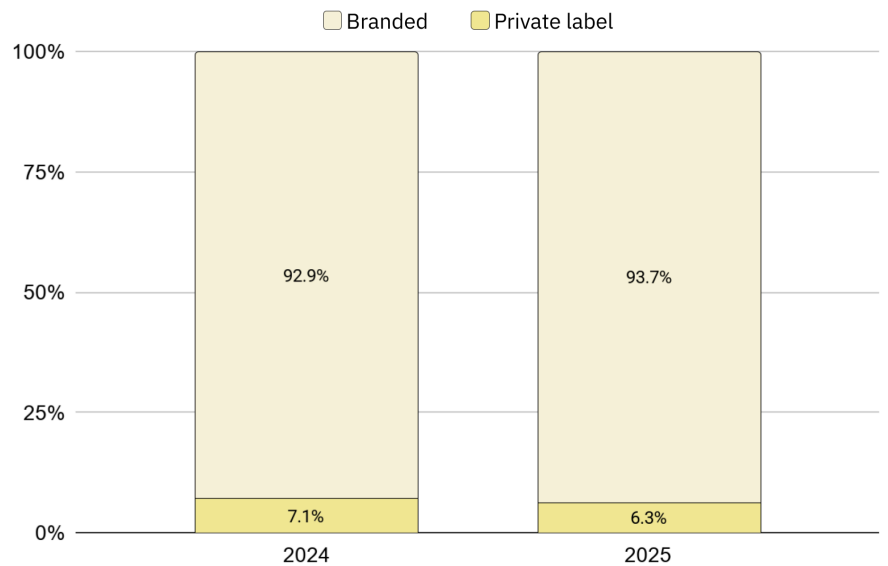
Branded versus private label

Private-label products made up a small proportion of the market for plant-based yoghurt, at 6.3% of sales volume in 2025, down slightly from the previous year.

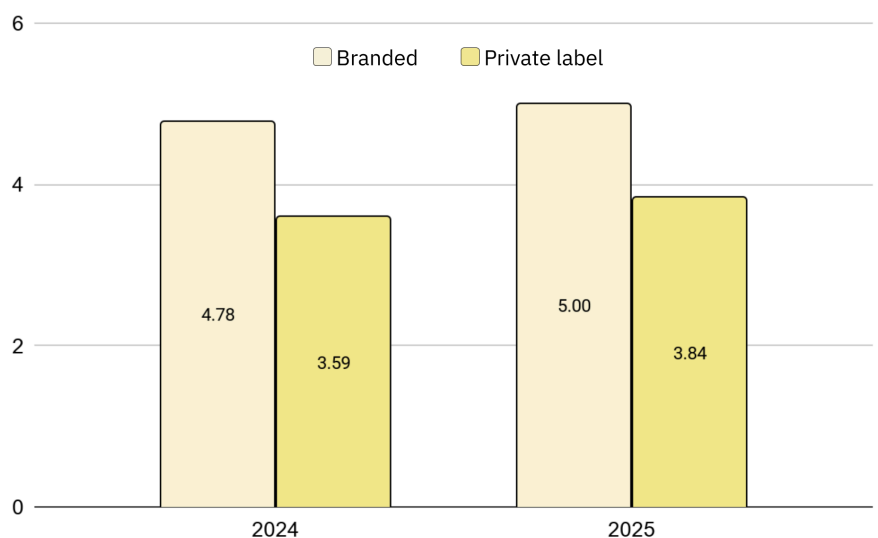
Private-label products had a price advantage over branded products, at 23% cheaper per kg in 2025. However, this price advantage was less pronounced than in other categories such as plant-based milk and drinks, perhaps explaining their low share of sales. The limited availability of private-label plant-based yoghurts, compared with categories such as plant-based milk and drinks, may also explain the low share.

Furthermore, plant-based yoghurt is a category where good taste performance is difficult to achieve: a [NECTAR sensory study](#) found that only 26% of participants in the United States liked plant-based yoghurt, on average across several products, whereas 49% liked the dairy yoghurt benchmark. With a relatively low price premium for branded products, consumers may therefore be drawn towards branded products if they perceive them as offering a better eating experience.

Plant-based yoghurt sales in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (% of sales volume)



Average price per kg of plant-based yoghurt in UK supermarkets excluding discounters, by branded or private label, 2024-2025 (£/kg)

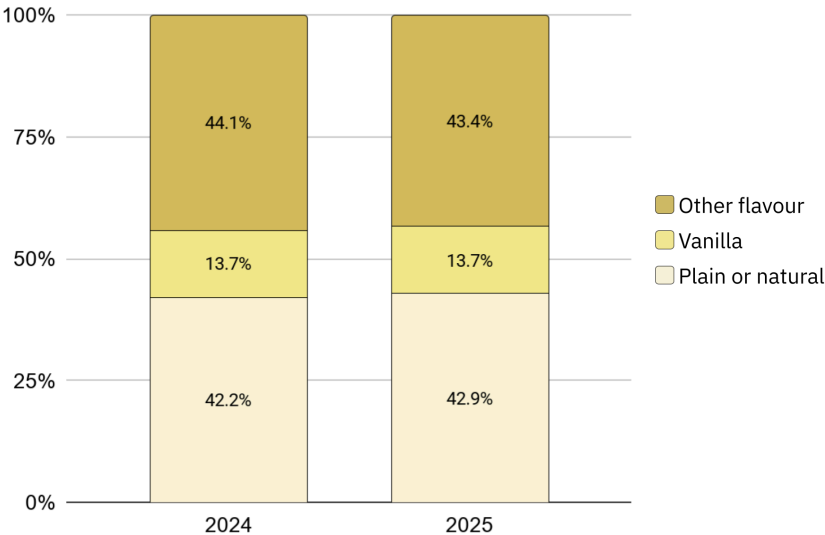


Product format breakdown

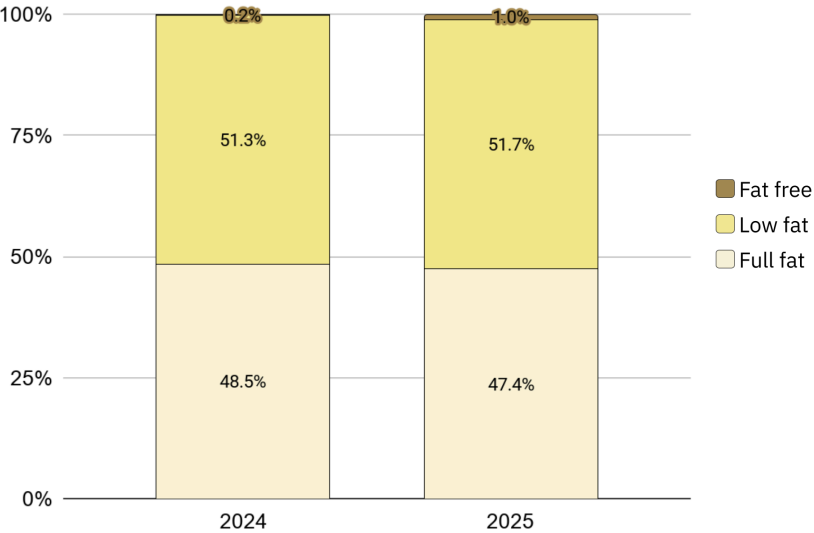
Plain/natural and vanilla-flavoured options made up more than half of plant-based yoghurt sales volume in 2025, with little change from 2024.

Low-fat and fat-free products accounted for just over half of sales volume.

Plant-based yoghurt sales in UK supermarkets excluding discounters, by flavour, 2024-2025 (% of sales volume)



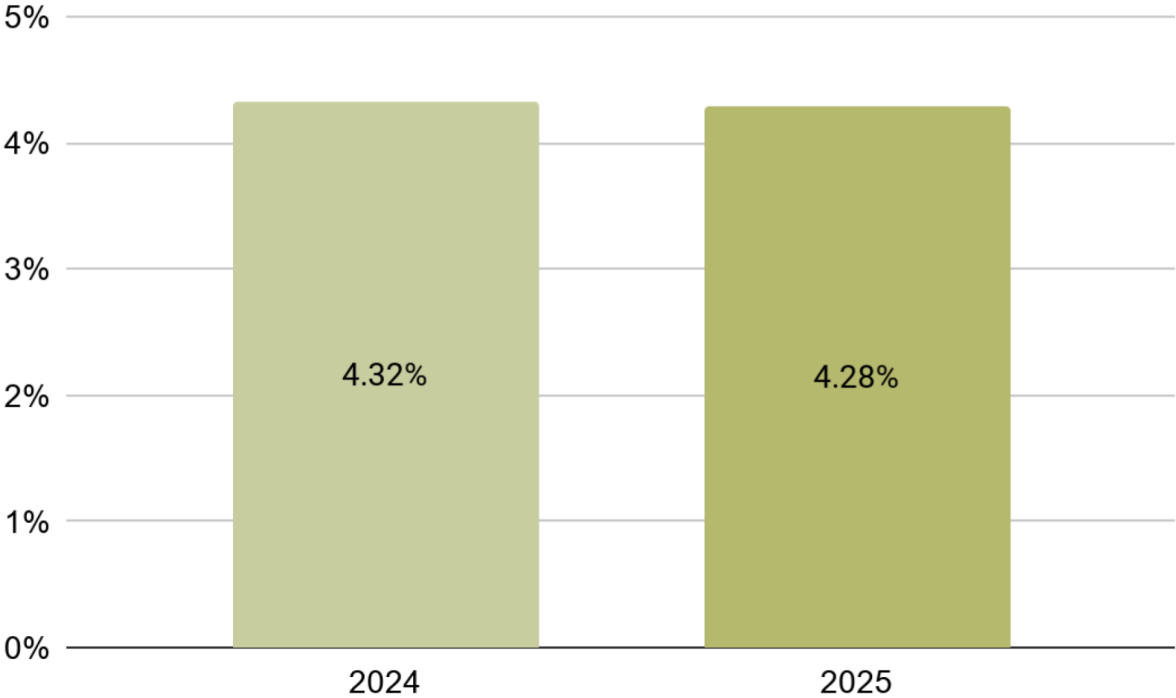
Plant-based yoghurt sales in UK supermarkets excluding discounters, by fat content, 2024-2025 (% of sales volume)



Market share

Despite its rising sales volume, the market share of plant-based yoghurt, as a percentage of total plant- and animal-based yoghurt sales volume, fell slightly. This is because animal-based yoghurt sales rose by 6% in 2025, possibly driven by strong consumer [interest](#) in gut health and protein.

Plant-based yoghurt: share of total (plant- and animal-based) yoghurt sales in UK supermarkets excluding discounters, 2024-2025 (% of sales volume)



Price trends relative to animal equivalent

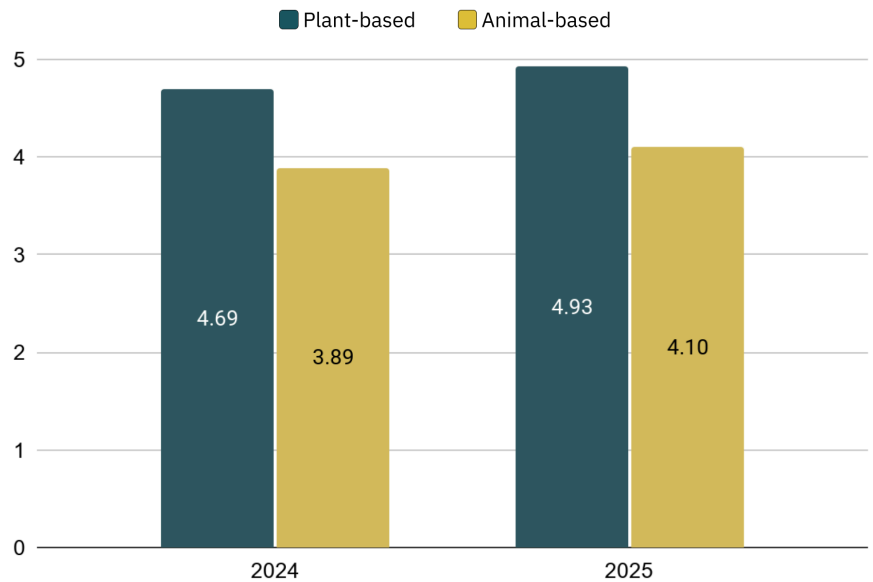
Both plant- and animal-based yoghurt grew more expensive per kg in 2025.

The price premium of plant-based yoghurt remained roughly steady, at around one-fifth more expensive per kg.

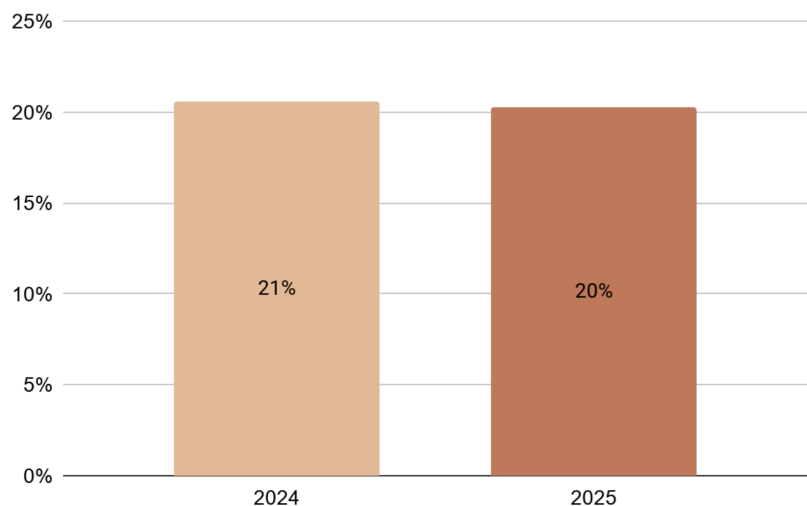
The price gap was more pronounced in the private-label sector, where plant-based yoghurt cost 39% more per kg than private-label animal-based yoghurt in 2025.

In contrast, when comparing only branded products, plant-based yoghurt was 7% more expensive per kg in 2025.

Average price per kg for plant-based and animal-based yoghurt in UK supermarkets excluding discounters, 2024-2025 (£/kg)



Price difference for plant-based yoghurt compared with animal-based yoghurt in UK supermarkets excluding discounters, 2024-2025 (% difference based on £/kg)



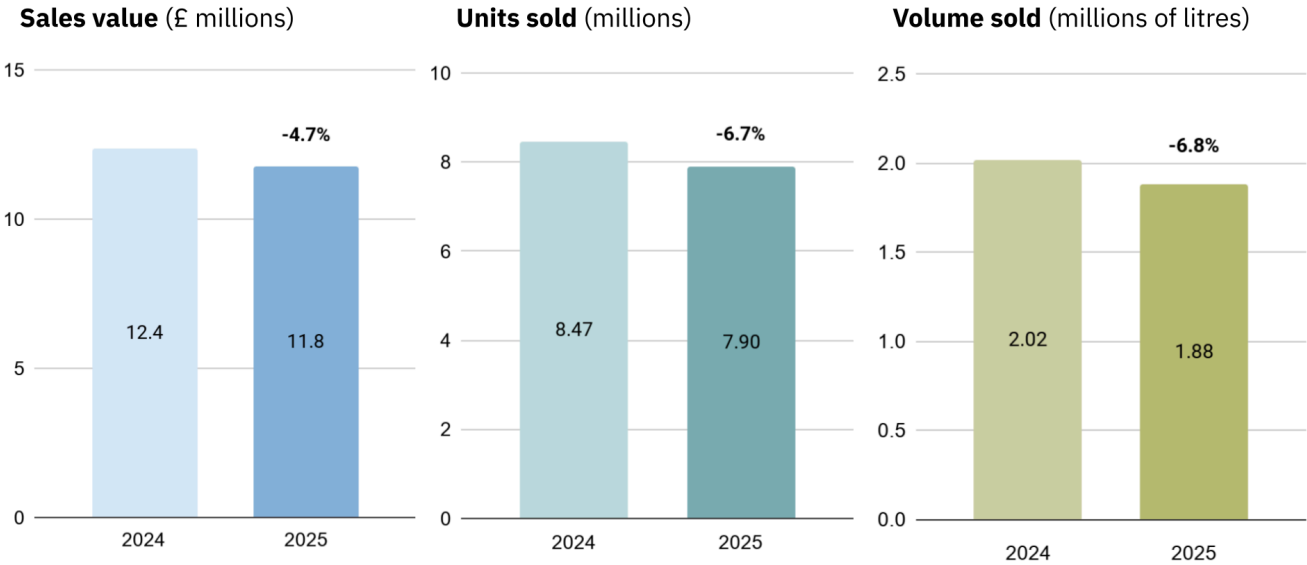
Plant-based chilled cream

Total market

Sales of plant-based chilled cream⁸ in the UK fell in 2025.

Annual sales value fell by 4.7% to £11.8 million in 2025. Unit sales fell by 6.7% to 7.90 million, and sales volume fell by 6.8% to 1.88 million litres.

Plant-based chilled cream sales in UK supermarkets excluding discounters, 2024-2025



⁸ Data was not available for ambient products, but some shelf-stable plant-based cream products are available in the UK. Note also that no private-label plant-based cream products could be identified in the dataset, suggesting that UK retailers have not yet entered this space.

Product format breakdown

The most common ingredient bases for plant-based chilled cream were lentil and oat, each accounting for just over a third of sales volume in 2025.

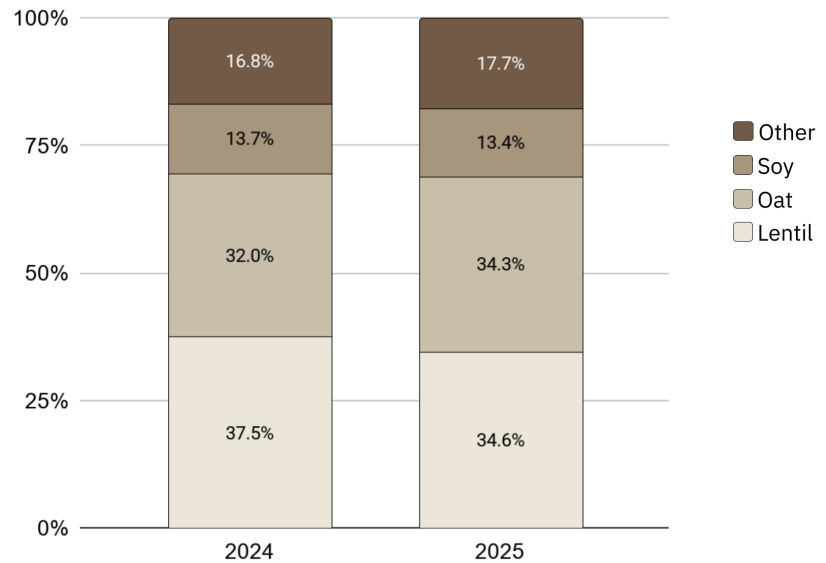
The cheapest segment was soy cream, at £4.84/litre in 2025. Oat and lentil were more expensive, at £5.38/litre and £5.94/litre respectively.

The absolute sales volume of oat cream remained steady in 2025, while that of the remaining segments fell.

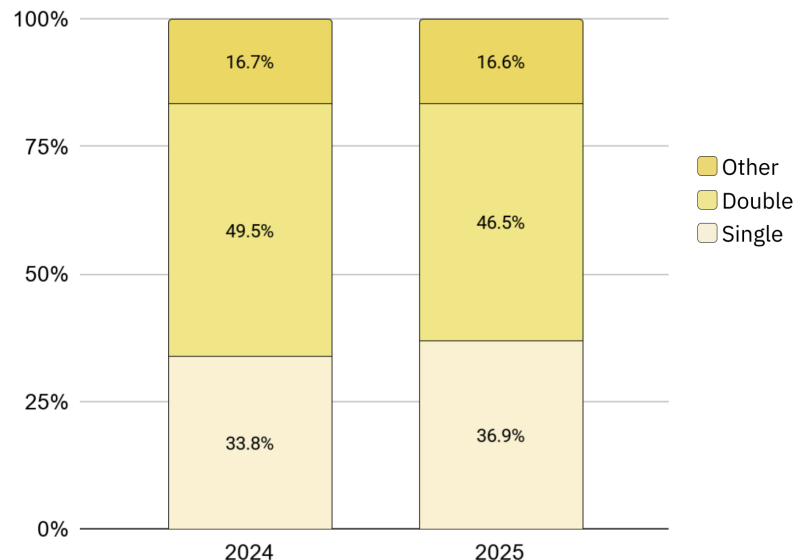
Double cream options had the largest share of sales in 2025, at 46.5% of sales volume. Single cream products saw growth in both share of sales and absolute sales volume, possibly driven by their lower price point (£4.81/litre compared with £6.10/litre for double cream).

Other types (including spray cream and crème fraîche) retained a steady share of sales but saw a decline in absolute sales volume.

Plant-based chilled cream sales in UK supermarkets excluding discounters, by ingredient base, 2024-2025 (% of sales volume)



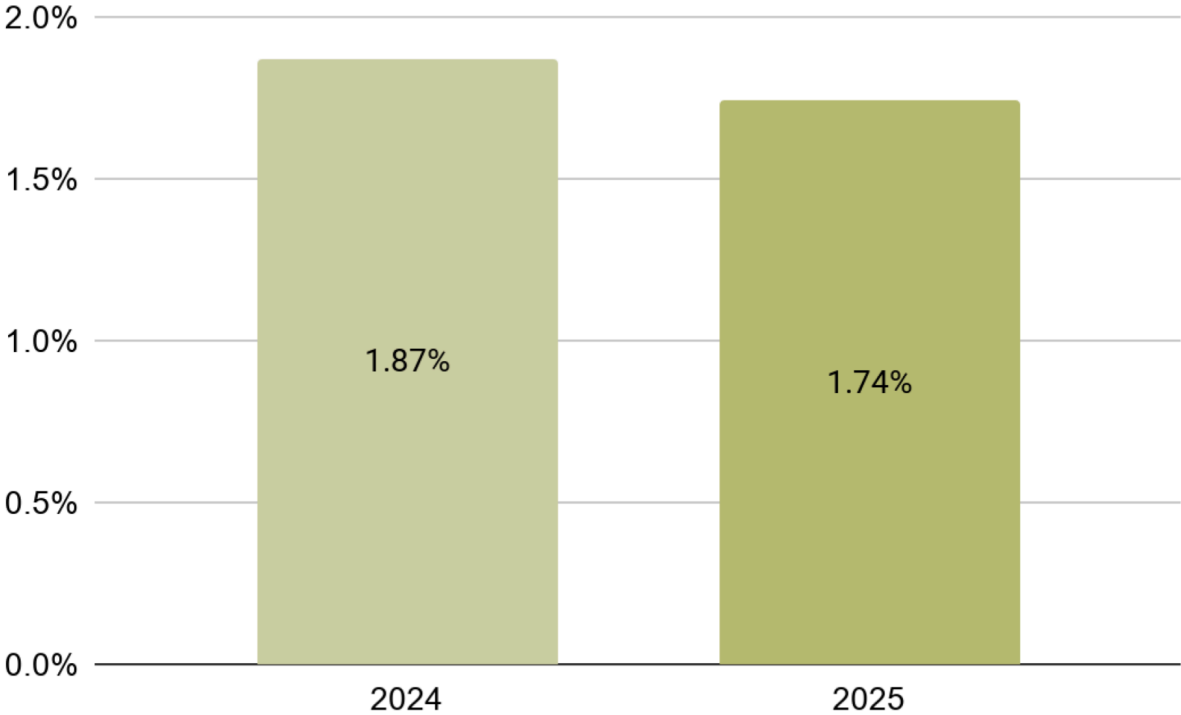
Plant-based chilled cream sales in UK supermarkets excluding discounters, by type, 2024-2025 (% of sales volume)



Market share

The market share⁹ of plant-based chilled cream, as a percentage of the overall sales volume of plant- and animal-based chilled cream, fell to 1.74% of sales volume in 2025. The sales volume of animal-based chilled cream remained steady during this time despite a steeper increase in average price compared with plant-based products.

Plant-based chilled cream: share of total (plant- and animal-based) chilled cream sales in UK supermarkets excluding discounters, 2024-2025 (% of sales volume)



⁹ Note that the market share shown here is lower than that provided in the previous edition of this report. This appears to be due to improved coverage of private-label dairy cream in the Circana dataset.

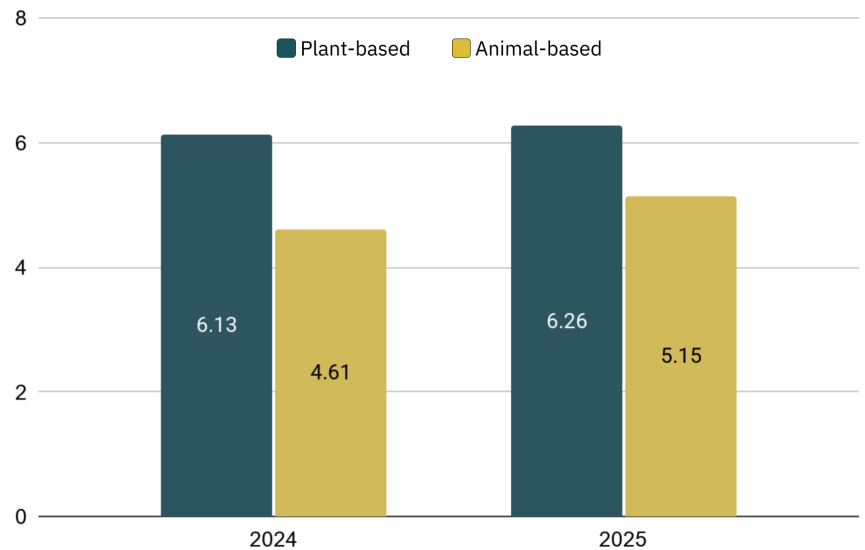
Price trends relative to animal equivalent

Both plant- and animal-based chilled cream rose in price between 2024 and 2025.

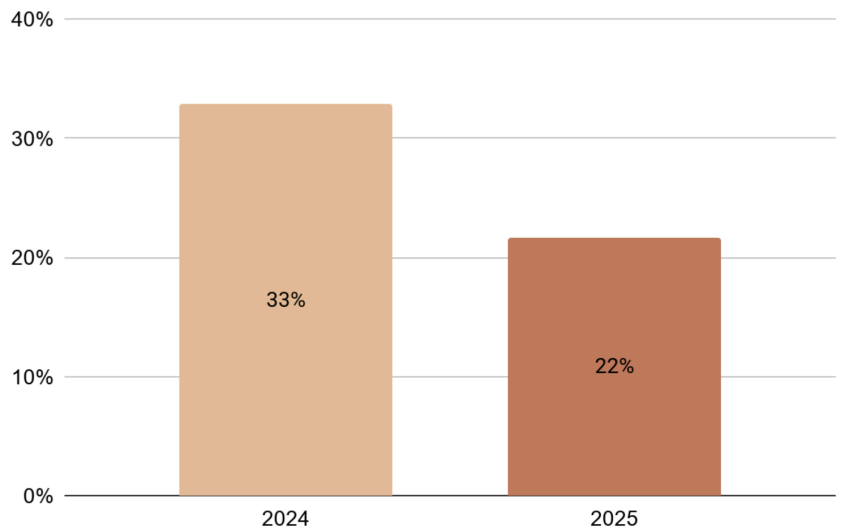
As the price increase was steeper for animal-based cream (+12%) than for plant-based (+2%), the price gap fell over time. In 2025, plant-based chilled cream was 22% more expensive per litre.

However, the cheapest plant-based segments can compete on price. For example, soy-based cream cost £4.84/litre in 2025 – cheaper than the average for dairy cream (£5.15/litre) and on par with private-label dairy cream (£4.81/litre).

Average price per litre for plant-based and animal-based chilled cream in UK supermarkets excluding discounters, 2024-2025 (£/l)



Price difference for plant-based compared with animal-based chilled cream in UK supermarkets excluding discounters, 2024-2025 (% difference based on £/l)



Closing remarks

The UK's plant-based market continues to experience challenges, driven mostly by falling demand for plant-based meat. However, there are indications that more sales of plant-based meat and milk are shifting towards discounters, suggesting that the overall picture may be less negative than suggested by the sales trends presented here.



There is rapid growth in tofu, tempeh and seitan, suggesting that some consumers might be switching to more affordable products that they see as being less processed. However, sales of plant-based meat remain several times higher than tofu, tempeh and seitan, indicating that products with a meaty taste, texture or cooking experience have broader appeal.

Plant-based milk sales contracted slightly, but the considerable price premium compared with dairy milk may be inhibiting further growth, in comparison to other mature markets such as Germany, where plant-based milk and drinks are more affordable and continue to grow. The success of relatively expensive barista milk, however, indicates that product performance remains key.

The rising proportion of sales of plant-based meat and milk from discounter stores suggests that, for many consumers, price remains an important consideration.

To enable UK consumers to act on their [intentions](#) to eat more plants and less meat and dairy, the plant-based industry and retailers must continue to invest in improving the taste and price of their plant-based ranges.

Helen Breewood,

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

As the cost of living rises sharply amid the conflict in the Middle East and the effects of climate change push up the price of animal-based foods, the urgency of shifting to a more resilient food system has never been clearer. Improving the availability, affordability and quality of plant-based foods – including plant-based meat and dairy – is essential to delivering a more diverse protein supply and a healthier UK population.



The UK Government recently [recognised](#) alternative proteins as a “major opportunity” for its *Good Food Cycle*, helping to contribute to economic growth, sustainable food production and improving public health. [Measures](#) including a mandatory ‘protein split’ target and revising the UK’s national dietary guidelines would send a powerful signal to the food industry that the government has a long-term vision to unlock the benefits of plant-based foods.

Linus Pardoe,

Senior UK Programme Manager at the Good Food Institute Europe

About the Good Food Institute Europe

[The Good Food Institute Europe](#) is a nonprofit 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.

Citation

Breewood H., UK plant-based food retail market insights 2024-2025 (2026). *GFI Europe*. DOI: 10.5281/zenodo.20512877.

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