

# United Kingdom



Second-largest economy within Europe and sixth-largest globally.

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Population

**69**  
million

Average age

**40**  
years

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Value of retail market for  
plant-based foods in 2024  
across categories

**£898**  
million

Plant-based  
meat sales  
values in 2024

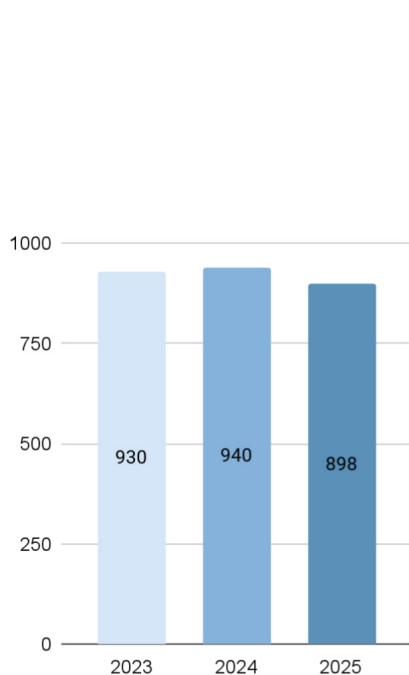
**£33**  
million

## 01 Market size

### Retail

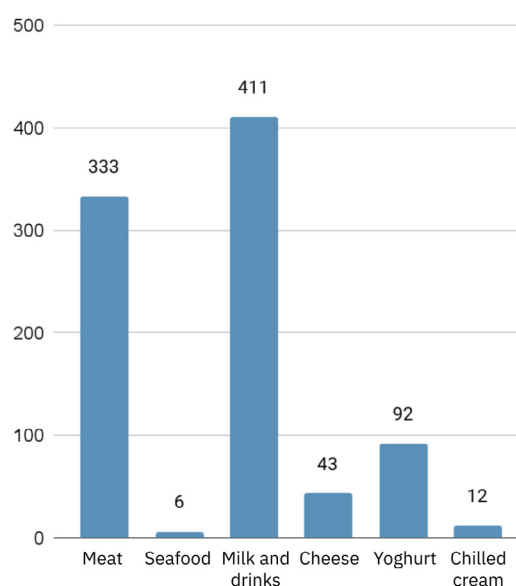
- The UK retail market for plant-based foods across six categories (meat, seafood, milk and drinks, cheese, yoghurt, and chilled cream) was valued at £898 million in 2024. Sales value has dropped by 4.1% in 2024 over 2023.
- Of this, plant-based meat accounted for 37% of plant-based sales value with a sale of £33 million in 2024. This is a decrease of 9.7% compared to the previous year and of 15.1% compared to two years prior.
- Private-label plant-based meat products account for only a small proportion of overall sales value, at around 13%.

Plant-based food sales value in £ millions



Sales report was based on three 52-week periods ending in late January each year, rather than the calendar years.

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



## 02 Consumer profile and demand

- [1.8% of Brits identify as vegan, 5.4% vegetarian, 2.2% pescetarian and 31.2% flexitarians.](#)
- In 2024, 31.6% of British households bought plant-based meat alternatives, with 13% purchasing plant-based meat six or more times in the year.
- [GFI Europe's consumer study](#) in

collaboration with HarrisX found that 38% of UK consumers want to eat more plant-based foods, and 33% want to eat less animal meat and dairy. 20% want to reduce consumption of both meat and dairy.

### Household purchase patterns for plant-based meat 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%

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."

## 03 Product formats in the market

Contribution to [sales volume](#) of plant-based meat in 2024

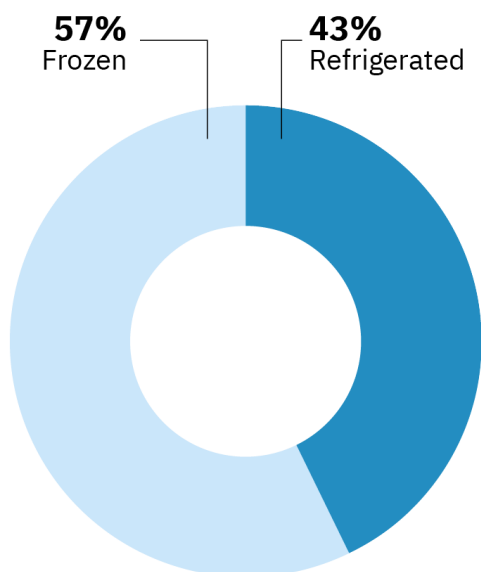
### By protein type

- Beef : **28%** of sales
- Chicken: **31%** of sales
- Pork/Ham : **37%** of sales

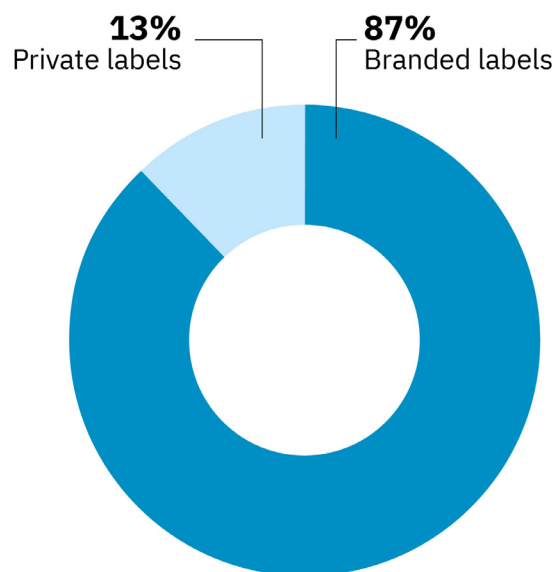
### By format (as a percentage of the overall sales volume of plant-based meat):

- Sausages: Comprised **22%** of sales
- Ingredients: Products intended for incorporation into other dishes, including pieces and mince, made up **23%** of sales
- Center plate (breaded/coated): **12%** of sales
- Burgers: **11%** of sales

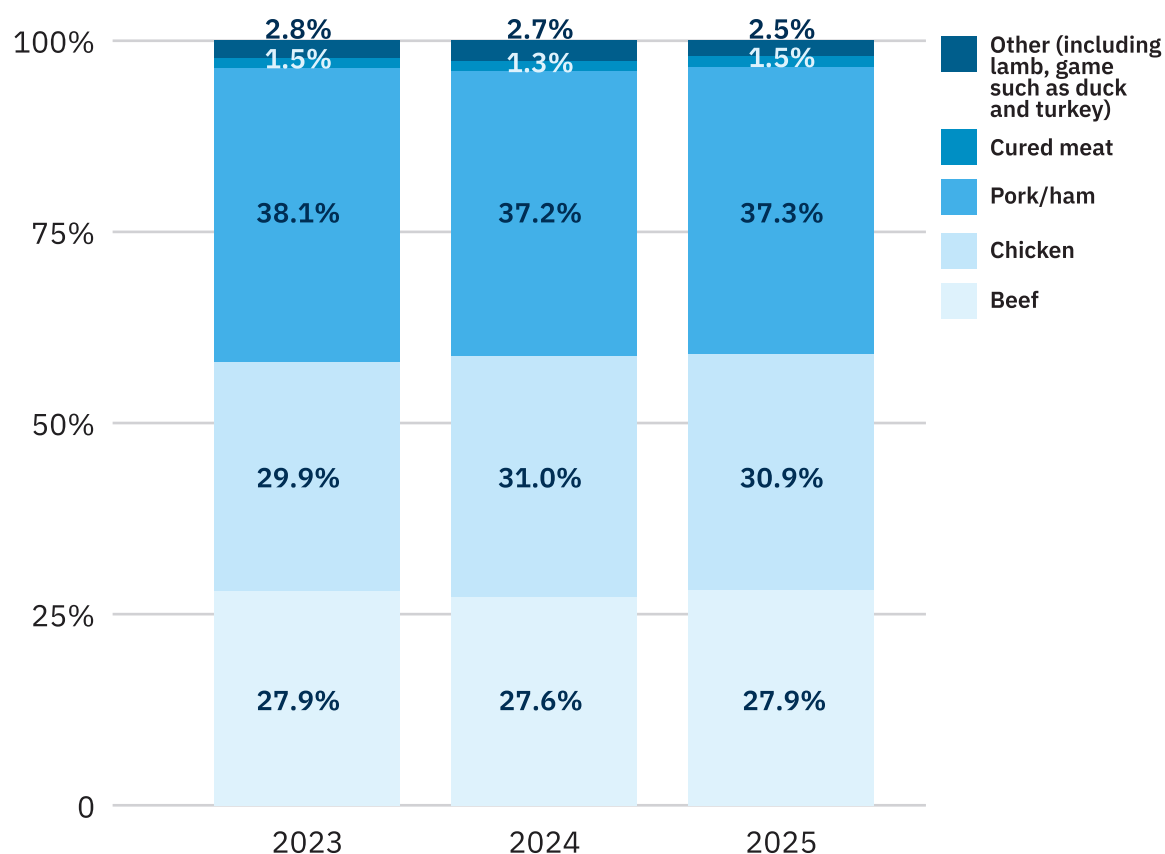
### By storage condition



### Branded vs private labels (on the basis of sales volume of plant-based meat)

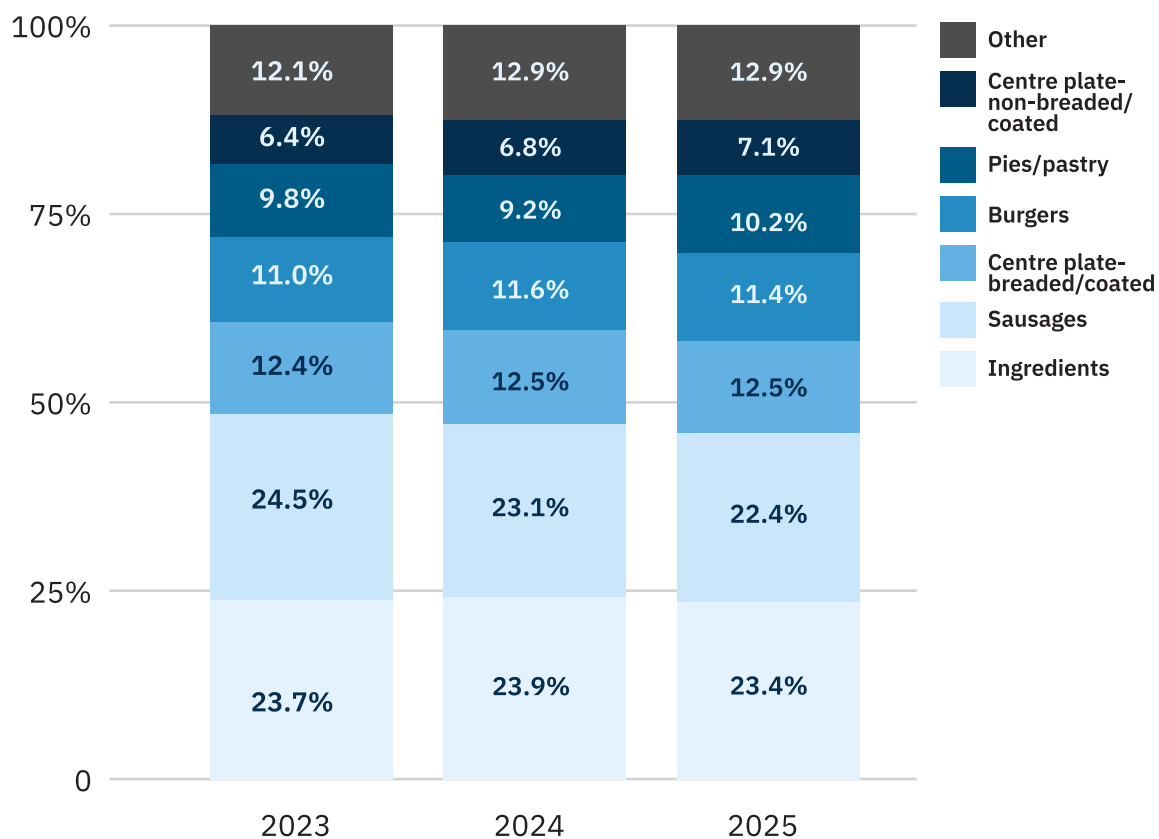


### UK plant-based meat sales by type, 2023-2025 (% of sales volume)



Sales report was based on three 52-week periods ending in late January each year, rather than the calendar years.

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



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### 04 Key players in the market

- Some of the popular brands include **Meatless Farms, Cauldron, Garden**

**Gourmet, Amy's Kitchen, Impossible Foods, and Morning Star.**

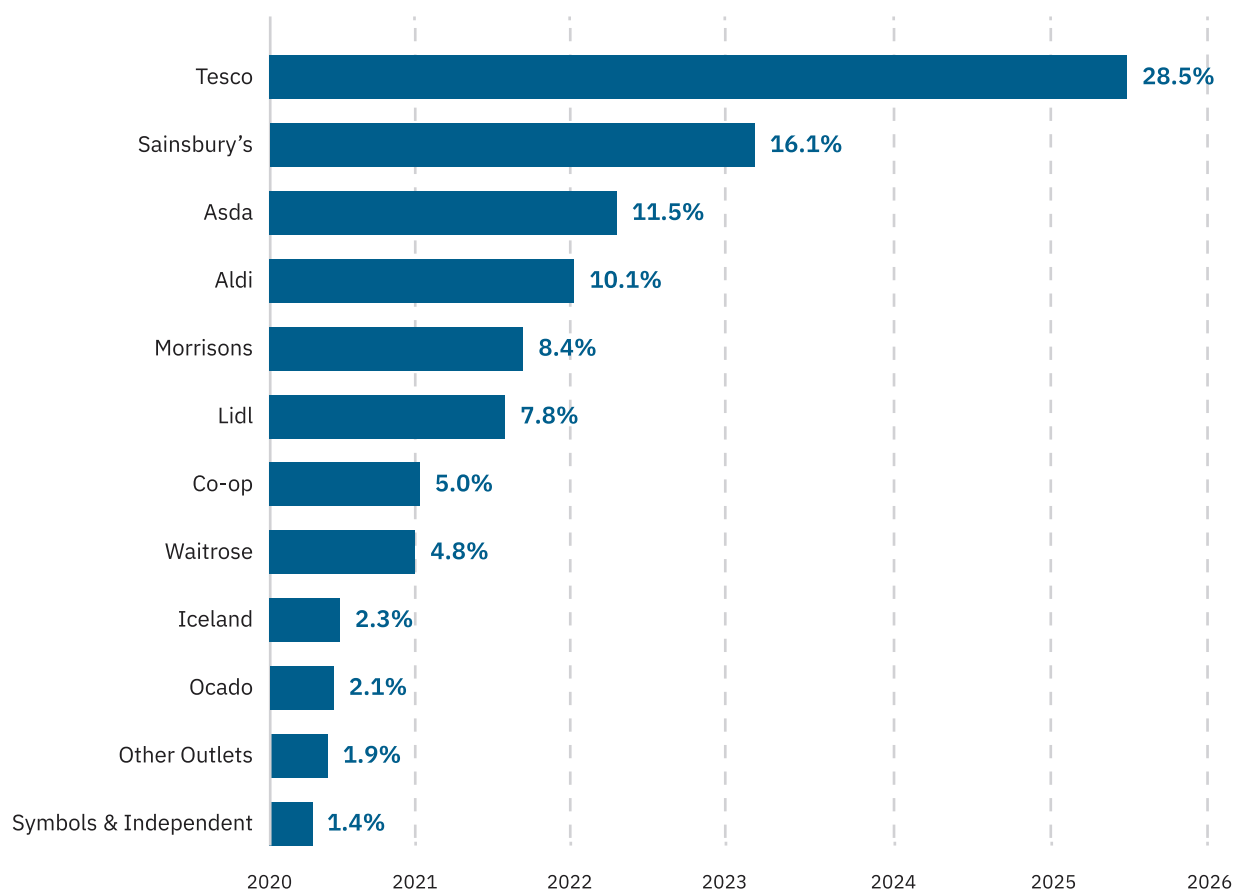
## 05 Key channels

### Retail

There are more than 87,000 grocery stores in the UK.

- Key distribution channels within the UK food and grocery retail market include hypermarkets, supermarkets, hard discounters (retail businesses that offer a limited selection of products, primarily private-label brands, at significantly lower prices than traditional discount retailers), convenience stores, gas stations, and speciality food and beverage (F&B) retailers. Hypermarkets, supermarkets, and hard discounters hold a dominant position.
- The leading players in the UK food and grocery retailing market are **Tesco**, **Sainsbury's**, **ASDA**, **Aldi**, **Morrisons**, **Lidl**, **Co-op**, **Marks & Spencer**, **Waitrose & Partners**, and **Iceland**, among others.

### Grocery Market Share (12 weeks ending)



## Food service industry

- The UK food and beverage service industry is highly fragmented, with [over 362,679 diverse outlets](#). These include restaurants, mobile food services (including takeaway shops and food stands), pubs, bars, clubs, event catering, and other food service activities. Hotels, pubs, and restaurants account for 1/3rd of these outlets.
- Some of the key [food service companies](#) in the UK are **Greene King**, **Stonegate Group**, **JW Wetherspoon**, and **Fortress Investment Group**.

## 06 Key brand tie-ups

### ► Nov 2018 to Sept 2022



**Beyond Meat**, has established retail partnerships with major UK supermarkets, including **Tesco**, **Sainsbury's**, **Asda**, **Ocado**, **Waitrose**, and **Morrisons**. Beyond Meat has partnered with **Tortilla** and **McDonald's** in the food service industry.

### ► May 2022



**Impossible™** products have been introduced at over 250 **Hungry Horse** public houses owned by **Greene King**, a prominent UK pub and brewing company.

### ► July 2023



**BVeg Foods**, a leading plant-based meat manufacturer from India, exports frozen vegan beef chunks to the UK.

## 07 Key distributors, manufacturers, and retailers



**Bidfood UK**, a leading food distributor in the UK, holds a dominant position in the food service industry with annual sales exceeding £1.3 billion. Headquartered in London, they provide services to restaurants, healthcare and educational institutions, and hospitality establishments.



**Brakes Group**, a significant food service distributor operating within the UK, has an annual turnover surpassing £3.5 billion. They serve a clientele comprising independent and multi-unit restaurants, healthcare and hospitality entities, and various other food service businesses. With a focus on sustainability practices and the provision of high-quality private-label products, Brakes Group is well-positioned for placing alternative proteins across the British market.



**Bestway Wholesale's** extensive customer base ranges from independent restaurants to national chains and specialises in delivering customised solutions tailored to specific client requirements. Bestway's client portfolio includes prominent establishments such as Subway, illustrating its capacity to accommodate large-scale distribution demands.

## BOOKER

**Booker Group** operates an extensive network of over 200 branches throughout the UK with a focus on providing supply chain solutions to convenience stores, catering services, and small businesses. Booker's collaborative association with Tesco demonstrates its capability to engage in partnerships with major retail chains.



**JJ Food Service** offers a comprehensive catalogue of over 30,000 products catering to restaurants, schools, and care homes.



**Castell Howell Foods** stands as a major distributor to restaurants, schools, and retailers situated in Wales and the South West region. The company is recognised for its dedication to local sourcing, sustainable practices, and the supply of high-quality products.

## 08 Regulatory overview

### Legislative authority / Regulatory body

Food Standards Agency (FSA) and the Food Standards Scotland (FSS) and the Department for Environment, Food & Rural Affairs (DEFRA)

The UK continues to implement changes to its border control measures following its departure from the EU. With England, Wales, and Scotland—Great Britain (GB)—outside of the EU single market and customs union, exporters should ensure they are familiar with the GB requirements that may differ from the EU in certain areas. Northern Ireland (NI) remains within the EU single market and customs union, and exporters should familiarise themselves with the specific requirements for trade with or via this part of the UK. DEFRA is the competent authority for agri-food trade.

### Food law

The General Food Law [Regulation 178/2002](#)

### Labelling regulation

[Food Information Regulations 2014](#) is the primary legislation for food labelling.

### Nutrition and health claim policy

[Retained Regulation \(EU\) No. 1169/2011](#) was incorporated into UK domestic law under the EU (Withdrawal) Act 2018 and sets out requirements for the provision of food information to consumers, including [the labelling of prepacked food and drink in the UK](#).

**Plant-based meat and dairy products**

Under the retained EU law, labelling, advertising and display of food shall not mislead consumers.

Some foods have ‘reserved descriptions,’ which you can only use if the food has a certain composition. For example, dairy terms—milk, cheese, butter, and yoghurt—are protected and must only refer to products derived from animals.

**Fermentation-derived and cultivated meat**

Cultivated meat and fermentation-derived proteins require pre-market authorisation by the FSA and FSS, with a decision to grant market access taken by the GB ministers. Most products are expected to be regulated as novel foods under assimilated [Regulation \(EU\) 2015/2283](#). Further information is available on the [FSA’s website](#).

**Import-export portal or services (if any)**

The UK’s enforcement system is based on the Home Authority Principle. Every UK business, including importers, can call on their local Trading Standards office for advice, guidance and information on consumer protection, trading standards, food safety, labelling and composition rules, and regulatory best seven practices. There are over 70 such regional [Trading Standards offices](#) located throughout the UK.

Exporters are advised to encourage their UK importer to liaise with their local Trading Standards office when introducing products to the UK market. The Home Authority Principle aims to provide advice and support to UK businesses to ‘get it right the first time.’ This local government provision is beneficial in seeking to resolve composition and labelling issues.

Food Safety Agency—[Import and Exports](#)

**Registration of business**

General advice on import procedures can be found here: [Import goods into the UK: step by step](#)

**Tariff benefits**

India benefits under the Developing Countries Trading Scheme (DCTS) where the concessional rate of tariff is 4.5%. For availing the benefits, the goods are required to meet the conditions specified under the Customs (Origin of Chargeable Goods: Developing Countries Trading Scheme) Regulations 2023, which in turn provides for 'important stage of manufacture condition.' Such conditions are to be proven by way of certificates or declarations from the notified agencies. India qualifies as a Least Developed Country (LDC) under the DCTS. The standard rate of tariff is 8%.

