

Attitudes towards Gluten-/Wheat-Free Food - UK - 2023

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This report looks at the following areas:

- Avoidance of gluten/wheat and the positive and negative perceptions of limiting gluten/wheat.
- Trends in launch activity within gluten-free foods.
- The impact of the rising cost of living on consumer habits in the market and sales.
- Opportunities for gluten-/wheat-free products during the income squeeze.
- Consumer behaviours and attitudes related to gluten-/wheat-free foods.
- Factors that would encourage buying of gluten-/wheat-free foods.

Collaborations between mainstream and specialist gluten-/wheat-free brands hold marked untapped potential, appealing to 62% of category buyers. For mainstream brands, extending into this space through a collaboration enables them to potentially gain new users amongst a group who may not normally be able to engage with them. Meanwhile, linking with a mainstream brand to tap into the awareness it enjoys in the wider retail market holds potential for specialist brands to widen their reach.

Cost is a notable barrier to limiting gluten/wheat, 30% of people viewing it as expensive, including 36% of category buyers. This reflects the reality of gluten-/wheat-free products often being noticeably higher priced than standard variants and will dampen interest particularly among those who do not need to avoid gluten or wheat for medical reasons.

Gluten-/wheat-free treats warrant shelf space and NPD even amidst the income squeeze as 51% of category buyers say they would prioritise these over essentials if money was tight. However, this also suggests that gluten-/wheat-free essentials such as bread are going to have to work even harder during this time to fend off competition from inherently gluten-free alternatives.

The premium gluten-/wheat-free space also holds strong potential even amid the income squeeze, with such products appealing to 53% of category buyers.



“The income squeeze is putting considerable pressure on the gluten-/wheat-free market, exacerbated by these products’ higher price than their standard equivalents’. Prioritisation of gluten-/wheat-free treats over essentials if money was tight and interest in brand collaborations point to opportunities to keep people engaged.”

– Alice Pilkington, Senior Food and Drink Analyst

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Attitudes towards Gluten-/Wheat-Free Food - UK - 2023

Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

This highlights how despite pressures on household incomes people are still prepared to pay more for the right product and points to opportunities for ongoing NPD in this area.



What's included

- Executive Summary
- Full Report PDF
- Infographic Overview
- Powerpoint Presentation
- Interactive Databook
- Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Table of Contents

OVERVIEW

- Key issues covered in this Report
- Products covered in this Report

EXECUTIVE SUMMARY

- **The five-year outlook for gluten-/wheat-free foods**
Figure 1: Category outlook, 2023-27
- **The market**
- **Inflation drives gluten-/wheat-free market's value growth in 2022**
- **Renewed competition from foodservice and focus on plant-based diets will chip away at market from 2025**
Figure 2: Market forecast for value sales of gluten-/wheat-free foods, 2017-27
- **Ingredient supply issues lead to rising prices and availability problems**
- **Companies and brands**
- **Warburtons credits success to continued innovation**
Figure 3: Leading brands' sales and shares in the UK gluten-free bread, cake, morning and baked goods retail market, by value, 2021 and 2022
- **Rebranding and range extensions are key themes in 2022 launch activity**
- **The consumer**
- **One in five avoid gluten, equal number avoid wheat; usage heavily skewed towards younger demographics**
Figure 4: Avoidance of gluten/wheat in the household, 2023
Figure 5: Usage of gluten-/wheat-free foods, by age, 2023
- **Three in 10 view limiting gluten/wheat as expensive, nearly one in five as good for digestive health**
Figure 6: Perceptions of limiting/reducing intake of gluten/wheat, by gluten/wheat avoidance in the household, 2023
- **Half of gluten-/wheat-free buyers would prioritise treats if money was tight**
Figure 7: Behaviours related to gluten-/wheat-free foods, by buyers and non-buyers, 2023
- **Significant opportunities exist for mainstream brand extensions and collaborations; sustainable credentials will be pertinent long term**
Figure 8: Factors that would encourage purchase of gluten-/wheat-free foods, by buyers and non-buyers, 2023

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Attitudes towards Gluten-/Wheat-Free Food - UK - 2023



Report Price: £2195 | \$2995 | €2600

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- **A quarter view gluten-/wheat-free products as too processed**
Figure 9: Attitudes towards gluten-/wheat-free foods, by buyers and non-buyers, 2023

ISSUES AND INSIGHTS

- **Gluten-/wheat-free treats will chime during income squeeze**
- **Interest in mainstream brand extensions and collaborations points to opportunities**
- **Strong sustainability credentials can win over new users in the long term**

MARKET SIZE AND PERFORMANCE

- **Inflation drives gluten-/wheat-free market's value growth in 2022**
Figure 10: UK retail value sales of gluten-/wheat-free foods, 2017-22

MARKET FORECAST

- **The five-year outlook for gluten-/wheat-free foods**
Figure 11: Category outlook, 2023-27
- **Income squeeze will hinder the market in 2023**
- **Renewed competition from foodservice and focus on plant-based diets will chip away at market from 2025**
Figure 12: Market forecast for value sales of gluten-/wheat-free foods, 2017-27
- **Learnings from the last income squeeze**
- **Forecast methodology**

MARKET DRIVERS

- **Inflation will continue to eat into consumer spending power over the course of 2023...**
- **...and despite government support, energy prices are still a major concern**
- **Rising interest rates mean that the pressure will move up to middle- and higher-income households**
- **High inflation and rising interest rates will compound the impact of the slowing recovery**
- **Consumer spending power will be curbed**
- **Unemployment is at a near-50-year low**
- **Consumers' financial wellbeing has fallen from the highs of 2021...**
Figure 13: Household financial wellbeing index, 2016-23

What's included

Executive Summary
Full Report PDF
Infographic Overview
Powerpoint Presentation
Interactive Databook
Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- ...and most people are feeling the effects of price rises
- Perception that gluten-/wheat-free foods are expensive will continue to prove barrier in short term
- Coeliac UK claims following a gluten-free diet is a fifth more expensive
- Ingredient supply issues lead to rising prices...
- ...and availability problems
- Drop in healthy eating intentions in 2022
- Lessened focus on healthy eating hits gluten-/wheat-free demand
- Sustainability predicted to be a higher priority in the long term
- Sustainable packaging and ingredients warrant attention in gluten-/wheat-free category

MARKET SHARE: BREAD AND SWEET BAKED GOODS

- **Segment growth underpinned by food inflation in 2022**
Figure 14: Leading brands' sales and shares in the UK gluten-free bread, cake, morning and baked goods retail market, by value and volume, 2020-22
- **Warburtons credits success to continued innovation**
- **Dr Schär, Genius and Juvela announce acquisitions**

LAUNCH ACTIVITY AND INNOVATION

- **Cakes, pastries and sweet goods grow share of gluten-free bakery launches in 2021/22**
Figure 15: Share of gluten-free food product launches in bakery, by sub-categories, 2018-22
- **More premium seasonal gluten-free baked goods**
Figure 16: Recent examples of seasonal gluten-free bakery launches, 2021-22
- **Lazy Day rebrands...**
Figure 17: Lazy Day rebranding, 2019 and 2022
- **...and so does Genius**
Figure 18: Genius rebranding and shift in focus, 2021 and 2022
Figure 19: Examples of Morrisons free from rebranding, 2022
- **Established players expand their ranges**
- **Warburtons continues to grow gluten-free portfolio**
- **White Rabbit calls out sourdough**
Figure 20: White Rabbit doughballs call out sourdough content, 2022
- **BFree and Dr Schär continue to expand world cuisine bread offering**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100

Figure 21: BFree stone baked original naan breads, 2022

- **Gluten-free claims in UK food market in slight decline as vegan/no animal ingredient claims grow**

Figure 22: Share of food product launches with selected free-from claims, by claim, 2018-22

- **Multiple free-from claims widen gluten-free products' potential audience**

Figure 23: Share of gluten-free food product launches with a vegan, vegetarian or plant-based claim, 2018-22

- **White Rabbit claims first-to-market free-from calzone and expands into ready meals; Dr Schär launches Plant Burger**

Figure 24: Recent examples of gluten-free products tapping into plant-based trend, 2022

- **Greater gut health focus in gluten-free breakfast cereals**

Figure 25: Recent gluten-free breakfast cereal launches targeting gut health, 2022-23

- **Quinola and Clive's look to sustainability**

Figure 26: Recent gluten-free launches with sustainability claims, 2022

AVOIDANCE OF GLUTEN/WHEAT

- **One in five avoid gluten, equal number avoid wheat**

Figure 27: Avoidance of gluten/wheat in the household, 2023

- **Usage of gluten-/wheat-free foods is heavily skewed towards younger demographics**

Figure 28: Usage of gluten-/wheat-free foods, by age, 2023

- **Opportunities remain to expand usage amongst gluten/wheat avoiders**

Figure 29: Purchase of gluten-/wheat-free foods, by avoidance of gluten and wheat in household, 2023

PERCEPTIONS OF LIMITING/REDUCING INTAKE OF GLUTEN/WHEAT

- **Three in 10 people view limiting gluten/wheat as expensive**

Figure 30: Perceptions of limiting/reducing intake of gluten/wheat, by gluten/wheat avoidance in the household, 2023

- **Potential for own-label to gain ground**

- **Positive perceptions drive usage**

- **Nearly one in five people view limiting gluten/wheat as good for digestive health**

Figure 31: Genius actively calls out active cultures and claims to be gut loving, 2021

- **High fibre and vegetable callouts can help to fortify digestive health link of gluten-/wheat-free products**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Figure 32: Recent examples of gluten-free products with fibre or vegetable content central to proposition, 2022

BEHAVIOURS RELATED TO GLUTEN-/WHEAT-FREE FOODS

- **Half of gluten-/wheat-free buyers would prioritise treats if money was tight**

Figure 33: Behaviours related to gluten-/wheat-free foods, by buyers and non-buyers, 2023

- **Frozen bake-at-home bakery products deserve renewed attention**
- **Premium options can also chime...**
- **...but driving awareness and visibility will be crucial**
- **26% would like more help on how to cook gluten-/wheat-free dishes**
- **Recipe videos are pertinent...**
- **...as are collaborations with social media personalities**
- **At-home occasions will be particularly significant during income squeeze**

Figure 34: Recent examples of frozen premium gluten-free cakes and desserts, 2022

FACTORS THAT WOULD ENCOURAGE PURCHASE OF GLUTEN-/WHEAT-FREE FOODS

Figure 35: Factors that would encourage purchase of gluten-/wheat-free foods, by buyers and non-buyers, 2023

- **Significant opportunities exist for mainstream brand extensions and collaborations**
- **Treat and snack categories hold particular potential**
- **Sustainability is a considerable push factor towards gluten-/wheat-free**
- **Openness to unusual ingredients points to opportunities**

Figure 36: Recent examples of gluten-free products calling out the contribution of chickpeas to soil health, 2021-22

- **Fonio can help gluten-/wheat-free products tap into longer-term concerns around global water resources**

Figure 37: Yolélé Sea Salt Fonio Chips, 2023

ATTITUDES TOWARDS GLUTEN-/WHEAT-FREE FOODS

- **A quarter view gluten-/wheat-free products as too processed**

Figure 38: Attitudes towards gluten-/wheat-free foods, by buyers and non-buyers, 2023

- **Making small number of ingredients central to on-pack messaging remains pertinent**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world's leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit store.mintel.com

EMEA +44 (0) 20 7606 4533

Brazil 0800 095 9094

Americas +1 (312) 943 5250

China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

- Figure 39: Recent examples of products calling out how few ingredients they contain, 2020-23
- **Näkd also offers cues**
Figure 40: Näkd calls out natural ingredients and way its bars are made, 2022
 - **Genius “lifts the curtain” on the role of its ingredients**

APPENDIX – DATA SOURCES, ABBREVIATIONS AND SUPPORTING INFORMATION

- **Abbreviations**
- **Consumer research methodology**

APPENDIX – FORECAST METHODOLOGY

- **Market forecast and prediction intervals**
Figure 41: Market forecast and prediction intervals for UK value sales of gluten-/wheat-free foods, 2022-27
- **Market drivers and assumptions**
- **Forecast methodology**

APPENDIX – MARKET SHARE

Figure 42: Leading manufacturers’ sales and shares in the UK gluten-free bread, cake, morning goods and sweet treats retail market, by value and volume, 2020-22

What's included

Executive Summary
Full Report PDF
Infographic Overview
Powerpoint Presentation
Interactive Databook
Previous editions

Did you know?

This report is part of a series of reports, produced to provide you with a more holistic view of this market.

All Mintel 2020 reports contain specific COVID-19 related research and forecasts. The world’s leading brands rely on Mintel reports for the most complete, objective and actionable market intelligence.

Buy this report now

Visit	store.mintel.com
EMEA	+44 (0) 20 7606 4533
Brazil	0800 095 9094
Americas	+1 (312) 943 5250
China	+86 (21) 6032 7300
APAC	+61 (0) 2 8284 8100



About Mintel

Mintel is the **expert in what consumers want and why**. As the world's leading market intelligence agency, our analysis of consumers, markets, product innovation and competitive landscapes provides a unique perspective on global and local economies. Since 1972, our predictive analytics and expert recommendations have enabled our clients to make better business decisions faster

Our purpose is to help businesses and people grow. To find out how we do that, visit **[mintel.com](https://www.mintel.com)**.