

Free-from Foods - Ireland - December 2020

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This report looks at the following areas:

- The impact of COVID-19 on consumer behaviour and free-from food and drink.
- The impact of Brexit on the availability and labelling of free-from foods.
- The highly processed image of free-from foods needs to be addressed.
- The opportunities and threats of promoting plant-based vs vegan claims on free-from foods.

Irish consumers are spending significantly more time at home and with that, we are seeing greater exploration of food and drink. While some are turning towards healthy foods, others are indulging, but both behaviours appear to be benefitting the free-from category, with 38% of NI and 37% of RoI consumers agreeing that COVID-19 has seen them eat/drink more free-from foods, and over half of IoI consumers agreeing they have been trying more different types of free-from in the last six months.

For these reasons, the free-from category is booming in 2020 with sales for the IoI market increasing by 12% between 2019 and 2020, up from 8% growth in the previous year. The sales trajectory is expected to continue on its growth path as NPDI within free-from foods expands and consumers face greater choice.

The free-from category's high price bracket continues to deter more cash-strapped consumers. As more consumers than ever are feeling the pinch, this could have implications for free-from considering that 46% of RoI and 41% of NI consumers agree to cutting back on free-from food/drink when money is tight.

In saying this, growing interest in plant-based and flexitarian diets is helping to move free-from foods into the mainstream, with dairy alternatives reaping the rewards more so than other categories. Meat alternatives are also seeing significant demand and, as greater emphasis is placed on the meat and dairy industry's unsustainable future, more consumers are likely to start switching them out for plant-based alternatives.



"The free-from category has experienced exceptional growth in recent years and 2020 was no different. More time spent at home coupled with the closure of foodservice and the bulk-buying behaviours witnessed during the beginning of the pandemic all resulted in increased demand for free-from foods."

– Emma McGeown, Senior Food & Drink Analyst

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