The Rise in Demand for a Free From Diet

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Free From in Ireland – The Headlines

- **Free from records 8% retail value growth to reach EUR127 million in 2019**
- **Innovation continues in free from meat in 2019**
- **Free from is expected to record a current retail value CAGR of 7% (a 5% constant 2019 retail value CAGR) over the forecast period**

Source: Euromonitor International 2020

The free from category, which includes free from allergens, free from gluten, free from lactose, free from dairy and free from meat products, continued to grow over the last 5 years and is forecast to reach £1.3 billion in 2024, growing by 41% over the 2019-24 period.* While still an impressive rate, this marks a noticeably slower pace than seen in the last five years, as the free-from trend is now a firmly established phenomenon. The dairy alternatives market, however, should benefit from the public focus on the environment, which looks set to endure.

As consumer interest in gluten-free products has grown, the category has transitioned from a niche to a mainstream market segment. Boosting demand in the market for gluten-free foods are new product launches featuring flours based on nuts, seeds, beans, fruits and vegetables that appeal across a range of diet trends.

The consumption of free from dairy and gluten foods has moved beyond nutritional needs related to intolerances or allergies. Many consumers now identify these products as healthier for them than the regular offerings, consolidating free from foods as one of the key growth drivers in the health and wellness space. Providing 'better-for-you' credentials alongside indulgence can help grow consumption frequency. This perception of permissible indulgence is something which is driving innovation across various categories.

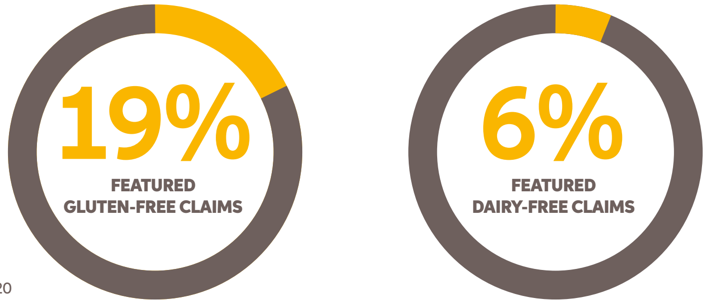
Dairy-free claims have been rapidly gaining share of launches in the dairy and dairy alternatives category.

However, vegan claims overtook these in 2019.

*Source: Mintel Free From Foods UK 2020

Free-from claims continue to gain share in food launches

The number of product launches which include free-from claims has continued to grow across the UK food market.



Source: Mintel Free From Foods UK 2020

However, dairy alternatives and gluten-free bakery launches are also in growth. Cold cereals have seen the strongest growth in share of launches with a gluten free claim while snack/cereal/energy bars have retained their lead as the segment.

Across both the gluten- and dairy-free segments, various brands have looked beyond relying on the absence of these as a sole selling point, to featuring a number of claims addressing key current health concerns. Consumers are now looking to diet and nutrition to support their digestive health. According to Mintel, 26% of UK consumers believe that free from foods are good for digestive health. As a result many gluten-free products feature fibre and protein claims as well as low- and no-added-sugar ones, while various dairy alternatives highlight their added vitamins and calcium, as well as their protein content. Brands now need to emphasise the presence of inherent and added nutrition, and deliver functional health benefits, to appeal as part of a broader wellness regime.

With the free-from trend now a firmly established phenomenon, growth is expected to slow. The dairy alternatives market, however, should benefit from the public focus on the environment, which looks set to endure. Meanwhile, consumer interest in free from products supporting digestive health and those catering for special occasions as well as indulgent variants points to NPD opportunities.

Get in Touch

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