2025

UK F&B trends report

Consumer trends for grocery brands and retailers

Attest

Introduction

As we focus on strategy for 2025, how have UK grocery shoppers' habits and behaviours changed? This report looks at several years of data to answer the question. It's designed to help F&B brands and retailers with their planning, providing essential insight for things like positioning and messaging, pricing and promotions, and new product development.

The data delves into changing tastes and priorities, category trends, consumption patterns, and purchase drivers. In particular, we look at how data points have fluctuated in the years post-Covid to understand what trends were influenced by the pandemic, and which ones are here to stay.

Sample

The data in this report comes from a survey of 1,000 nationally representative working-age UK consumers conducted on the Attest platform in September 2024. It is benchmarked against comparable surveys from 2019, 2021, 2022 and 2023.

Online grocery shopping is on the rebound

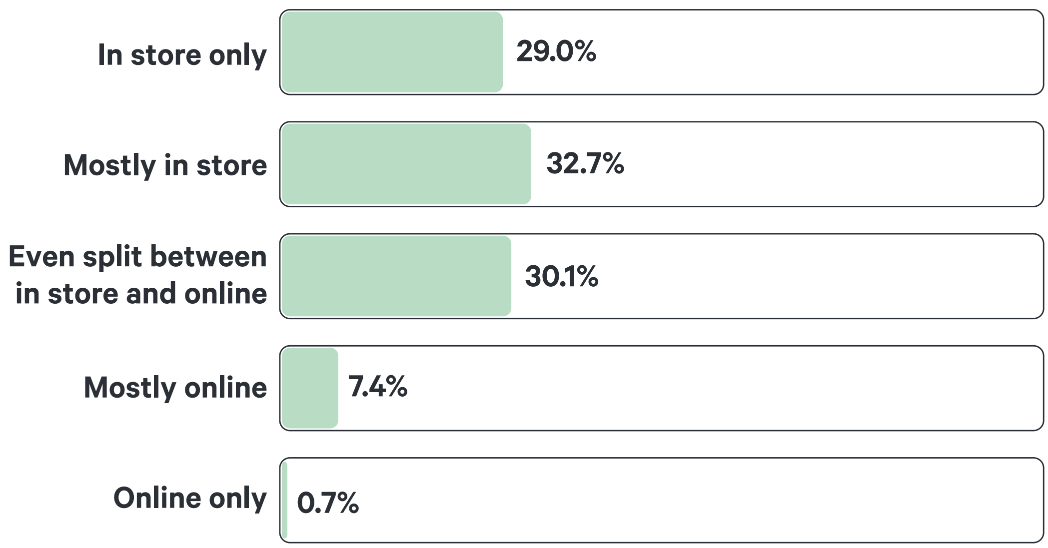
The pandemic saw the popularity of online grocery shopping spike. In 2021, 74.2% of Brits were doing at least some of their shopping online. But what's happened since then? Our data shows there was a big return to stores in 2022, with a lesser 54.2% ordering online.

Today, online grocery shopping is trending upwards again, with 71.0% of consumers buying at least part of their groceries online. More specifically, we see a -16.8 percentage point decrease in the number of die-hard in-store shoppers (to 29.0%). This indicates that sales channels are becoming more diversified.

Extra insight

Nearly 54% of consumers believe the best grocery deals are offered in-store. Gen Z shoppers (aged 18-24) especially hold this belief – a perception retailers should work to change

Where UK consumers shop for food



Grocery spend has increased

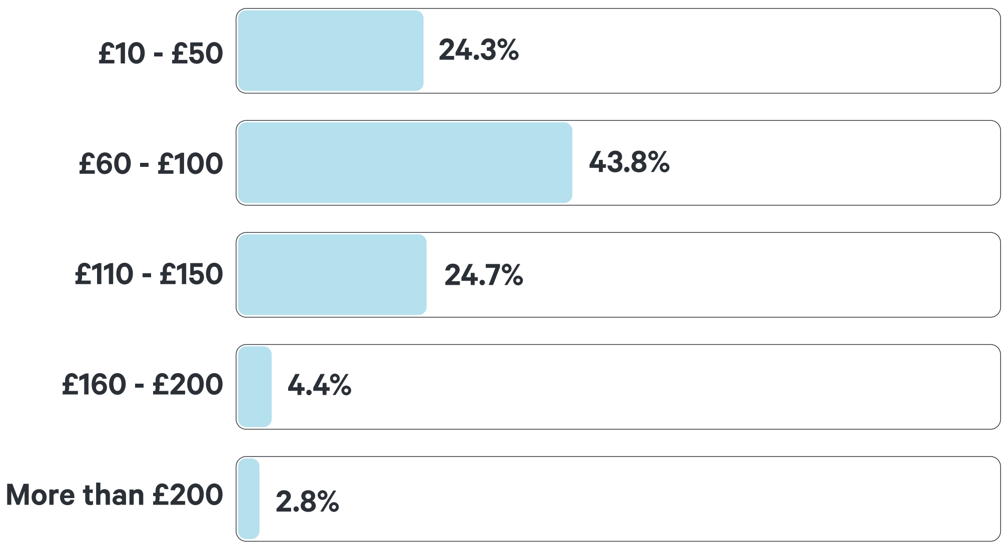
Food inflation has slowed down compared to the previous few years but supermarket prices remain high. So what impact is this having on Brits' weekly grocery spend? Compared with 2022, we see a +18.5 percentage point increase in the number of consumers spending in excess of £100 on groceries per week (to 31.9%).

The lowest spending consumers have been squeezed the most, with the percentage who previously spent £10-£50 per week on food having declined by -18.8 percentage points to 24.3%: this would suggest consumers are no longer able to feed themselves on this amount.

Extra insight

The highest spenders are those aged 35-44: 30.4% spend £110-£150 per week on groceries, while 8.8% spend in excess of £150.

Amount UK consumers spend on groceries per week



Shoppers are less thrifty

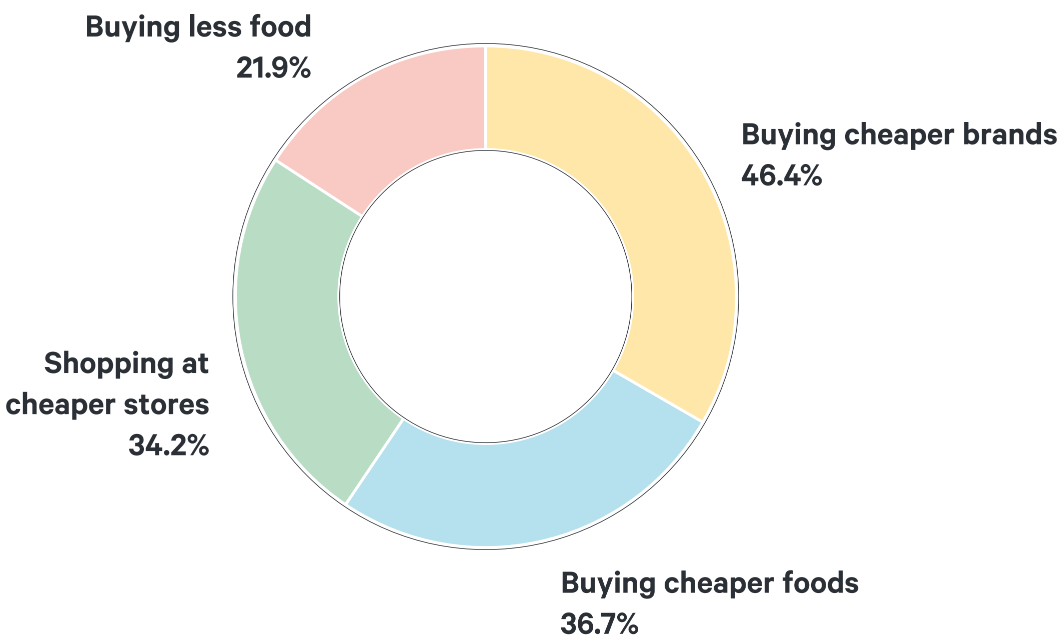
Consumers are becoming less inclined to make special efforts to curb their grocery spending. In 2022, 51.4% of shoppers were buying cheaper types of food, but in 2024 that figure has declined by -14.7 percentage points (to 36.4%). Likewise, we see a -12pp reduction in consumers trying to buy less food, to 21.9%.

The most popular tactic for reducing spend is to buy cheaper brands but this practice has also declined by -7.8 percentage points (to 46.4%). Consumers are now less likely to make a trip to a cheaper supermarket: down by -5.2pp to 34.2%, suggesting the easing of inflation is making a difference.

Extra insight

The urgency to reduce grocery spend is waning; since last year there's been a -19.8 pp decline in consumers who are 'very likely' to shop around to get the best deals (to 39.2%).

How UK consumers are cutting back on grocery spend



Sainsbury’s makes a comeback

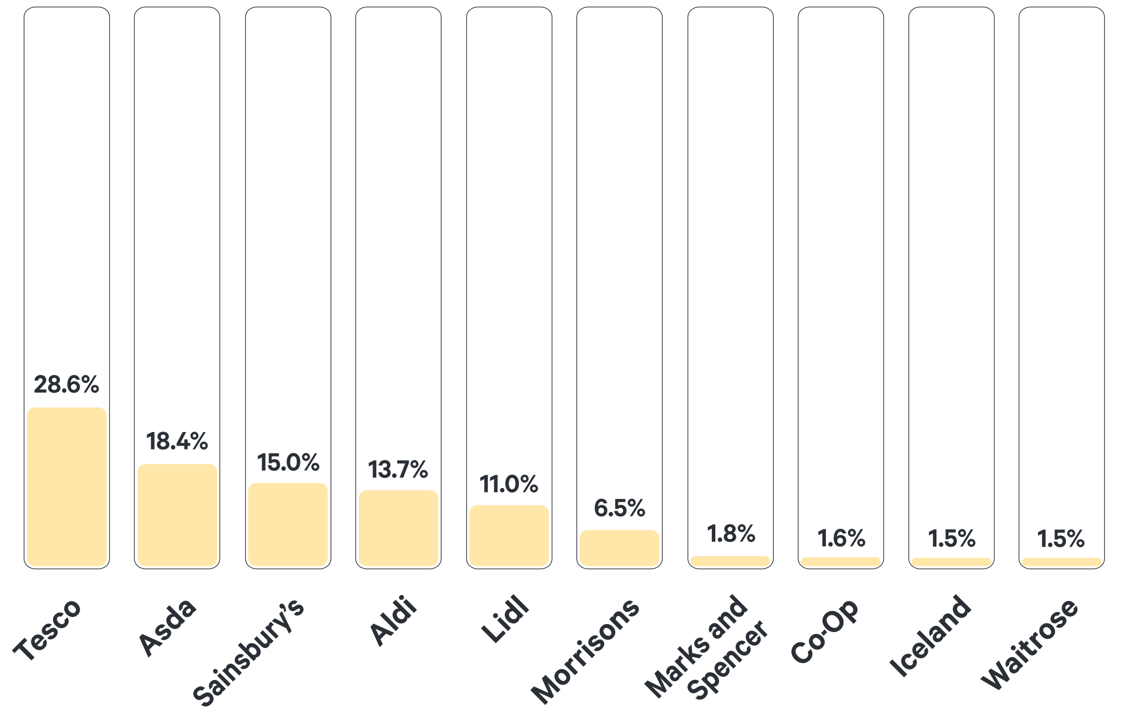
Sainsbury’s has chalked up the biggest growth in regular shoppers since 2022, with a +7.8 percentage point increase to 15.0%. However Tesco remains on top, favoured by 28.6% of shoppers (an increase of +6.2 percentage points).

Meanwhile, German discounter Aldi has registered a -12.2 percentage point decline in committed shoppers. Now, only 13.7% of Brits say they shop mostly at Aldi, which reflects consumers’ dwindling motivation to seek out cheaper groceries.

Extra insight

Tesco and Lidl over-index for being popular among Gen Z shoppers: 37.6% and 17.4% of 18-24-year-olds habitually use these supermarkets.

UK consumers’ most shopped at supermarkets



Opportunity for own brand has weakened

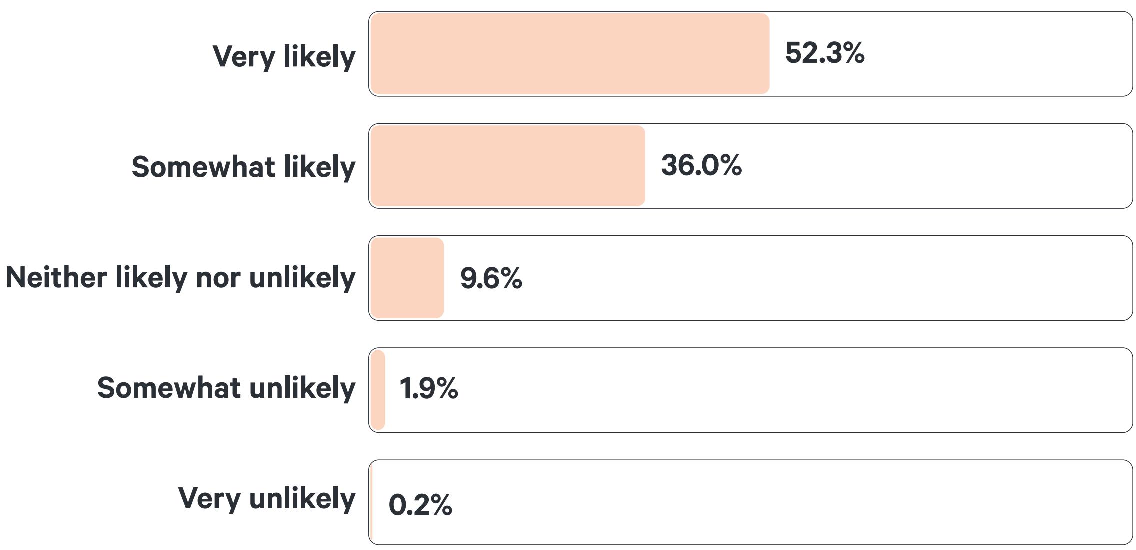
In line with stabilising food prices, the opportunity for own brand products is starting to decline. While consumers remain overwhelmingly likely to purchase supermarket branded goods (88.3%), the percentage who state they are ‘very likely’ to purchase them has declined by -7.8 percentage points since last year.

This finding is in line with data from 2023 which showed that only 25.6% of shoppers would definitely stick with own brand products if price wasn’t an issue. This trend means greater opportunity for premium household brands to win back market share.

Extra insight

The influence of price on product selection has lessened. In 2022, 57.6% ranked price their first priority, versus 46.8% today. Meanwhile, the influence of ‘quality/taste’ has notably increased.

UK consumers’ likelihood to purchase supermarket own brand products



Meat-eating is back in vogue

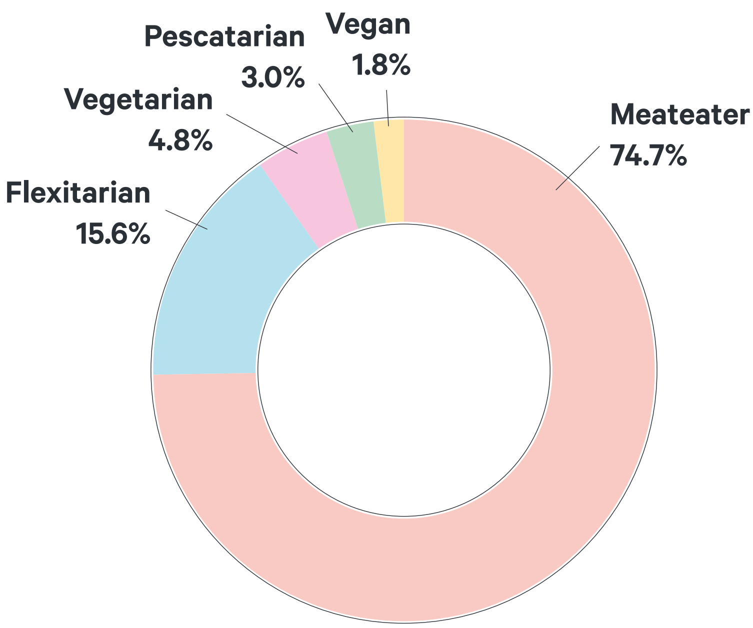
There are signs that veganism's growth is tailing off (and meat-avoidance in general). The percentage of Brits who identified as meat-eaters in 2021 was 63.2%, but today that figure has risen to 74.7%.

Flexitarianism has also declined by -7.6 percentage points since its peak (to 15.6%). Meanwhile, pure veganism has declined from 3.3% in 2021 to a miniscule 1.8% in 2024. This is reflected in purchasing habits: since 2021, the percentage of consumers who say they purchase plant-based 'meat' has declined by -4.3 percentage points to 20.6%, while purchasing of plant-based 'milk' remains static at 26.2%.

Extra insight

Just over 17% of consumers say they're actively trying to reduce their meat consumption, which is an -8.8pp decline compared with 2019.

How UK consumers describe their diets



Drinkers aren't embracing no and low options

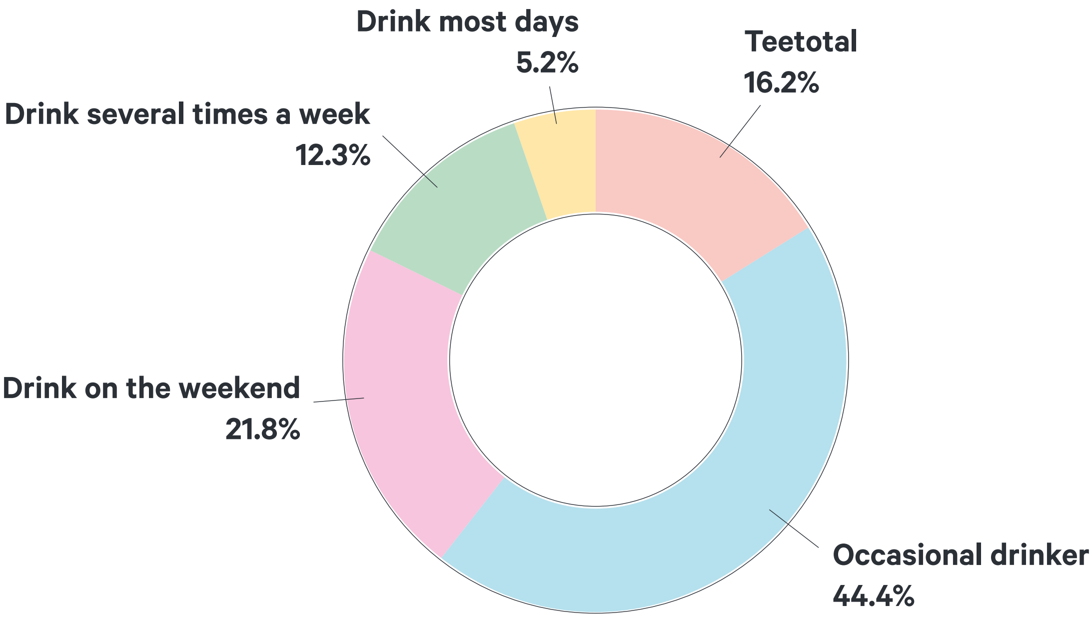
The sober curious movement suffered a blow during the pandemic. In 2019, 23.9% of Brits identified as teetotal. But drinking skyrocketed when Covid confined us to our homes, and by 2021 the number of non-drinkers had declined to 14.1%.

Today, 16.2% of consumers describe themselves as 'teetotal', showing little growth, while the percentage of 'occasional' drinkers stays static at 44.4%. Overall, it looks like trends in alcohol remain consistent with 2021, although the consumption of low and alcohol-free beers, wines and spirits has increased moderately, by +2.1 percentage points to 16.2%.

Extra insight

Gen Z lead the way in the sober stakes: 26.2% describe themselves as teetotal versus only 17.0% of those aged 26-34.

How UK consumers describe their alcohol consumption



Healthy eating is trending up

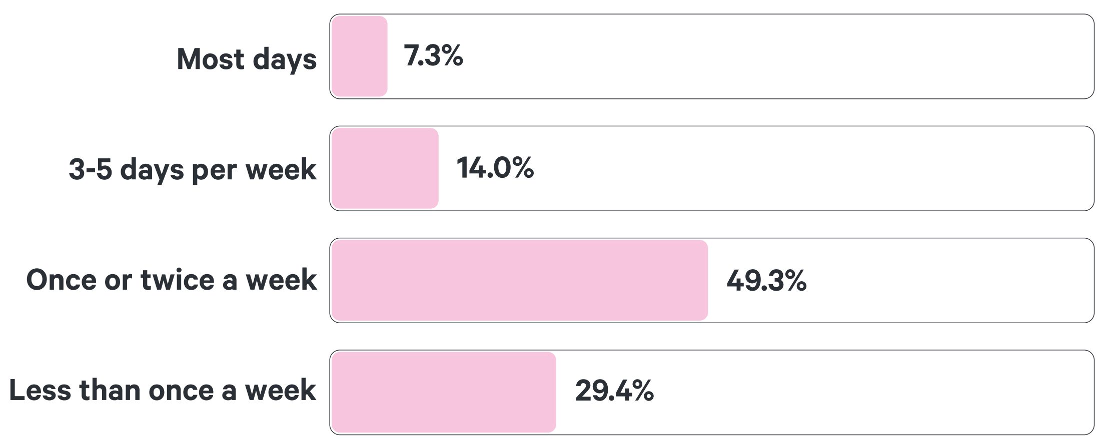
UK consumers are becoming more conscious about what they put on their plates: since 2021, the number of Brits who say they eat unhealthy meals more than twice a week has decreased by -29.9 percentage points (to 21.3%).

Unhealthy snacking has also seen a dramatic decline of -26.6pp. The majority of consumers (57.6%) now eat unhealthy snacks just two times a week or less. The healthiest eaters are Brits aged 55-64 (only 11.6% regularly eat unhealthy meals), while Gen Z are the biggest snackers (55.0% snack frequently).

Extra insight

Cooking from scratch more than twice a week has declined by -8.7pp (to 82.6%), highlighting an opportunity for healthy convenience foods.

How often UK consumers eat unhealthy meals



Salt and fat are less of a concern

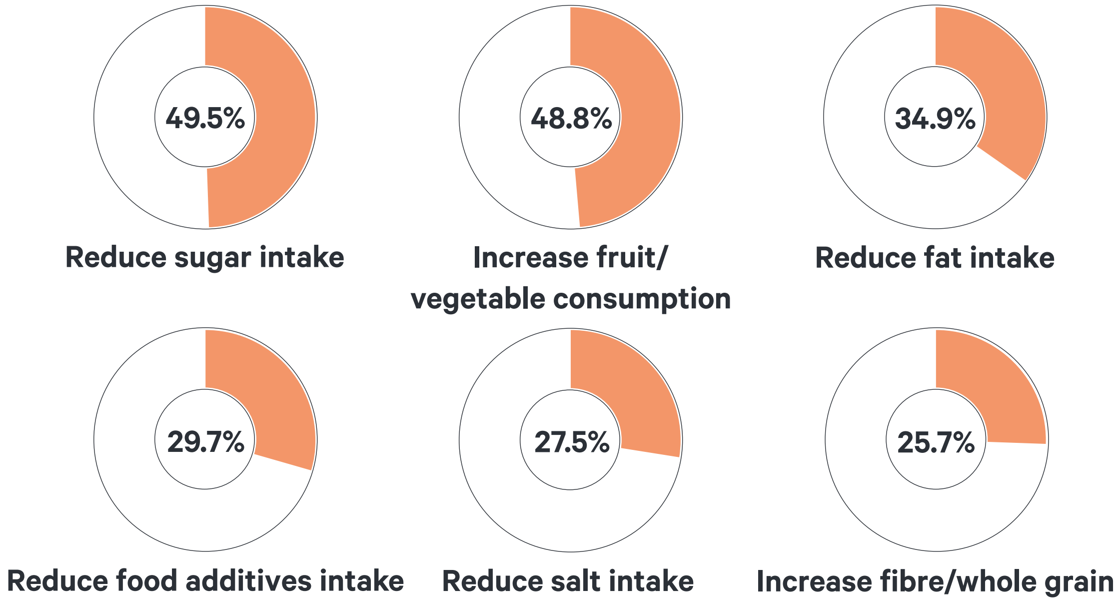
While sugar is still a key concern for UK consumers, the percentage who are trying to reduce their intake of salt and fat has notably declined since 2019. Today, 27.5% of shoppers say they are actively trying to cut down on salt (a decline of -13.5 pp), while we see a -10.6 percentage point reduction in shoppers focused on fat (to 34.9%).

With a lot of talk in the news around ultra processed foods (UPFs), it's no surprise that nearly 30% of consumers are trying to cut down their intake of food additives. While we do not have historic data to benchmark this figure against, it's likely this trend will continue to grow.

Extra insight

Just over 66% of consumers say they check a product's nutritional information, showing the importance of clear labelling.

UK grocery shoppers' health goals



Protein is driving sales

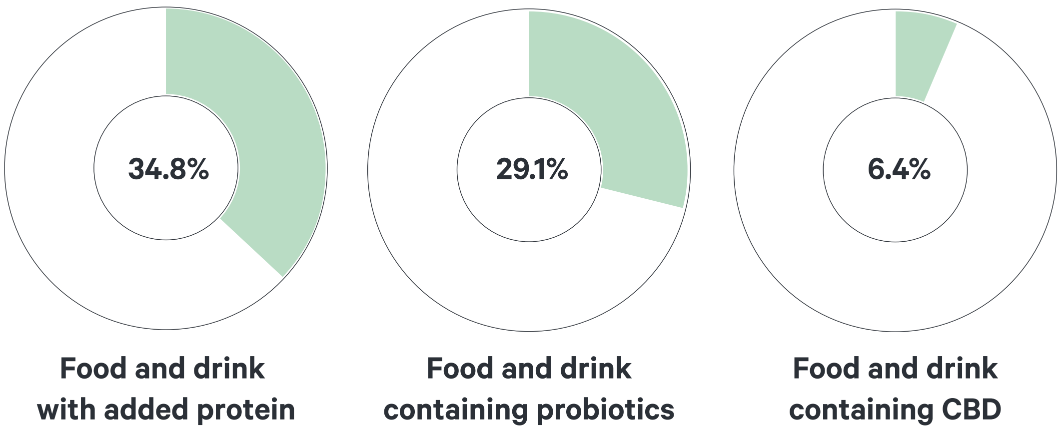
Protein is increasing its reputation as a hero ingredient: since 2021, there's been a +15.2 percentage point increase in Brits purchasing food and drink containing added protein (to 34.8%).

Probiotics have also increased in popularity as an additive: we see a +8.9 percentage point uptick in consumers shopping for products containing probiotics (to 29.1%). On the flip side, CBD has failed to take flight as an additive: only 6.4% of consumers currently purchase food and drink containing CBD (a reduction of -1.8pp compared with 2021).

Extra insight

Gen Z over-index for buying added-protein products, and 44.3% say they actively look for products with ingredients to support fitness and strength.

UK consumers purchasing products with health additives



Unpackaged goods are losing their appeal

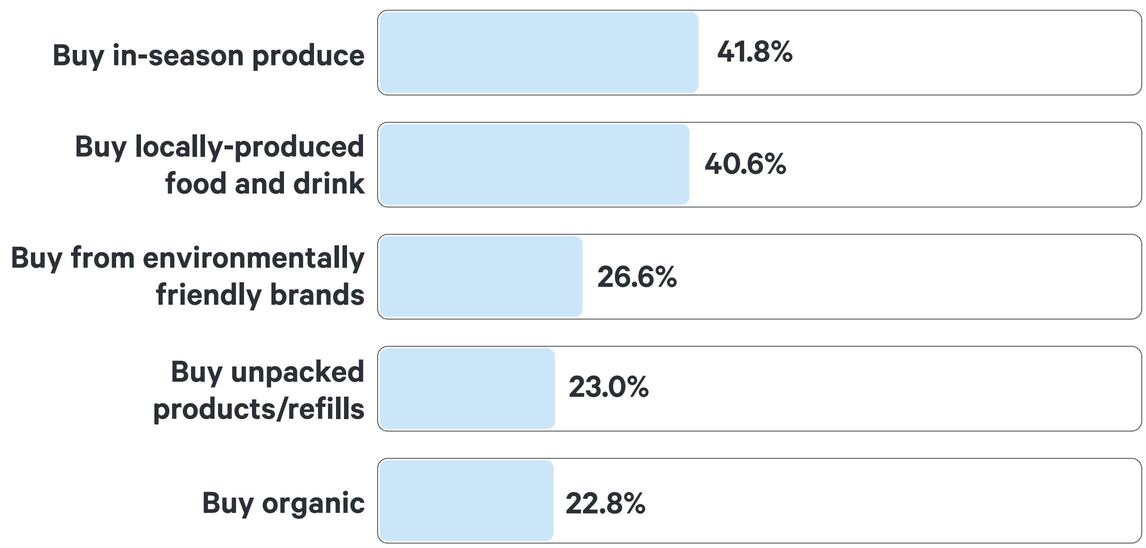
One grocery trend that's lost steam is buying unpackaged goods or refills. In 2021, 35.2% said it was something they actively tried to do. Today, that figure has declined by -12.2 percentage points to 23.0%.

Other trends that are starting to recover after taking a dive in 2022 are buying locally-produced food and drink (up +9.8pp to 40.6%) and buying from environmentally-friendly brands (up +4.8pp to 26.6%). Meanwhile, buying in-season produce has recorded steady growth since 2021, rising +4.8 percentage points to 41.8%, making it the top environmental intention for UK shoppers today.

Extra insight

Young shoppers show significantly higher intent to purchase from green F&B brands, while older shoppers are more motivated to buy in-season produce.

UK consumers' active intentions when grocery shopping



Cost of food is now more important than plastic packaging

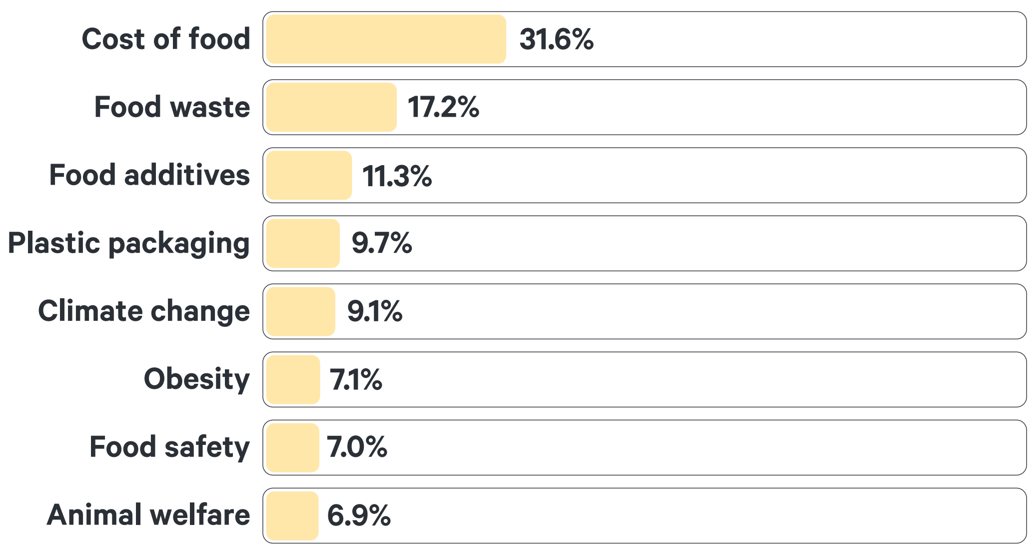
There's been a huge shift in consumers' priorities when it comes to what they think are the most pressing issues for the food industry to address. Back in 2021, plastic packaging was top of mind for Brits, but concern about this has dropped by a huge -23.0 percentage points.

Plastic packaging is now only the fourth most-pressing issue in the eyes of the consumer. Meanwhile, concern about the cost of food has shot up by +18.1 percentage points, making it the main issue consumers want tackled. New to the survey this year, 'food additives' comes straight in at number three (behind food waste).

Extra insight

A consistent level of concern around food waste since 2021 indicates it's an issue that warrants long term investment and action.

Issues of most concern to UK grocery shoppers



Need to understand how these trends affect your F&B brand?

Speak to a research expert today

www.askattest.com

Attest