

Market Report 2025

Plant-based Food Retail Market Development and Consumer Trends

April 2026

| ProVege |
Plant Based Food Finland

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Introduction

This market report is the first comprehensive overview of the Finnish retail market for plant-based products. As plant-based categories are still relatively new, no publicly available market data has been compiled until now. One key reason for this data gap has been the lack of clear category definitions, specifically, which products should be included in the plant-based food market and which should not. The absence of market data has been a clearly identified bottleneck in the sector, hindering market development and, for example, the development of new product innovations. Addressing this data gap has therefore been one of the most important priorities for our industry association.

The publication of the updated national dietary guidelines in late 2024 makes the year 2025 particularly interesting from a market perspective. For this reason, we conducted a comprehensive consumer survey to examine trends and attitudes towards plant-based foods. Together with the market data, these insights provide a comprehensive understanding of the current state of plant-based products in the Finnish retail market and how consumers perceive them.

In compiling this first market report, we have also defined more precisely what is meant by the plant-based food market. Our classification highlights the wide range of product categories that make up the retail market. Applying this framework

more broadly will enable more consistent market monitoring, which is beneficial for a maturing industry.

This report would not have been possible without the contribution of our retail members S Group, Kesko, and Lidl, which provided their sales data on plant-based products. We extend our sincere thanks for their contribution.

We hope this report will be valuable for companies in the sector, researchers, policymakers, media, and other stakeholders.

Summary

- The Finnish retail market for plant-based products was valued at approximately €240 million in 2025, remaining at roughly the same level as in 2024. In volume terms, the market grew by 3.6%.
 - Plant-based food products: €81.9 million, +1.7% (8.7 million kg, +3.1%)
 - Legumes: €24.0 million, +3.4% (6.4 million kg, +4.5%)
 - Non-dairy products: €138.5 million, -1.4% (53.7 million kg, +3.6%)
- Non-dairy products are the largest product group within the plant-based market. Within this category, plant-based drinks, particularly those used in coffee, have been a key driver of growth, gaining regular users also among omnivores.
- 15% of respondents report having made changes to their food choices following the dietary guidelines.
- 39% report that the dietary guidelines have increased their interest in plant-based products.
- The dietary guidelines appear to have encouraged dietary changes particularly among those who report aiming to reduce meat consumption.
- Although retail sales and survey results show, for example, a significant increase in the use of legumes, consumers do not generally perceive their diets to have changed. On the contrary, the share of respondents identifying as omnivores has even increased.



About the Report

How the Market Data was Compiled

The construction of the dataset began with defining the overall plant-based food market and its constituent product categories, as no unified definition had previously existed. In developing the categorisation, Plant Based Food Finland's experts drew on best practices from existing product classifications used by retail chains, in-store merchandising, and international market reports.

The market was structured into three main categories: plant-based food products, legumes, and non-dairy products, each with two additional sub-levels. The resulting three-tier category structure is presented in Appendix 1.

Based on this categorisation, retail chains S Group, Kesko, and Lidl provided lists of products that could potentially belong to the defined categories. These products were then reviewed item by item and assigned to the appropriate

category within the classification structure.

Sales data for the included products was compiled for the years 2024 and 2025. The retail chains submitted the data to an external consultant under strict confidentiality, meaning that Plant Based Food Finland did not have access to retailer-, company-, or product-level sales data. The consultant aggregated the data according to the defined categorisation, resulting in total sales figures for each level of the category structure.

The reported sales figures are presented in value terms excluding VAT to ensure comparability over time, particularly in the case of potential tax changes. Volume data is not comparable at category level 1, but is comparable at levels 2 and 3.

The guiding principle in defining the market was to include products that are typically used as alternatives to animal-based products.

Limitations

- Certain product categories have been excluded from the plant-based food market, such as nuts and seeds, which are not typically used as substitutes for animal-based products, as well as traditionally plant-based categories such as margarine and fruit-based snack products.
- The market data is based on sales figures from Finland's three largest retail chains and therefore covers approximately 92% of the Finnish retail market. The figures have not been adjusted to represent the total market, as the share of these major retailers within the analysed categories may exceed their overall market share.
- The data does not perfectly reflect actual sales, as some degree of human error in data collection is possible. However, it can be assumed that the data is sufficiently close to reality and represents the best available estimate of market development.
- Plant Based Food Finland cannot be held responsible for any potential inaccuracies in the sales data.
- The survey questions were originally presented in Finnish and have been translated into English for this report, which may result in slight differences in meaning.

Consumer survey

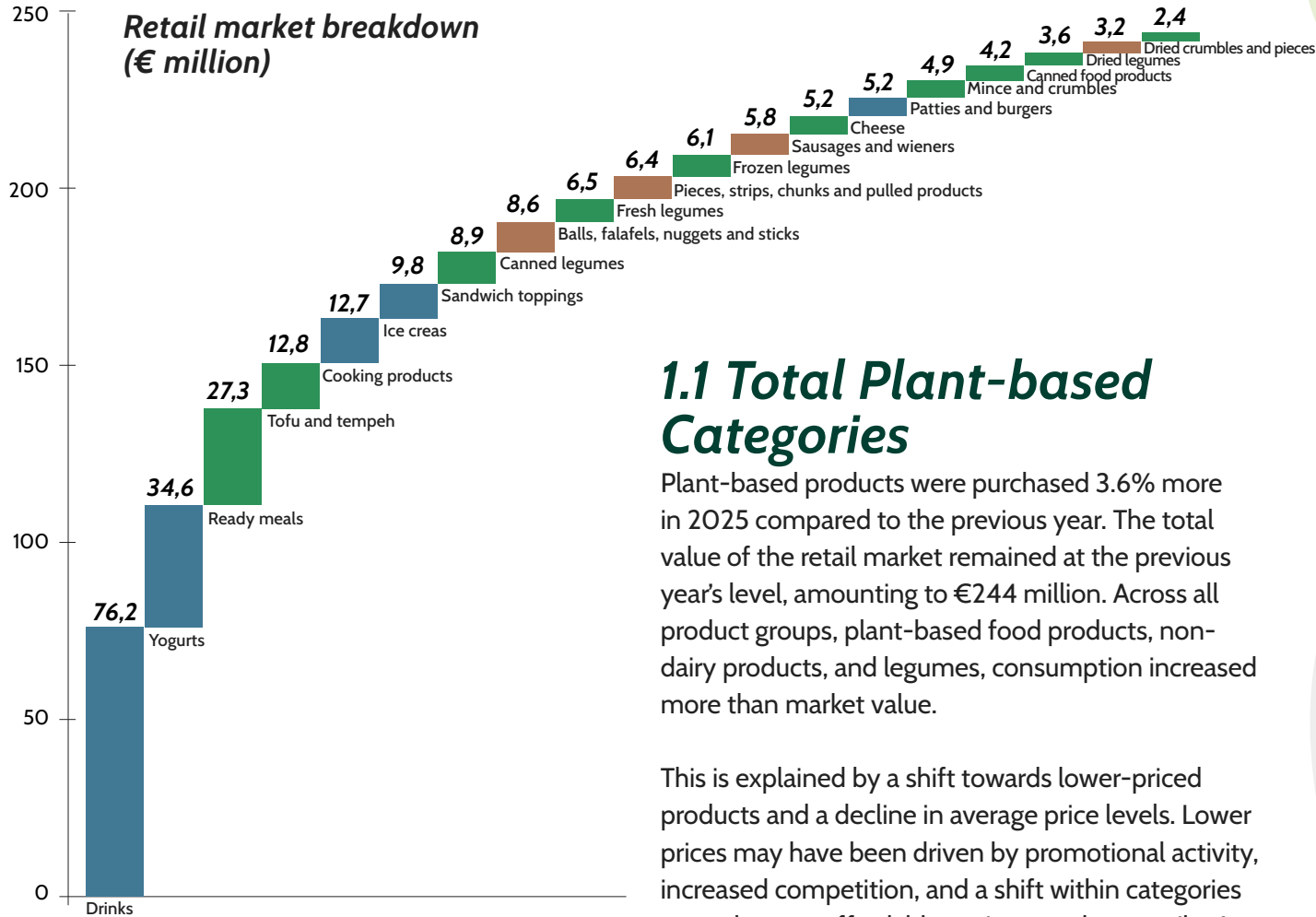
To support the interpretation of changes observed in retail sales, a study on consumer attitudes towards plant-based food was conducted. In particular, the survey focused on the impact of the dietary guidelines on purchasing behaviour, intentions, and perceptions.

The survey was conducted by Foodwest Ltd. on behalf of Plant Based Food Finland. Data was collected through a nationwide online survey in early 2026 (weeks 8–9). The sample consisted of 1,007 respondents and was representative of the Finnish population in terms of size and demographics.

The analysis of this survey was complemented by results from Foodwest's earlier Foodata: Plant-based & Meat study, which examined consumer attitudes towards and usage of meat and plant-based products. Incorporating this earlier dataset enables comparisons over time and helps identify changes in attitudes and emerging trends.



1. Retail Market Development



1.1 Total Plant-based Categories

Plant-based products were purchased 3.6% more in 2025 compared to the previous year. The total value of the retail market remained at the previous year's level, amounting to €244 million. Across all product groups, plant-based food products, non-dairy products, and legumes, consumption increased more than market value.

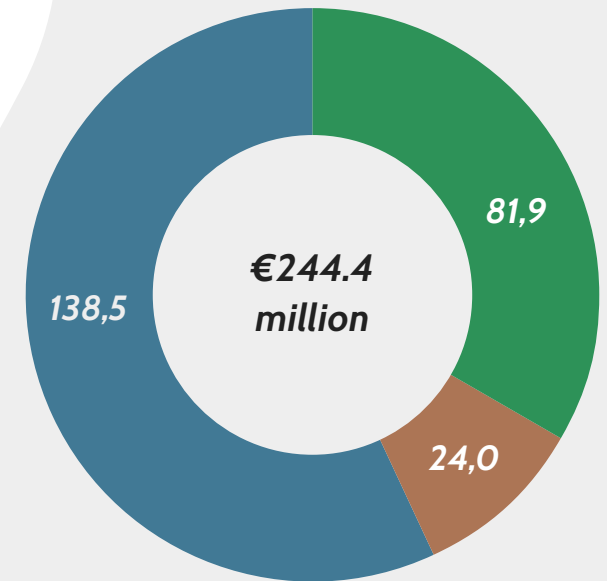
This is explained by a shift towards lower-priced products and a decline in average price levels. Lower prices may have been driven by promotional activity, increased competition, and a shift within categories towards more affordable options, such as retailers' own brands (private labels).

The product segments included in the plant-based food market are listed in Appendix 1.

Change €
+0,1 %

Change vol.
+3,6 %

- Plant-based food products
- Legumes
- Non-dairy products



Consumption grew across all main categories.

1.2. Plant-based Food Products

Chilled Plant-based Protein Products

The most notable change within chilled plant-based protein products has been a shift in sales from mince and crumbles to pieces, strips, chunks and pulled products. Sales of the former declined by €580,000 (-12%) in 2025, while the latter increased by €890,000 (+17%). This trend reflects the focus of recent product innovations. Together, these two segments form a market of approximately €10 million, which grew by 3.1%.

Market development in plant-based protein products is being challenged by an intensifying public debate around food processing, even though many of the concerns are not supported by nutritional evidence. Currently, over half of respondents consider plant-based protein products to be “too processed” compared to only around one-third in 2020. Notably, processing is not used as an evaluation criterion in the dietary guidelines.

At the same time, the market is supported by improved consumer perceptions of product quality. In 2022, 33% of respondents cited “I have tried the products and did not like them” as a barrier to use, whereas by 2026 this share had decreased to 22%.

Improvements in product quality and declining levels of dissatisfaction are likely to increase repeat purchases and provide a solid foundation for future category growth.

Tofu and Tempeh

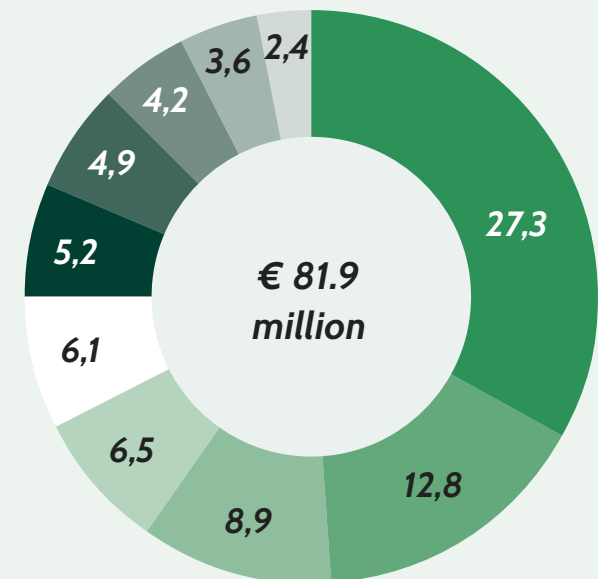
Tofu and tempeh represent a significant segment within plant-based food products, with a market value of approximately €13 million. This segment grew strongly by 11% in 2025. Given that tofu is a long-established and relatively mature category, growth exceeding 10% can be considered notable, particularly as it clearly outpaces the average growth of plant-based food products overall. The increase in tofu sales coincided with the publication of the updated dietary guidelines.

Tofu and tempeh are consumed regularly by a relatively small but highly engaged group of users. According to the survey, only 15% of all respondents consume tofu or tempeh at least once a week, slightly less than for plant-based dried crumbles and pieces (16%) and chilled plant-based protein products (17%). However, among those following a more plant-forward diet, as well as vegetarians and vegans, the share rises to 57%, exceeding the corresponding figures for dried (46%) and chilled plant-based protein products (50%).

Change €
+1,7 %

Change vol.
+3,1 %

- Ready meals, -3,3 % €
- Tofu and tempeh, +11,4 % €
- Sandwich toppings, +8,3 % €
- Balls, falafels, nuggets and sticks, -12,1 % €
- Pieces, strips, chunks and pulled products, +17,1 % €
- Sausages and wieners, +1,4 % €
- Burger patties and schnitzels, +8,8 % €
- Mince and crumbles, -12,1 % €
- Canned food products, 1,4 % €
- Dried crumbles and pieces, +16,3 % €



Sandwich Toppings

The sandwich toppings segment, which includes cold cuts as well as hummus and pâtés, grew by 8.3% in 2025. Products in this category were highly visible in the public debate following the updated dietary guidelines.

In the revised dietary guidelines published in late 2024, particular media attention focused on the recommendation to avoid processed meat products such as cold cuts due to their nitrite content. According to the survey, among those who had made changes to their diets following the guidelines, 61%

reported reducing their consumption of processed meat products, while 6% reported increasing their use of plant-based alternatives.

Although the shift from animal-based to plant-based cold cuts has been limited, even a modest increase in adoption supports market growth. Hummus products have also benefited from the discussion around the dietary guidelines, particularly as legumes were recommended to be increased in the diet.

In contrast to the overall market trend, value growth in the sandwich toppings segment has exceeded growth

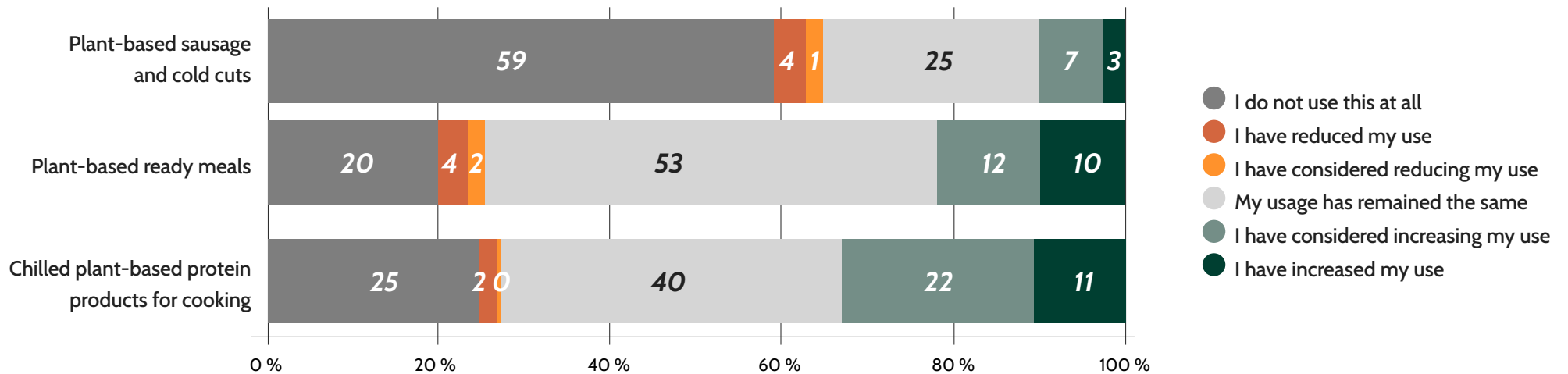
in consumption, reflecting an increase in average purchase prices within the category.

Ready meals

The ready meals segment consists of ready meals, snacks, frozen ready meals, and meal components. Overall, the segment declined slightly (-3.3%), although there are notable differences between subsegments.

In line with broader trends, sales of ready meal dishes increased significantly, supported in part by improvements in product assortment and availability.

Changes in purchasing behaviour over the past year



1.3. Legumes

The legumes market in 2025 showed a clear divergence. While frozen and canned legumes experienced strong growth, sales of fresh legumes declined sharply. As a result, overall category growth remained moderate at just over 3%.

Frozen and Canned legumes

The legumes category was particularly interesting in 2025, as it received special attention in the dietary guidelines published in late 2024. Volume growth was strong in both canned and frozen legumes, increasing by 14% and 7%, respectively. In value terms, sales in both segments grew by more than 12%. For well-established categories, such increases can be considered exceptional.

Survey results suggest that the dietary guidelines are a key factor behind this growth. The impact of the guidelines is examined in more detail in the second section of this report.

Notably, the increased demand for legumes does not appear to be primarily driven by

tighter household budgets. Consumers who reported increasing their consumption were not disproportionately those under financial pressure. On the contrary, increases, and intentions to increase, were more common among financially comfortable and more deliberate consumers.

It is also noteworthy that the increase in the use of plant-based protein ingredients was more pronounced among those aiming to reduce meat consumption than among those already following a more plant-forward diet.

Fresh Legumes

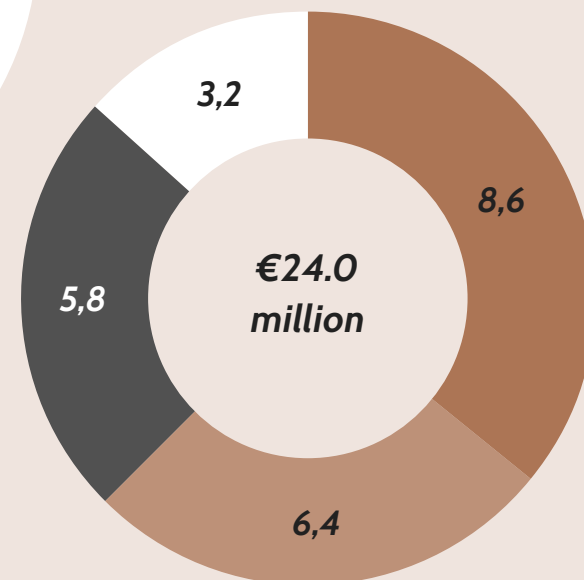
The fresh legumes segment did not follow the growth seen in canned and frozen products. Sales volumes declined sharply, by as much as 20%. The decrease in value was more moderate (-12.5%), indicating an increase in average prices.

In the comparison year 2024, the pea harvest was exceptionally strong, resulting in abundant supply and lower prices compared to 2025.

Change €
+3,4 %

Change vol.
+4,5 %

- Canned, +12,3 €
- Fresh, -12,5 €
- Frozen, +13,9 €
- Dried, +1,5 €

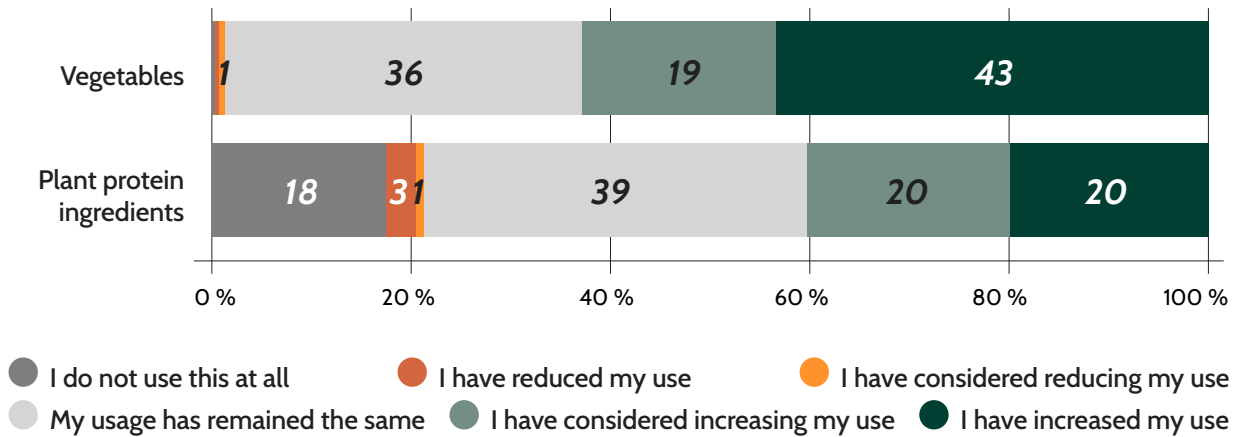


34 %
of the population report
consuming legumes weekly.

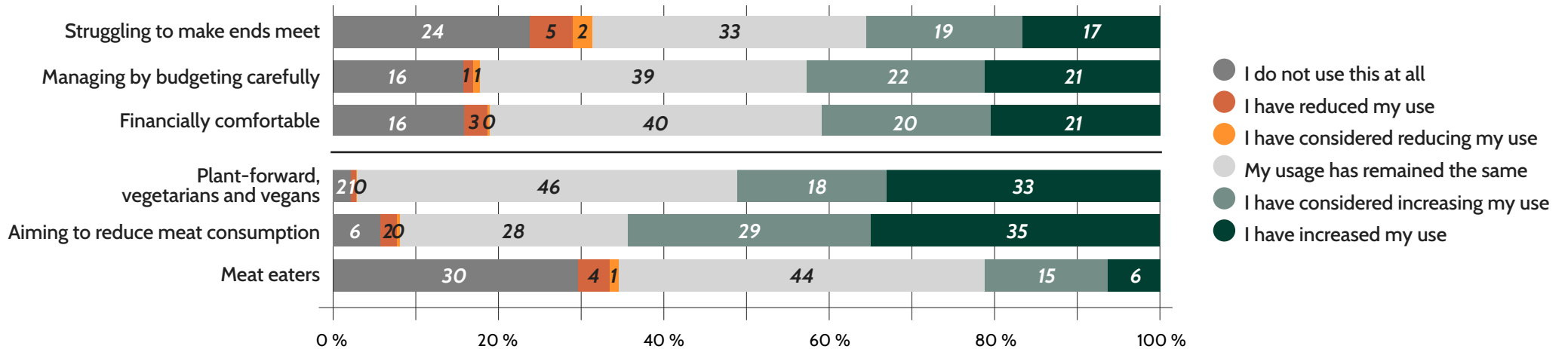
Fresh legumes are positioned as premium products within their category and are therefore particularly sensitive to economic fluctuations. The tightening financial situation of consumers is thus directly reflected in declining demand. The trend has been downward since 2019, during a period marked by economic uncertainty.

Due to their premium positioning, it is likely that the dietary guidelines have had only a limited impact on consumption within this specific segment.

Changes in purchasing behaviour over the past year



Changes in purchasing behaviour of plant protein ingredients (legumes, protein crumbles, etc.) over the past year



1.4. Non-dairy Products

Drinks

Plant-based drinks are the largest product segment in the overall plant-based food market, with a value of €76.2 million. In particular, plant-based drinks used in coffee have gained strong popularity in Finland and represent the most advanced stage of mainstream adoption, with regular use also among omnivores.

Among omnivores with no intention to reduce meat consumption, 43% report using plant-based milk-style products at least weekly. The corresponding figures are significantly lower for chilled plant-based protein products (5%) and legumes (18%).

According to the survey, users of milk-type products are particularly concentrated among women aged 25–39, two-thirds of whom use these products at least once a week.

Yogurts

Sales of plant-based yogurts declined notably in 2025. Purchases were approximately 6% lower than the previous year, and the market value decreased by 7%. This negative development occurred despite relatively positive attitudes towards increasing yogurt consumption observed in the survey.

Overall, 24% of respondents reported that they had increased or considered increasing their use of spoonable plant-based products during the past year, the highest segment-level figure within the non-dairy category. This suggests clear potential for growth; however, yogurts have not succeeded in attracting omnivores to the same extent as plant-based milk alternatives

Positive market potential is further supported by survey findings on recent purchasing behaviour: 24% of all respondents reported increasing or considering increasing their use of spoonable plant-based products, representing the largest segment-level change within the non-dairy category.

Cooking Products

Sales of plant-based cooking creams, crème fraîche alternatives, and fats used in cooking and baking grew by approximately 5%. Survey results indicate increasing consumer interest, particularly following the dietary guidelines, in butter-type products, which is also reflected in the sales data.

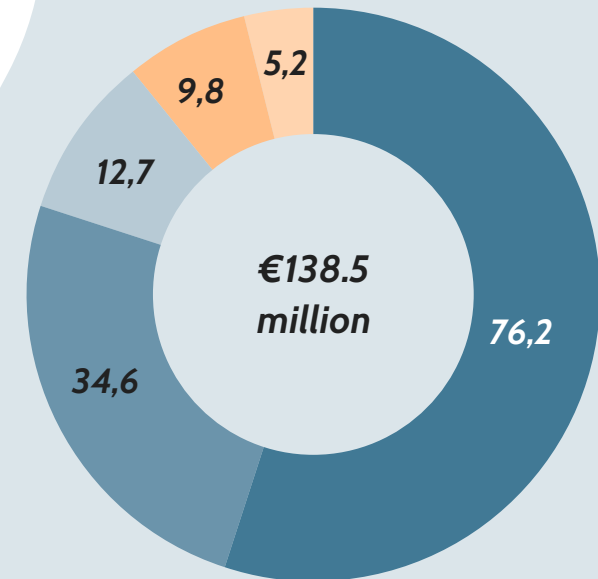
Cheese

The market for plant-based cheese remained at the level of the previous year. According to the survey, the user base for these products is the most limited among all major plant-based categories. Only 5% of

Change €
-1,4 %

Change vol.
+3,6 %

- Drinks, +2,6 % €
- Yogurts, -7,3 % €
- Cooking products, +5,3 % €
- Ice cream, -15,7 % €
- Cheese, -0,2 % €



43%

of omnivores not aiming to reduce meat consumption use plant-based milk-type products at least weekly.

respondents reported consuming them at least once a week, although usage is not limited to vegans (1%).

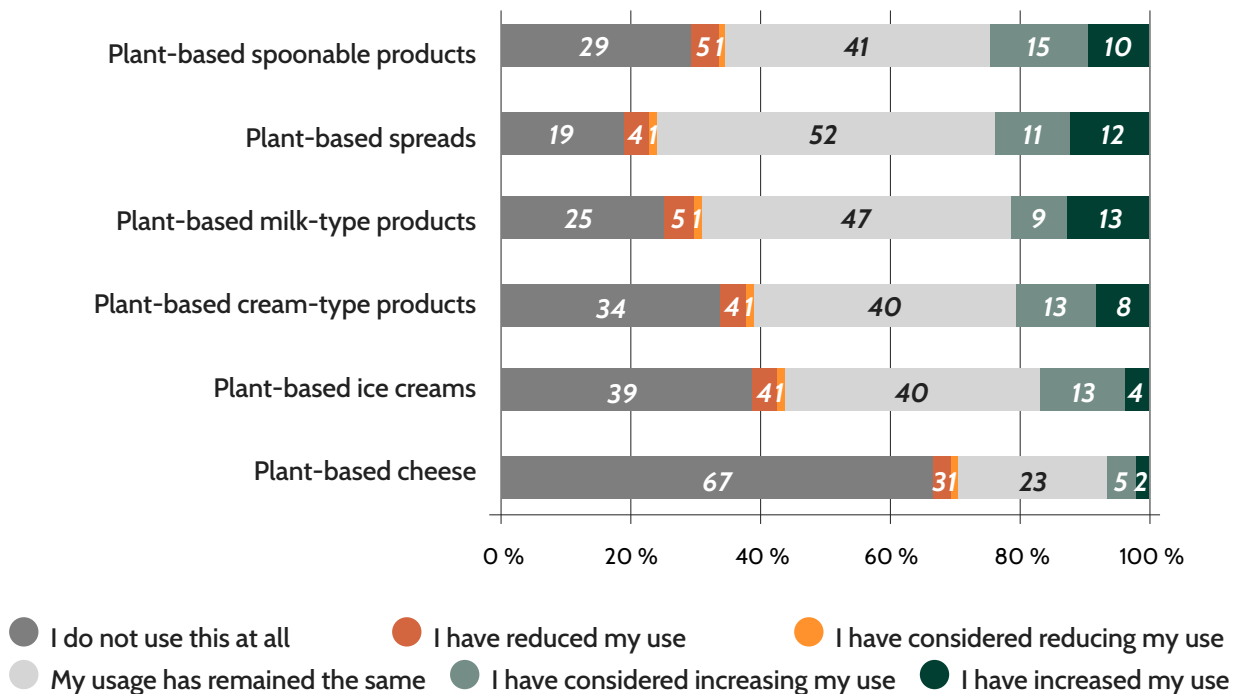
The most frequent users of plant-based cheese are those who also consume tofu and chilled plant-based protein products regularly: 34% of those consuming these products weekly also consume plant-based cheese at least once a week. Somewhat unexpectedly, men aged 16–39 reported higher consumption than women in the same age group.

Ice Creams

The retail market for take-home plant-based ice cream saw the introduction of new products from established, large-scale producers in 2025, often at lower price points than previously seen in the category. This helps explain the significant decline in market value (-16%), despite relatively stable consumption (-1%).

The entry of traditional players into the category suggests a process of market maturation and mirrors developments previously seen in the plant-based protein market in the early 2020s.

Changes in purchasing behaviour over the past year



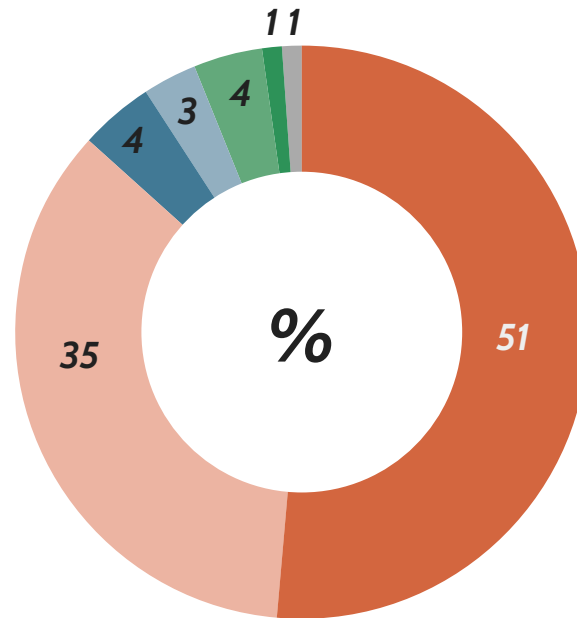
2. Consumer Trends

2.1. Dietary Patterns

The dietary patterns examined show only minimal changes compared to 2020. All shifts across dietary groups remain within a few percentage points, suggesting that the overall picture has remained largely unchanged.

This may be considered somewhat surprising, as the purchase of plant-based foods is showing moderate growth, and the sales data highlights particularly strong growth in certain categories, such as legumes. Similarly, a significant share of respondents reported having increased or considered increasing their use of plant-based products over the past year (plant protein ingredients, including legumes: 40%; chilled plant-based protein products: 33%), particularly following the dietary guidelines.

Taken together, the findings can be cautiously interpreted as indicating that the importance of strictly defined dietary identities is declining. This may create favourable conditions for the healthy growth of the plant-based food sector. For example, many consumers who actively use legumes still consider themselves omnivores and do not identify as following a plant-forward diet.



- I eat both meat and vegetables and am not trying to reduce my meat consumption.
- My diet includes meat, but I aim to increase plant-based foods while reducing my meat consumption.
- I mostly follow a plant-forward diet, but occasionally eat meat.
- Red meat is not part of my diet, but I eat poultry, fish or eggs.
- I am vegetarian; meat is not part of my diet, but I may consume dairy products or eggs.
- I am vegan; my diet does not include any animal-based products.
- Other



2.2. Frequency of Use

Plant-based Proteins vs. Meat

The share of consumers who have reduced or considered reducing their consumption of red meat over the past year is significant: 44%. This is considerably higher than for any other product occupying a similar place on the plate (poultry: 13%, plant-based protein ingredients: 4%). While some consumers have reduced their consumption of poultry, a larger group (20%) has increased it, resulting in an overall rise in poultry consumption according to the data. These shifts are likely explained by a transition in meat consumption, from red meat to white meat, and further towards plant-based foods.

The share of consumers eating chilled plant-based protein products on a monthly basis declined slightly in 2025 compared to 2022, although the data is not fully comparable due to changes in terminology. While attracting new users remains the primary objective for the category, there is also room to increase purchase frequency. The period under review coincides with a time of high inflation and rising living costs, which has posed challenges for the category.

Sales data shows a significant shift within the category over the past year, from mince and crumbles to pieces, strips, and chunks. In addition, the survey indicates that product dissatisfaction

is no longer a key barrier to use, which supports repeat purchases and future growth.

The use of legumes is considerably more widespread than that of chilled plant-based protein products, with two-thirds of respondents reporting monthly consumption. The survey also shows that 40% of respondents have increased or considered increasing their use of legumes over the past year, indicating a growing user base.

Non-dairy vs. Dairy products

The overall decline in milk consumption in Finland is also reflected in this survey: 18% of respondents reported having reduced or considered reducing their milk consumption. However, in terms of usage frequency, both milk and spoonable dairy products are still consumed daily by around half of the population.

The mainstreaming of plant-based drinks is evident, with one in four consumers now using them daily. In contrast, spoonable plant-based products are currently used daily by only 5% of consumers. The increasing everyday use of plant-based drinks is largely driven by products used in coffee.

The market potential remains significant: positive experiences with high-quality plant-based products may, over time, encourage consumers to expand their use to yogurts and other non-dairy categories.

Monthly users of chilled plant-based protein products

36%

(meat substitutes)

2017

48%

(plant-based protein products)

2022

43%

(chilled plant-based protein products)

2026

2.3. Demography

Diverging Trends Among Young Men and Women

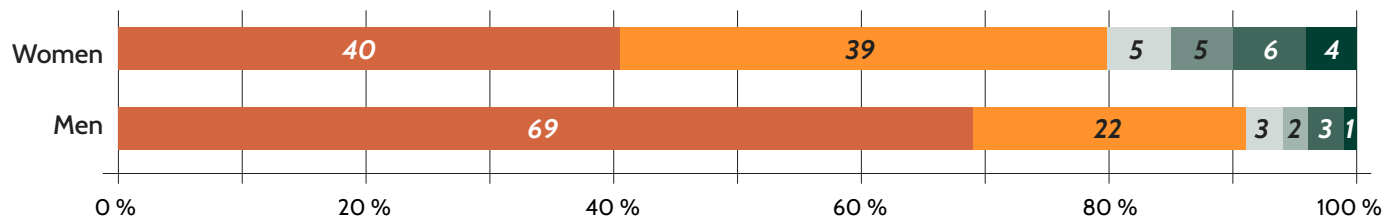
The survey results highlight a clear divergence among younger consumers. Men under the age of 25 show particularly positive attitudes towards meat and meat-based dishes, while women in the same

age group are key drivers of growth in plant-based food consumption.

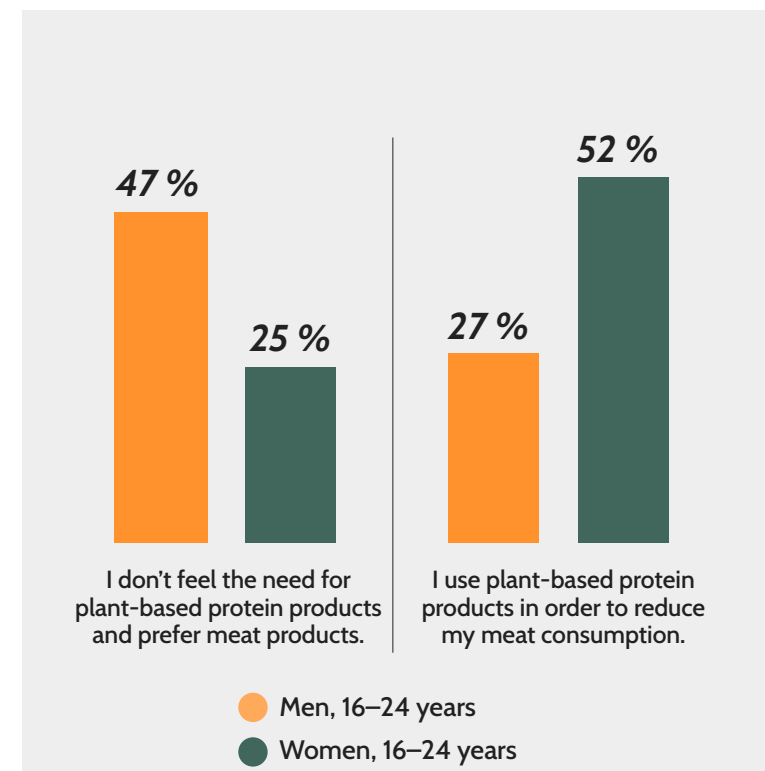
Among women, those under 25 are consistently the most positively inclined towards plant-forward eating. In contrast, among men, the under-25 age group is less favourable towards plant-forward eating than older age groups.

Men aged 16–25 are notably sceptical of plant-based foods, while women aged 26–39 show strong interest.

Dietary patterns among 16–24-year-olds



- I eat both meat and vegetables and am not trying to reduce my meat consumption.
- My diet includes meat, but I aim to increase plant-based foods while reducing my meat consumption.
- I mostly follow a plant-forward diet, but occasionally eat meat.
- Red meat is not part of my diet, but I eat poultry, fish or eggs.
- I am vegetarian; meat is not part of my diet, but I may consume dairy products or eggs.
- I am vegan; my diet does not include any animal-based products.



Urban vs. Rural

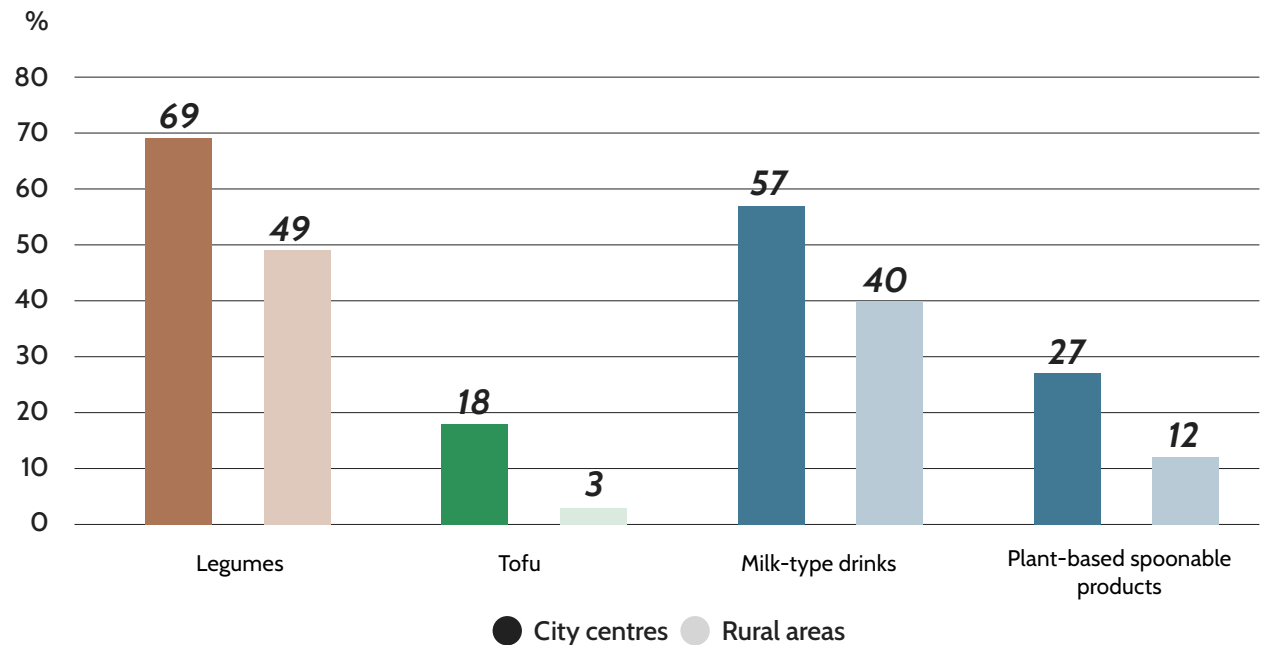
There is a significant difference between rural and urban areas both in attitudes towards plant-based food and in frequency of use. As many as 85% of respondents living in rural areas believe that meat is an essential part of the Finnish diet, compared to 64% among those living in city centres.

Perceptions of the healthiness of meat are particularly strong in rural areas. Slightly over half of respondents living in city centres consider plant-based food to be healthier than meat-based meals, whereas only 31% share this view in rural areas. Overall, these figures can be considered relatively low, especially given that public discussion around the dietary guidelines has strongly emphasised reducing meat consumption.

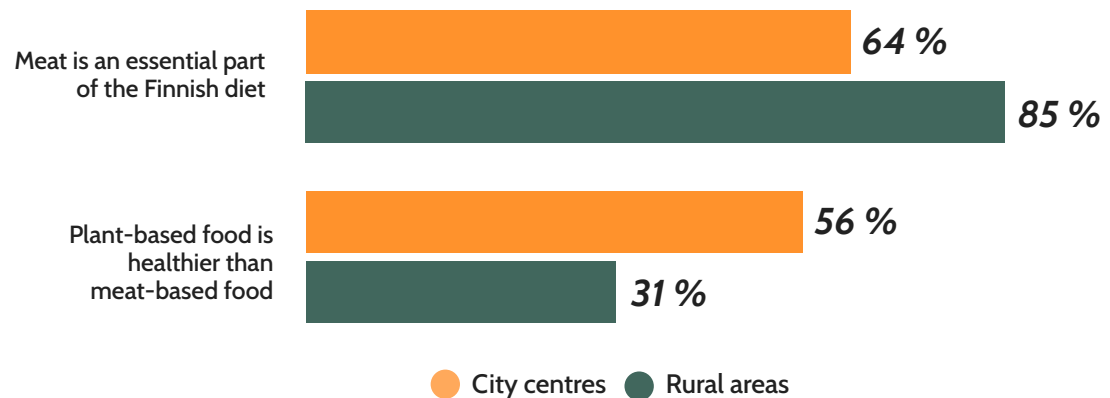
Consumption patterns should also be interpreted in light of availability. If the availability of plant-based foods in rural areas were similar to that in the Helsinki metropolitan area, this would likely influence consumption as well. Lower underlying demand in rural areas naturally results in more limited product ranges and less prominent in-store placement.

The importance of availability is particularly evident in the case of tofu consumption. Tofu is typically a standard option in urban lunch restaurants: nearly one in five residents of city centres consume tofu weekly, compared to just 3% in rural areas.

Share of respondents using at least weekly



Share of respondents agreeing with the statements



2.4. Attitudes

Polarisation and Divergence

Although sales of plant-based food have grown moderately across all categories over the past year, and the dietary guidelines have increased interest in plant-forward eating, attitudes towards plant-based food have somewhat weakened since 2022. At the same time, attitudes have become more polarised and divided. While a direct causal link is difficult to establish, this development coincides with a broader strengthening of conservative values in society

during the same period.

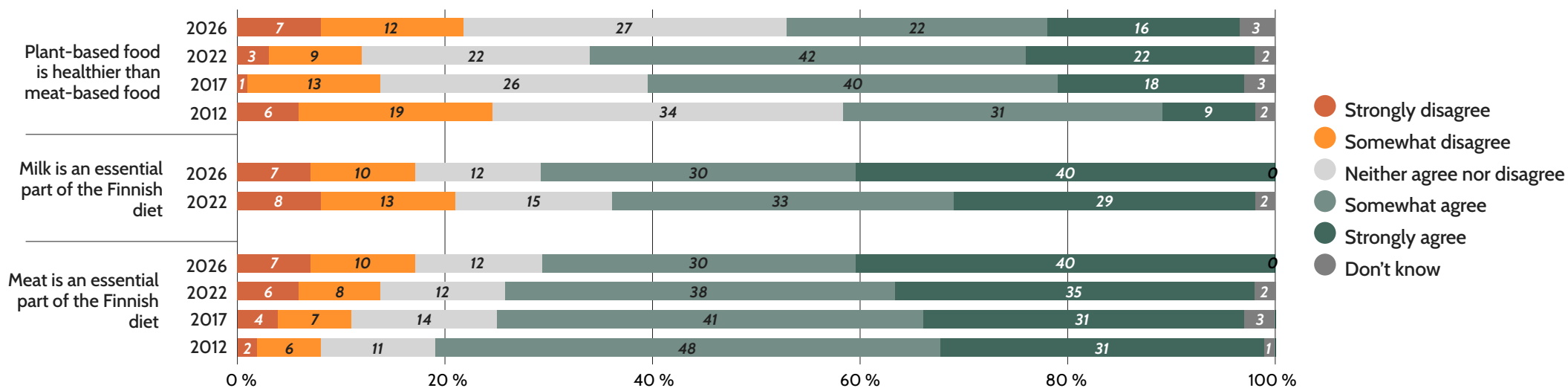
The position of meat as an essential part of the Finnish diet has gradually weakened since 2012. In 2012, 80% of respondents considered meat to be an essential part of the Finnish diet, compared to 70% in 2026. However, those who hold this view now tend to do so more strongly than before.

Somewhat surprisingly, perceptions of milk and dairy products as an essential part of the Finnish diet have strengthened over the past four years, despite declining consumption according to both official

statistics and this survey. This shift may be explained by the recent strong growth in cheese consumption, without plant-based cheese yet being widely perceived as a relevant alternative.

Perceptions of the healthiness of plant-based food relative to meat-based food strengthened steadily in surveys conducted between 2012 and 2022. However, since 2022 there has been a notable reversal: whereas previously 64% considered plant-based food to be healthier than meat-based food, the figure has now declined to 51%.

Comparison of statements over time (2012–2026)



The Processing Debate Reaches Finland

Public debate questioning the processing of foods has intensified globally in recent years. Its arrival in Finland is also reflected in the survey results. In 2020, 26% of respondents answered “don’t know” to the statement “Plant-based protein products are often too processed.” By 2026, the share of uncertain respondents had halved to 13%.

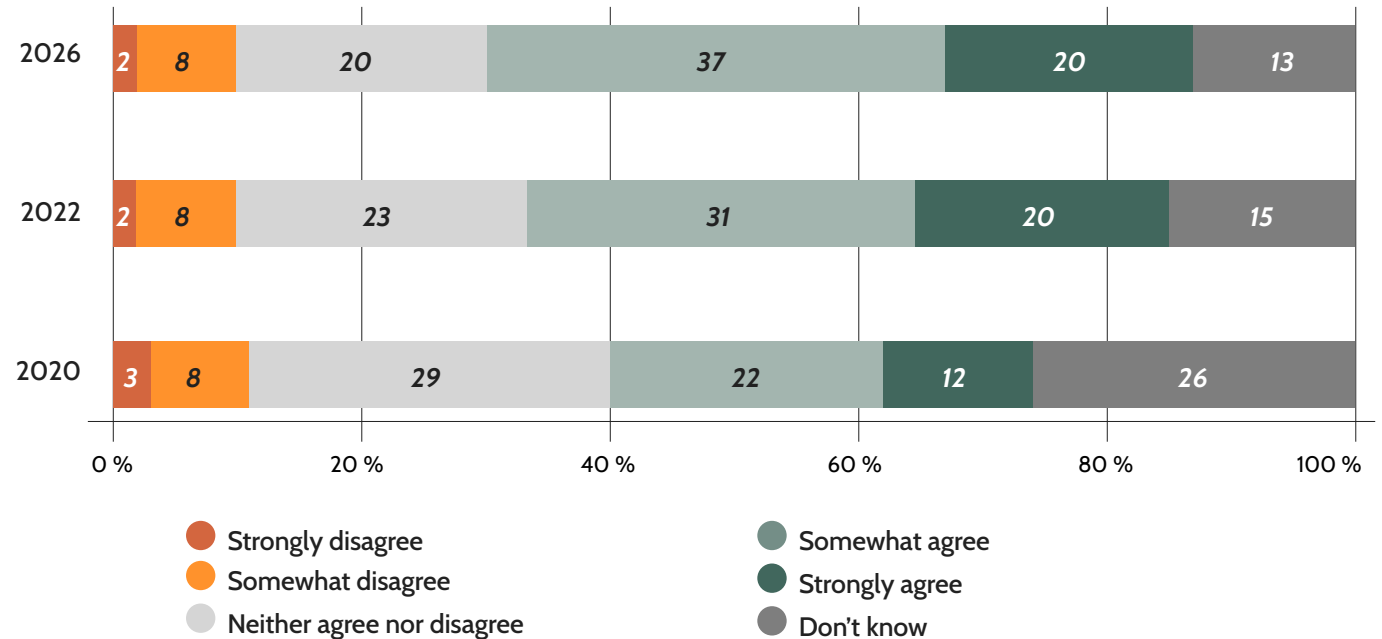
Over the same period, the share of respondents disagreeing with the statement has remained unchanged, while the share of those somewhat or strongly agreeing has increased significantly from 34% to 57%.

In early 2026, a citizens’ initiative to ban ultra-processed foods in school meals quickly reached the threshold of 50,000 signatures and is now proceeding to parliamentary consideration. The growing focus on food processing often based on questionable assumptions, poses a significant

challenge for the sector, even though it reflects genuine concerns about unhealthy eating. The classification systems underlying the debate on processing have been widely criticised within the

nutrition science community, as they do not take into account key aspects of food composition, such as fat quality or fibre content.

Plant-based protein products are often too processed



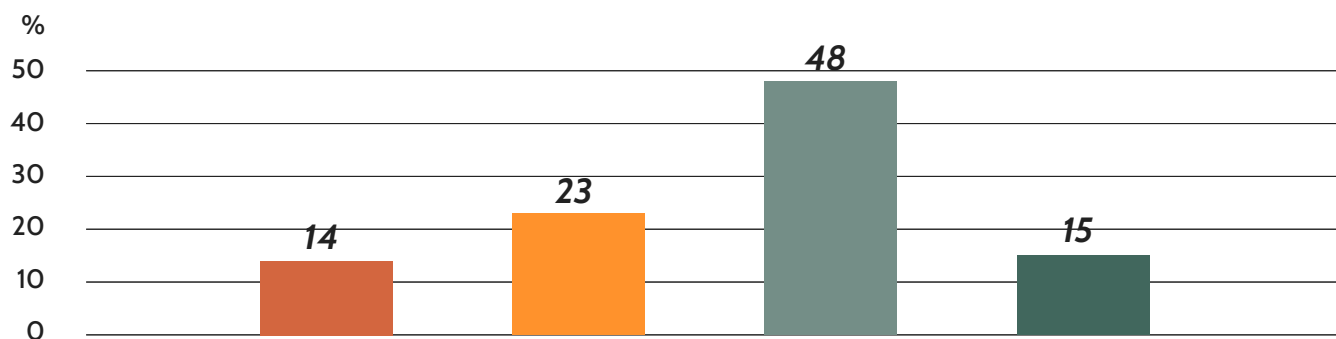
3. Impact of the Dietary Guidelines on Sales Development

3.1. The Guiding Effect of the Dietary Guidelines

According to the survey, 15% of respondents have made changes to their diets based on the dietary guidelines. As the primary purpose of the guidelines is not to directly influence consumers' conscious food choices, this level of reported change can be considered at least satisfactory.

Although the question does not capture the magnitude of these changes, a group representing 15% of respondents, approximately 600,000 people, already contributes significantly to demand for plant-based food. In total, 39% of respondents report that the dietary guidelines have increased their interest in plant-based foods. This effect is particularly pronounced among those aiming to reduce meat consumption (59%).

Have the new dietary guidelines influenced your food choices over the past year?



- I have not heard of the new dietary guidelines
- I have heard of the new dietary guidelines, but I do not know their content in detail or they have not influenced my food choices
- I am familiar with the dietary guidelines at least at a general level, but they have not influenced my food choices
- I am familiar with the dietary guidelines and have made changes to my food choices based on them

Dietary guidelines in public debate

The updated national dietary guidelines, published in November 2024, sparked an exceptionally active public debate. In particular, what came to be known as the “cold cuts uproar” gained significant media attention, as the guidelines were largely interpreted through the lens of restrictions and prohibitions. The recommendation to adopt a more plant-forward diet, especially by increasing the consumption of legumes, also received some media coverage. The debate quickly became polarised, and the content of the guidelines was widely discussed in news media, opinion pieces, and social media.

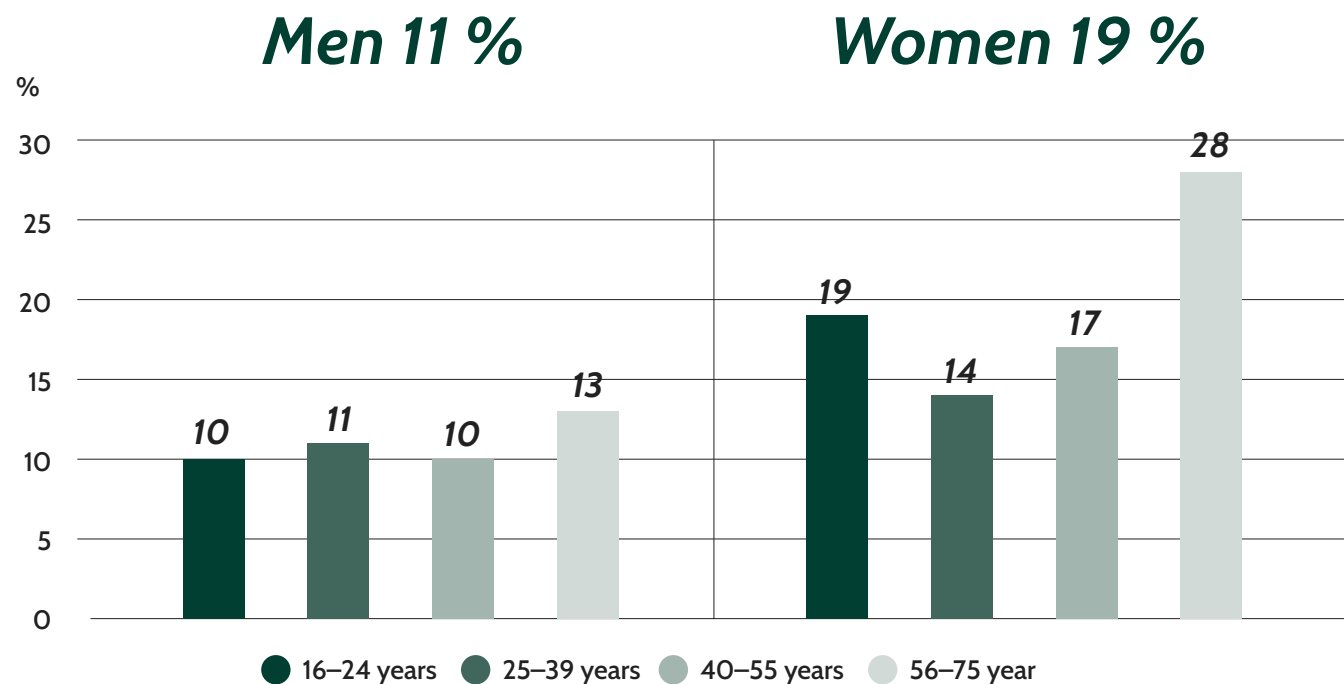
The guidelines were developed by the National Nutrition Council and are based on scientific evidence. Their primary aim is to guide public food services and food industry product development towards healthier and more sustainable choices. No dedicated consumer-facing communication campaign was conducted during 2024–2025, meaning that the effects observed in the survey are largely driven by media coverage and broader public discussion.

At the same time, it is clear that the influence of the dietary guidelines is limited. Nearly half of respondents report being familiar with their content at a general level, yet have not made changes to their diets. This is consistent with the broader observation that increased information alone tends to have only a limited impact on changing habits and behaviours.

At the same time, even those who have not made conscious changes to their diets may have moved in line with the guidelines indirectly, for example, through changes in the offerings of workplace restaurants.

The impact of the dietary guidelines has also been strongly gendered. Women reported making changes nearly twice as often as men. Respondents aged over 55 were overrepresented in both groups, with as many as 28% of women in this age group reporting changes based on the guidelines.

I am familiar with the dietary guidelines and have made changes to my food choices based on them



3.2. Changes Following the Dietary Guidelines

The sharp increase in legume sales observed in the sales data (in volume terms: frozen +7%, canned +13%) appears to originate from the dietary guidelines. A majority of those who reported making changes to their diets based on the guidelines also reported increasing their consumption of legumes. The increase in consumption seems to have been concentrated specifically on legumes, likely due to the category's familiarity and accessibility. In addition, around two-thirds of this same group

reported increasing their consumption of vegetables and salads more generally.

Media coverage of the dietary guidelines placed strong emphasis on reducing and avoiding red meat and processed meat products, particularly cold cuts. While many respondents reported reducing their consumption of cold cuts as a result of the guidelines, this has not been reflected to a similar extent in increased use of plant-based sandwich toppings. Likewise, the emphasis on plant-forward eating in the guidelines has had little to no impact on the consumption of plant-based cheese.

Among those who have made changes to their diets based on the dietary guidelines

INCREASED		REDUCED	
Vegetables, salads, berries and fruits	64 %	Meat	69 %
Legumes (e.g. lentils, beans, peas)	61 %	Cold cuts	63 %
Plant-based spreads	26 %	Hard fats (dairy products and meat products)	50 %
Plant-based drinks	21 %	Dairy products	16 %
Spoonable products	16 %		
Chilled plant-based protein products	15 %		
Plant-based ready meals and convenience foods	15 %		
Plant-based sausages and sandwich toppings	6 %		
Plant-based cheese	2 %		



From Intention Towards Action in Healthier Eating

The survey results suggest that the dietary guidelines have been particularly effective as a policy tool among those who had already been aiming to reduce their consumption of red meat. More than one quarter of this group reported making changes to their food choices based on the guidelines. In addition, as many as 59% of those considering reducing meat consumption report that the guidelines have increased their interest in plant-based products. In this sense, official guidance appears to have helped turn intentions into action and encouraged movement towards dietary change.

At the same time, respondents do not generally perceive that their diets have changed significantly. Instead, it appears that omnivorous diets now simply include more legumes and other plant-based products than before. As a result, the boundary between meat-based and plant-forward diets may be becoming less distinct, which can be seen as a positive development.

I am familiar with the dietary guidelines and have made changes to my food choices based on them

4 %

Meat eaters

28 %

Aiming to reduce meat consumption

26 %

Plant-forward, vegetarians and vegans

The dietary guidelines have increased my interest in using plant-based products

24 %

Meat eaters

59 %

Aiming to reduce meat consumption

45 %

Plant-forward, vegetarians and vegans

Appendix 1: Sales Data

Retail sales data for plant-based products: 2025 vs. 2024

	2024		2025		2025 vs. 2024	
	Sales M€ (excl. VAT)	Sales volume 1 000 kg	Sales M€ (excl. VAT)	Sales volume 1 000 kg	Change (€)	Change (vol.)
TOTAL PLANT-BASED PRODUCTS	244,25	66 545	244,41	68 929	0,1%	3,6%
1 Plant-based Food Products	80,57	8 433	81,91	8 695	1,7 %	3,1 %
1.1 Plant-based mince and crumbles	4,76	399	4,19	332	-12,1 %	-16,8 %
1.2 Plant-based pieces, strips, chunks and pulled products	5,20	375	6,09	453	17,1 %	20,7 %
1.3 Tofu and tempeh	11,52	1 422	12,84	1 596	11,4 %	12,3 %
1.4 Plant-based patties and burgers	4,46	376	4,85	405	8,8 %	7,5 %
1.5 Plant-based balls, nuggets and sticks	7,44	712	6,54	621	-12,1 %	-12,7 %
1.6 Plant-based hot dogs and sausages	5,16	379	5,23	366	1,4 %	-3,4 %
1.7 Plant-based sandwich toppings	8,21	633	8,89	679	8,3 %	7,3 %
1.8 Plant-based ready meals	28,20	2 902	27,27	2 908	-3,3 %	0,2 %
1.9 Plant-based dried crumbles and pieces	2,09	252	2,43	279	16,3 %	10,6 %
1.10 Plant-based canned food products	3,52	982	3,57	1 055	1,4 %	7,4 %
2 Legumes	23,25	6 169	24,04	6 447	3,4 %	4,5 %
2.1 Fresh legumes	7,36	994	6,44	801	-12,5 %	-19,4 %
2.2 Frozen legumes	5,12	1 499	5,84	1 610	13,9 %	7,4 %
2.3 Dried legumes	3,11	970	3,16	965	1,5 %	-0,5 %
2.4 Canned legumes	7,65	2 706	8,60	3 070	12,3 %	13,5 %
3 Non-dairy Products	140,43	51 943	138,46	53 787	-1,4%	3,6%
3.1 Plant-based drinks	74,28	40 105	76,23	42 219	2,6 %	5,3 %
3.2 Plant-based cooking products	12,04	2 493	12,68	2 686	5,3 %	7,7 %
3.3 Plant-based cheese	5,24	387	5,23	393	-0,2 %	1,6 %
3.4 Plant-based yogurts	37,30	7 821	34,58	7 363	-7,3 %	-5,9 %
3.5 Plant-based ice creams	11,57	1 137	9,76	1 126	-15,7 %	-1,0 %

Appendix 2: Category Structure

1 PLANT-BASED FOOD PRODUCTS

1.1 Plant-based mince and crumbles

- 1.1.1 Mince and crumbles
- 1.1.2 Frozen mince and crumbles

1.2 Plant-based pieces, strips, chunks and pulled products

- 1.2.1 Pieces, flakes, strips and pulled products
- 1.2.2 Frozen pieces, flakes, strips and pulled products

1.3 Tofu and tempeh

- 1.3.1 Tofu
- 1.3.2 Tempeh

1.4 Plant-based patties and burgers

- 1.4.1 Patties and cutlets
- 1.4.2 Frozen patties and cutlets

1.5 Plant-based balls, nuggets and sticks

- 1.5.1 Balls
- 1.5.2 Falafel
- 1.5.3 Nuggets and sticks
- 1.5.4 Frozen balls, nuggets and sticks

1.6 Plant-based hot dogs and sausages

- 1.6.1 Sausages
- 1.6.2 Hot dogs

1.7 Plant-based sandwich toppings

- 1.7.1 Cold cuts
- 1.7.2 Hummus and pâtés

1.8 Plant-based ready meals

- 1.8.1 Ready meals
- 1.8.2 Snacks (burgers, hot dogs, etc.)
- 1.8.3 Frozen ready meals
- 1.8.4 Meal components

1.9 Plant-based dried crumbles and pieces

- 1.9.1 Dried crumbles
- 1.9.2 Dried pieces and strips

1.10 Plant-based canned food products

- 1.10.1 Shelf-stable ingredients
- 1.10.2 Shelf-stable meals

2 LEGUMES

2.1 Fresh legumes

2.2 Frozen legumes

2.3 Dried legumes

2.4 Canned legumes

3 NON-DAIRY PRODUCTS

3.1 Plant-based drinks

- 3.1.1 Oat drinks (unflavoured)
- 3.1.2 Soy drinks (unflavoured)
- 3.1.3 Other drinks (unflavoured)
- 3.1.4 Flavoured plant-based drinks
- 3.1.5 Plant-based coffee creamers
- 3.1.6 Protein drinks

3.2 Plant-based cooking products

- 3.2.1 Oat-based cooking creams
- 3.2.2 Other plant-based cooking creams
- 3.2.3 Plant-based creams for baking
- 3.2.4 Plant-based fraîche products
- 3.2.5 Plant-based fats

3.3 Plant-based cheese

- 3.3.1 Sliced cheese alternatives
- 3.3.2 Grated cheese alternatives
- 3.3.3 Fresh cheese alternatives
- 3.3.4 Feta-, chèvre- and blue cheese-style alternatives
- 3.3.5 Other cooking cheese alternatives

3.4 Plant-based yogurts

- 3.4.1 Oat-based yogurts
- 3.4.2 Other plant-based yogurts
- 3.4.3 Dessert puddings and quark alternatives
- 3.4.4 Protein puddings and quark alternatives

3.5 Plant-based ice creams

- 3.5.1 Ice cream sticks, cones and cups
- 3.5.2 Take-home packs

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FRIIDU

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FOODS

HAPPY PLANT
PROTEIN

HERNIS

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LEIPURIN.

LIDL

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MILK

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OAT
LY!

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Ruokailo

Sevan

S

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FURTHER
INFORMATION:
info@provege.fi

Jukka Kajan
Executive Director
+358 50 467 4740
jukka.kajan@provege.fi

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Page design: Seidi Guzejev | Pictures: Kukka Rosenlund

www.provege.fi

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