



Plant-Based Report

**Trends and Changes in Australia's
Plant-Based Food Market**



TABLE OF CONTENTS

Introduction	03
The Audit	05
What is a Plant-Based Product?	05
Plant-Based Categories	05
Key Findings	06
Nutrient Analysis	07
Protein	07
Soy vs Pea	08
Dietary Fibre	09
Sodium	10
Saturated Fat	11
Sugar	12
Fortification	13
Health Star Rating	15
Plant-Based Themes	16
The ‘Proteinification’ of Food	16
Health-Driven Messaging	17
Sustainable Diet	18
Ultra-Processing	19
Concluding Remarks	20
References	21
About Grains and Legumes Nutrition Council	24



Introduction

As consumers become increasingly conscious of how food choices affect their health and the environment, plant-based eating is gaining prominence. This transition is driven by health concerns^{1,2}, growing awareness of the environmental impact of food choices³, ethical considerations⁴ and the increased availability and affordability of plant-based food options.

A growing body of research highlights the positive impact of plant-rich diets on planetary and human health⁵. A plant-rich diet, characterised by a high intake of vegetables, fruit, legumes, nuts, seeds and whole grains, is associated with a reduced risk of cardiovascular disease, type 2 diabetes and colorectal cancer^{1,2}. These foods are naturally nutrient-dense, providing dietary fibre, essential vitamins and minerals, and have anti-inflammatory properties⁶. From an environmental perspective, plant-rich diets offer significant benefits due to their lower carbon footprint and reduced demand for natural resources⁷.

In response to this evidence, many international dietary guidelines have begun shifting toward more plant-based dietary patterns. Countries such as Sweden⁸, Austria⁹ and Canada¹⁰ now encourage increased consumption of plant-based foods. Notably, there is a growing emphasis on diversifying protein sources, with plant-based proteins increasingly prioritised in public health recommendations.

As the Australian Dietary Guidelines are under review, there is an opportunity to reflect the evolving evidence and consider whether the current food supply supports these shifting dietary patterns.





In Australia, 21% of adults report reducing their meat intake¹¹, and a growing number now identify as flexitarian¹². These changes influence the food industry, prompting manufacturers to reformulate and expand their offerings to meet changing consumer preferences. While interest in plant-based options grow, taste, texture, and familiarity remain critical to consumer acceptance. Even highly nutritious products may struggle in the market if they don't meet consumer expectations around flavour and overall eating experience¹³.

This report builds on the Grains and Legumes Nutrition Council's (GLNC) 2022 audit of plant-based supermarket products, exploring how the availability, composition, and on-pack claims have evolved in major Australian supermarkets. By examining these shifts, the report assesses how well current offerings reflect growing consumer demand and broader nutrition and sustainability trends.





The Audit

The Grains & Legumes Nutrition Council (GLNC) conducted an audit of plant-based products in November 2024, across four major retailers (Coles, Woolworths, Aldi, and Independent Grocers of Australia) in metropolitan Sydney, Australia.

The last plant-based audit GLNC conducted took place in 2022. The audit tracks category changes over the two years and analyses the nutritional composition, ingredients and packaging claims displayed on pack.

What is a Plant-Based Product?

A plant-based product is made from plant sources such as fruits, vegetables, grains, legumes, nuts and seeds, and may vary in its level of processing¹⁴.

Plant-Based Categories

The 2024 plant-based audit includes the following categories:

- Plant-based meat alternatives (PBMA): burger patties, sausages, butcher cuts, mince and deli-style meats.
- Plant-based milk: grain-based (oat and rice milk), legume-based (soy milk), nut-based (almond milk), coconut-based and mixed milk (combination of plant-based ingredients).
- Plant-based dairy alternatives: cheese, yoghurt and cream.
- Plant-based meals: fresh salads, ready meals, savoury pies and pastries.





Key Findings

There are 487 plant-based products across the following plant-based categories:

153 plant-based meat alternatives

139 plant-based milks

107 plant-based dairy alternatives

88 plant-based ready meals

There are 33% fewer plant-based products available compared to 2022.

- 51% decline in plant-based meat alternatives.
- 22% decrease in plant-based milks.
- 7% increase in plant-based dairy alternatives.
- 32% decrease in plant-based ready meals.



Nutrient Analysis

Protein

Protein plays an important role in the growth and repair of muscles, acting as building blocks for tissues and organs within the body¹⁵.

Did you know?

In the current Australian Dietary Guidelines, pulses and legumes are recommended in the protein and vegetable food groups. They are a unique and valuable protein source, offering protein, dietary fibre, iron, and essential vitamins that support overall health and well-being¹⁶.

The overall average protein content of PBMA remained relatively consistent over the two years with over half (58%) of PBMA being a 'good source of protein' ($\geq 10\text{g}$ per serve).

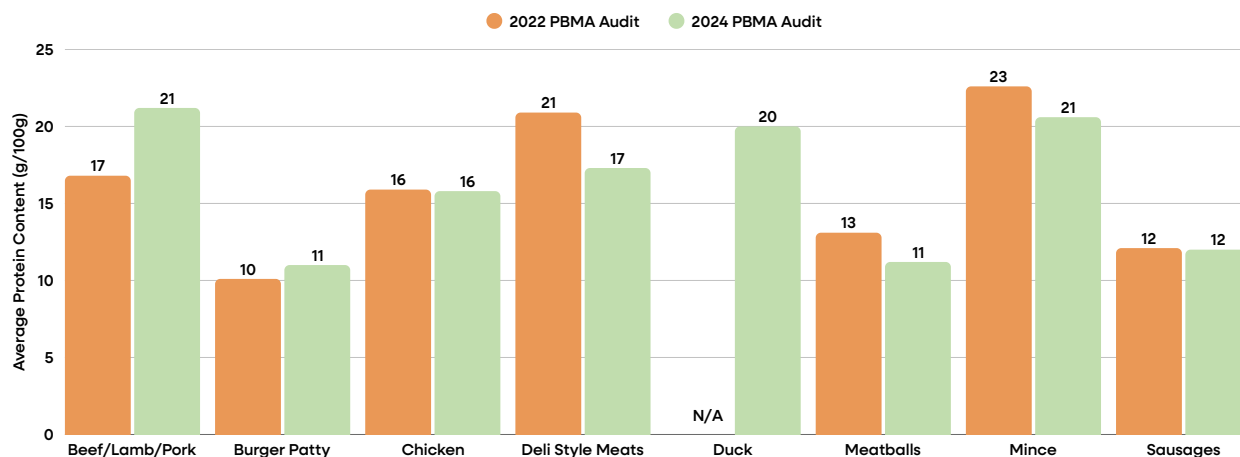


Chart 1: Comparison of average protein content of plant-based meat alternatives from 2022 to 2024.

- The average protein of grain milk increased by 10% from 2022 to 2024. Soy milks contain, on average, four times more protein than other plant-based milks.
- The average protein content of plant-based cheese in 2024 was five times higher than in 2022, as one-quarter of cheeses were made from nuts.
- The majority (82%) of plant-based meals were a 'good source of protein' ($\geq 10\text{g}$ per serve).



Soy vs Pea

Whole proteins are naturally occurring proteins found in whole pulses. They remain within the natural matrix, alongside carbohydrates, fats, and dietary fibre, and are typically consumed through foods like legumes. In contrast, protein isolates are extracted from whole pulses through various processes, resulting in a concentrated protein product commonly used in plant-based meat and dairy products¹⁷.

Plant-based products often use soy or pea isolates to increase the protein content and improve the nutritional value of products. Both soy and pea contain all essential amino acids and offer good digestibility¹⁸, making them popular alternatives to animal-based proteins.

Commercial soy isolates are generally higher in protein¹⁹, more widely available and cheaper to produce²⁰. In contrast, pea protein isolates, while slightly lower in protein, are lower in allergens and free from genetically modified organisms (GMO)²¹.

Although plant-based proteins like soy and pea isolates are excellent sources of essential amino acids, anti-nutrients in plant-based foods remain a health consideration. Anti-nutrients are natural substances produced by plants that can interfere with the digestion, absorption or utilisation of nutrients in food²². At low levels, some anti-nutrients such as phytates may offer health benefits, including improved blood sugar control, reduced cholesterol, and potential cancer protection²². Modern food processing techniques can significantly reduce anti-nutrient levels, improving the digestibility and nutritional quality of plant protein isolates²³.

Over one-quarter (28%) of plant-based products used protein isolates, most commonly soy (22%).

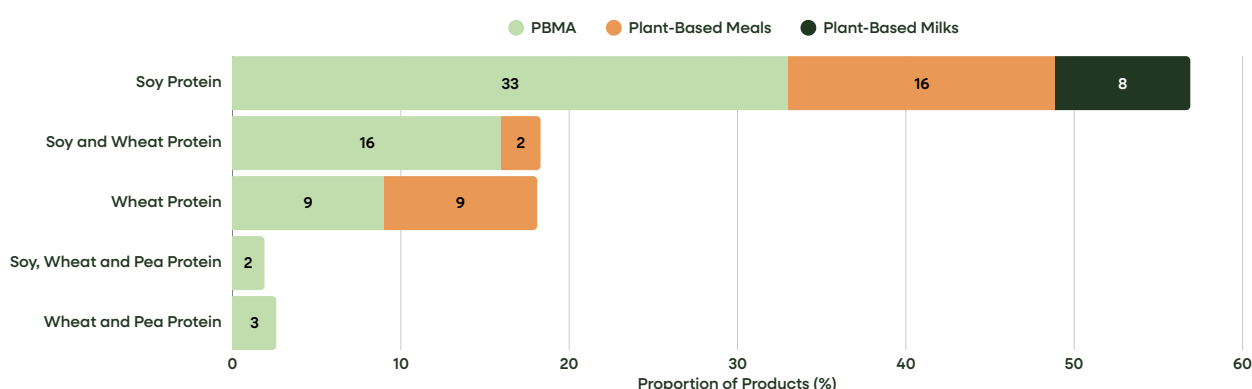


Chart 2: The proportion of protein isolates used in 2024.

- The proportion of plant-based meat alternatives using protein isolates increased by 12% over two years.
- The proportion of plant-based products using pea protein decreased by 55%.



Dietary Fibre

Dietary fibre plays a crucial role in the healthy functioning of the gut, lowering blood cholesterol and reducing the risk of chronic diseases²⁴. Despite these benefits, only 28% of Australians meet the minimum fibre requirements²⁵.

Did you know?

The Australian Guide to Healthy Eating recommends consuming 25-30g of fibre per day. Consuming plant-based foods containing grains and legumes can contribute towards meeting daily fibre requirements and improving overall gut health²⁴.

The average dietary fibre of plant-based meat alternatives decreased by 13% over two years, with plant-based mince products having the greatest decrease (49%). Over one-third (38%) of plant-based meats are a 'good source of fibre' (≥ 4 - < 7 g per serve).

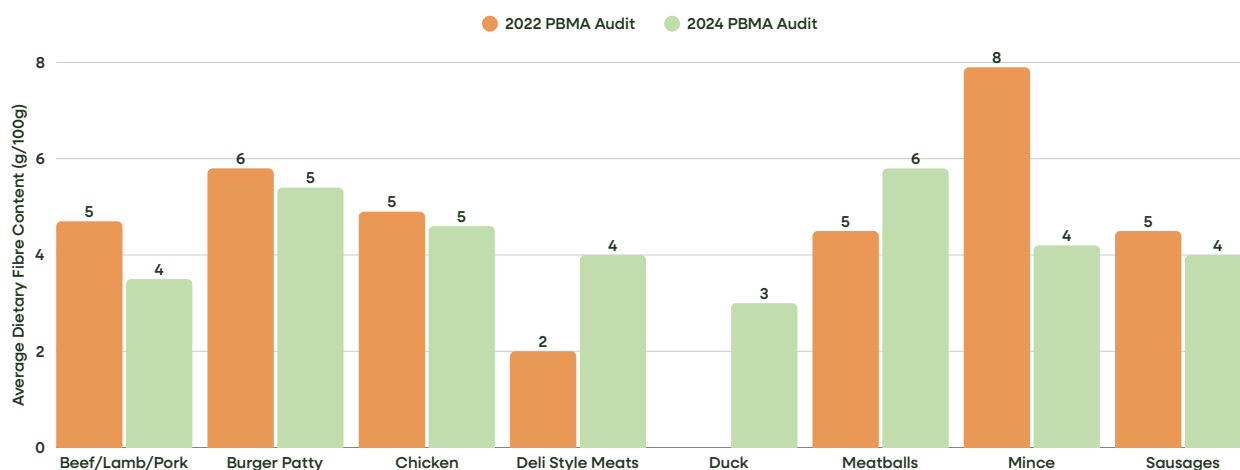


Chart 3: Comparison of average dietary fibre content of plant-based meat alternatives from 2022 to 2024.

- Burger patties made from legumes, grains, or vegetables contain 50% more dietary fibre than those made with protein isolates.
- The average fibre content of plant-based milk increased by 15% since 2022, with the greatest increase amongst nut milks (71%).
- The addition of oat fibre in plant-based cheeses provided the greatest fibre content.
- Vegetable-based savoury pies and pastries were 34% higher in dietary fibre than protein isolate-based savoury pies and pastries.



Sodium

Sodium is added to packaged products for taste, texture, and preservation²⁶, however excess sodium intake can increase the risk of chronic diseases such as hypertension²⁷.

The average sodium content of savoury pies and pastries decreased by 11% over two years, however only one plant-based ready meal was classified as 'low in sodium' ($\leq 120\text{mg}$ per 100g).

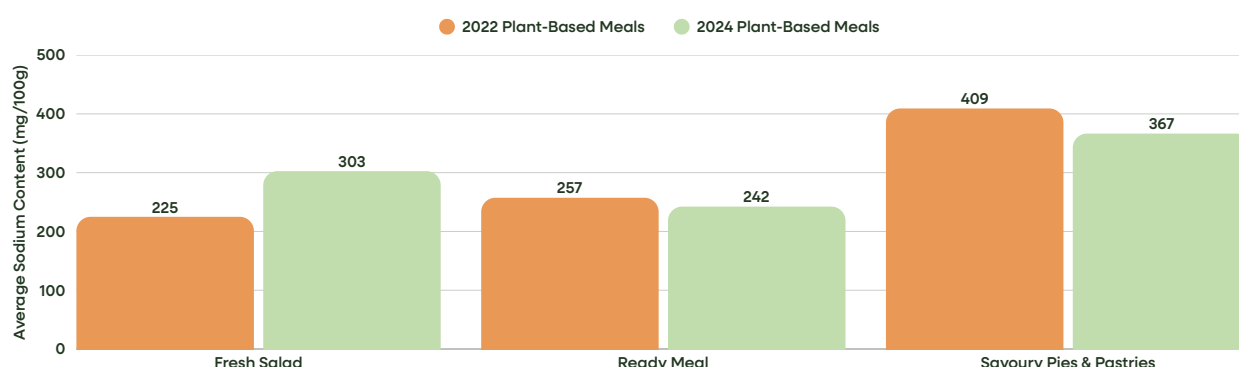


Chart 4: Comparison of average sodium content of plant-based ready meals from 2022 to 2024.

- The overall average sodium content of PBMA's increased by 16% over two years, with mince products having the greatest increase (93%).
- The average sodium content of nut and grain milk decreased by 19% and 14% respectively from 2022.
- Cheese was the only dairy alternative to have a decrease in average sodium content (6%).





Saturated Fat

The Australian Guide to Healthy Eating advises limiting the intake of saturated fats in the diet, as excessive consumption is associated with an increased risk of cardiovascular disease and elevated cholesterol levels²⁸.

Did you know?

Fats, such as coconut oil, contain favourable properties in terms of taste and texture, creating a desirable mouthfeel for plant-based products. Although coconut is predominantly made up of saturated fat, and dietary guidelines recommend limiting saturated fat to reduce the risk of heart disease, not all saturated fats behave the same metabolically^{29,30}.

The overall average saturated fat content of plant-based dairy alternatives increased from 2022 to 2024, where plant-based creams had the greatest increase of 42%. One in 10 plant-based dairy alternatives are considered 'low in saturated fat' (≤ 1.5 g per 100g).

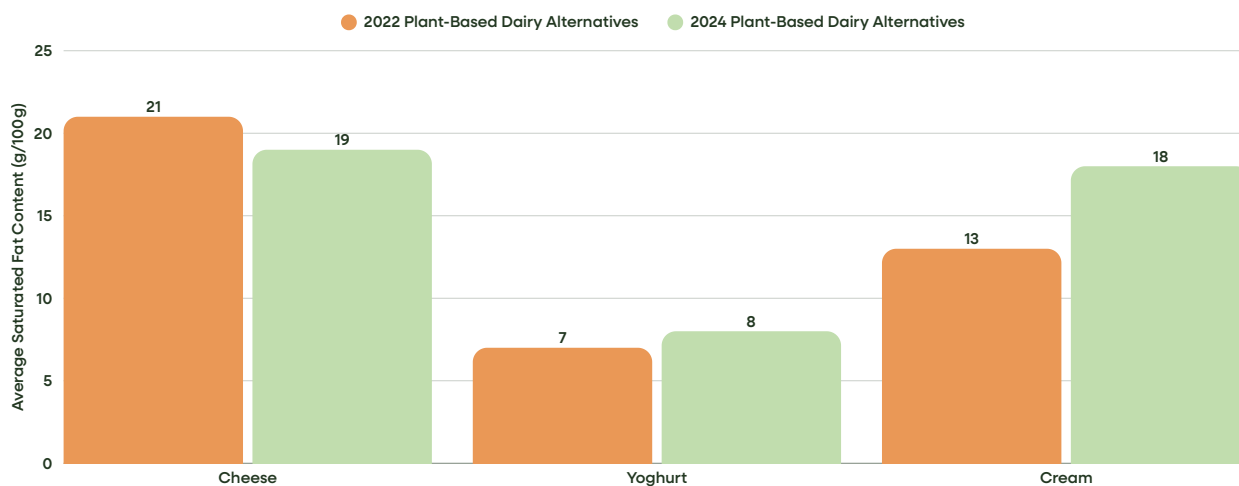


Chart 5: Comparison of average saturated fat content of plant-based dairy alternatives from 2022 to 2024.

- The average saturated fat of plant-based meat alternatives decreased by 19% over two years, with nearly two-thirds (64%) of all products classified as 'low in saturated fat' (≤ 1.5 g per 100g).
- The average saturated fat content for nut milks decreased by 26% over the two years.
- The average saturated fat of plant-based savoury pies and pastries increased by 22% and is four times higher than that of other plant-based ready meals.



Sugar

Sugars are carbohydrates found in foods, including fruits, vegetables, and dairy. Intrinsic sugars occur naturally within whole foods like fruits and vegetables. Free sugars, also called added sugars, such as fructose, honey, and fruit syrups, are often added to foods and drinks to enhance sweetness³¹.

Of the top-selling non-flavoured plant-based milks, 76% are 'low in sugar'.*

Of all non-flavoured plant-based milks, grain-based milks, which contain naturally occurring sugars, had the highest sugar content, whereas nut milks had the lowest. Less than two-thirds (64%) of non-flavoured plant-based milks were 'low in sugar' ($\leq 2.5\text{g}$ per 100mL).

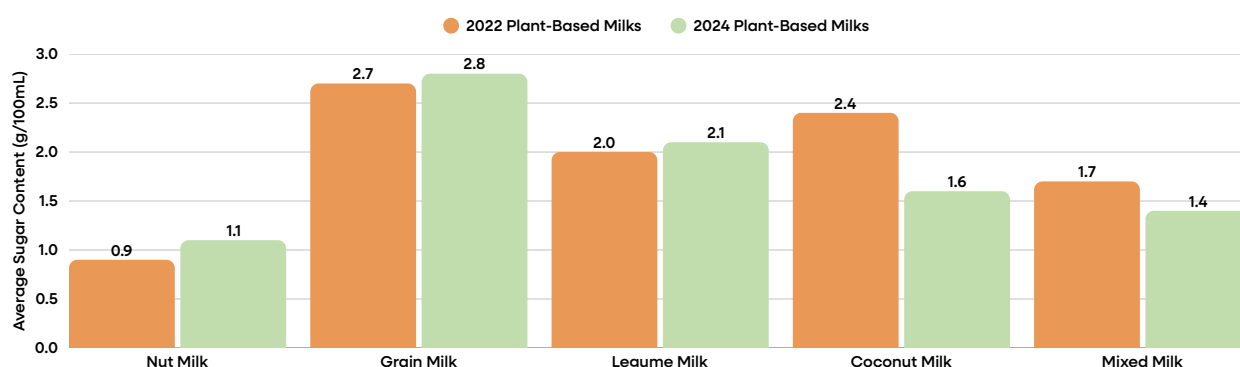


Chart 6: Comparison of the average sugar content of non-flavoured plant-based milks from 2022 to 2024.

- From 2022 to 2024, flavoured plant-based milk decreased by 53%, with grain-based milks having the highest proportion of flavoured products, accounting for nearly 1 in 10 products.
- The average sugar content of plant-based meat alternatives from 2022 decreased by 10%, with deli-style meats having the greatest decrease (45%).
- The sugar content of all plant-based dairy alternatives increased, with cheeses containing 3.6 times more sugar than in 2022.
- There was a 13% decrease in sugar among plant-based meals.

* Top-selling reflects the top 75% units sold in this period* Sales data provided by Sanitarium, based on NielsenIQ Scantrack for the UHT Milk & Chilled NDM Milk (excluding flavoured milks) segment for the 52-week period ending 19/11/2024, Australia Grocery channel. Copyright © 2025, NielsenIQ.



Fortification

Plant-Based Meat Alternatives

Plant-based products are often fortified to help address nutrient shortfalls in plant-based dietary patterns, incorporating key nutrients such as vitamin B12, iron, vitamin D, calcium, iodine and zinc. The products aim to preserve the naturally-occurring benefits of plant-based ingredients including fibre, protein, antioxidants and polyphenols^{32,33}. This approach ensures that plant-based alternatives meet essential nutrient needs while providing the additional health benefits of plant foods.

The proportion of fortified plant-based meats increased by 75% over two years, making up one-third of all plant-based meat products in 2024.

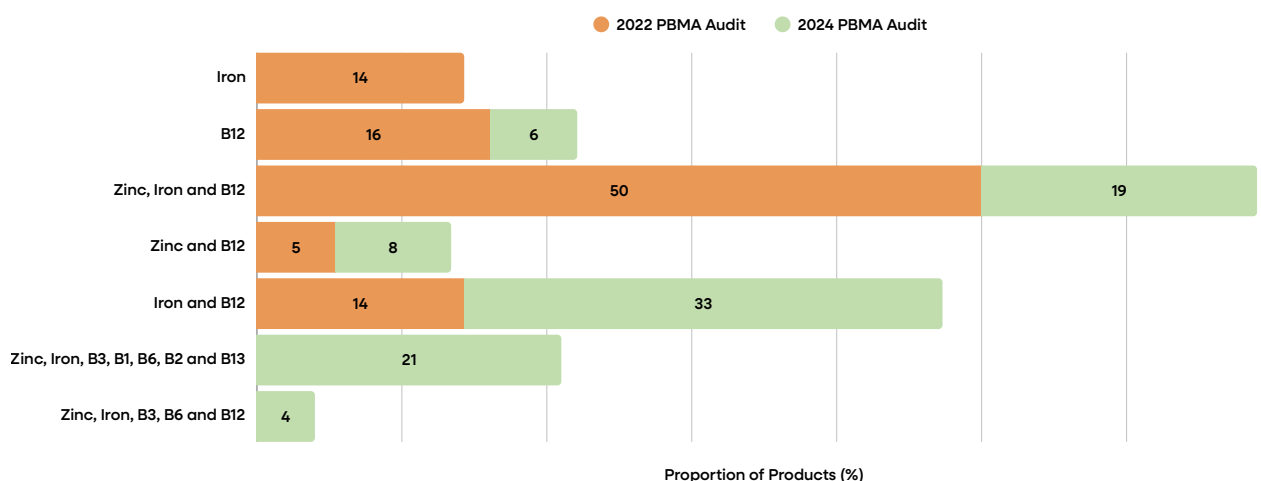
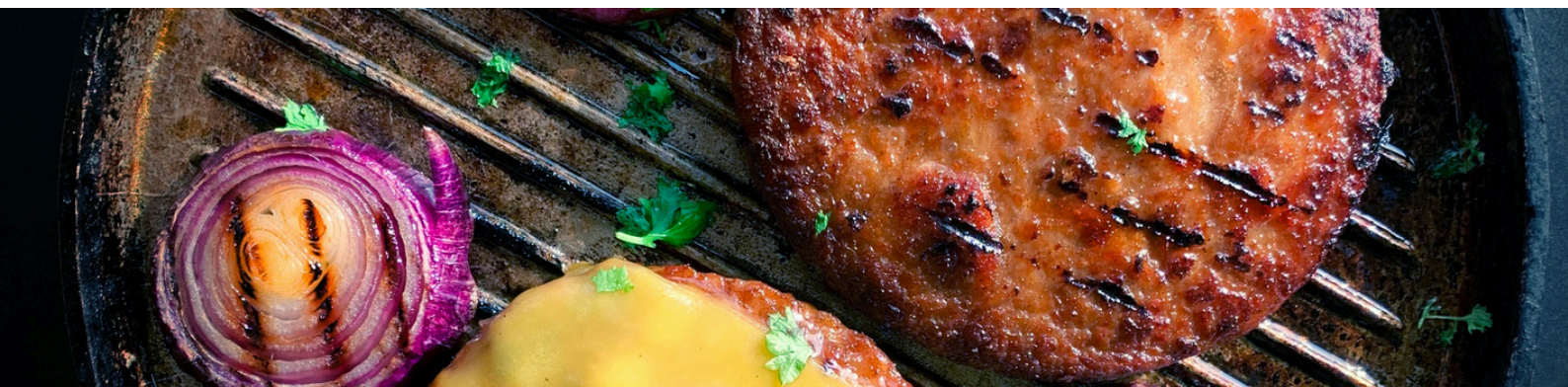


Chart 7: Proportion of plant-based meat alternatives fortified with different vitamins and minerals from 2022 to 2024.

- In 2022, half of fortified plant-based meat products contained zinc, iron, and vitamin B12.
- By 2024, the most common nutrient combination was iron and B12, which was evident in one-third of products.
- The inclusion of other B vitamins became more prevalent in 2024.





Plant-Based Milk

The proportion of plant-based milks fortified with calcium increased by 16% from 2022, accounting for 86% of all plant-based milks.

Of the top-selling non-flavoured plant-based milk, 92% are 'high in calcium'.*

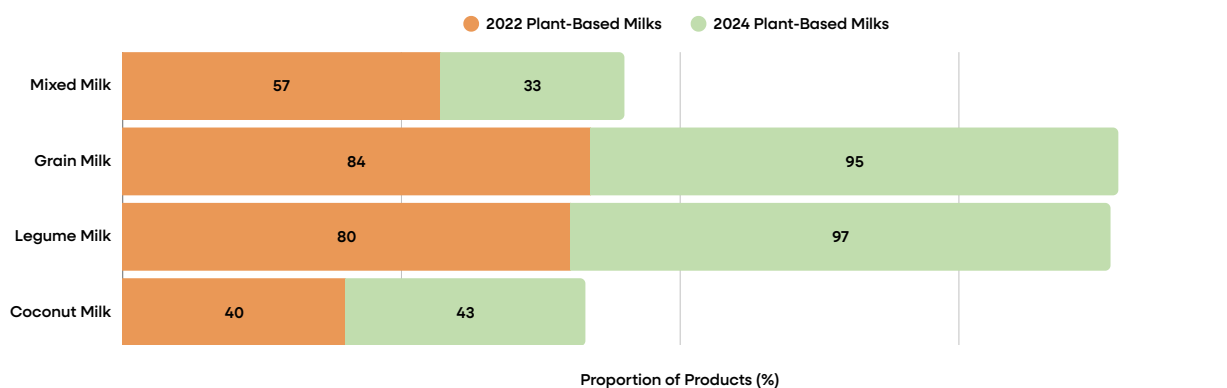


Chart 8: Proportion of plant-based milk fortified with calcium from 2022 to 2024.

In addition to calcium fortification, over one-quarter (29%) of plant-based milks were also fortified with vitamin B12. This fortification is important as vitamin B12 deficiency is a potential concern for those who follow plant-based dietary patterns.



Top-selling reflects the top 75% units sold in this period Sales data provided by Sanitarium, based on NielsenIQ Scantrack for the UHT Milk & Chilled NDM Milk (excluding flavoured milks) segment for the 52-week period ending 19/11/2024, Australia Grocery channel. Copyright © 2025, NielsenIQ.



Health Star Rating

The Health Star Rating (HSR) is a voluntary front-of-pack labelling system, implemented in 2014, to assist consumers in making quick and easy informed food choices.

Did you know?

The HSR of products increases when they contain fruits, vegetables, nuts, legumes, and dietary fibre, as they are considered 'positive' ingredients.

Nearly half (45%) of all plant-based products displayed a HSR on pack, consistent with 2022.

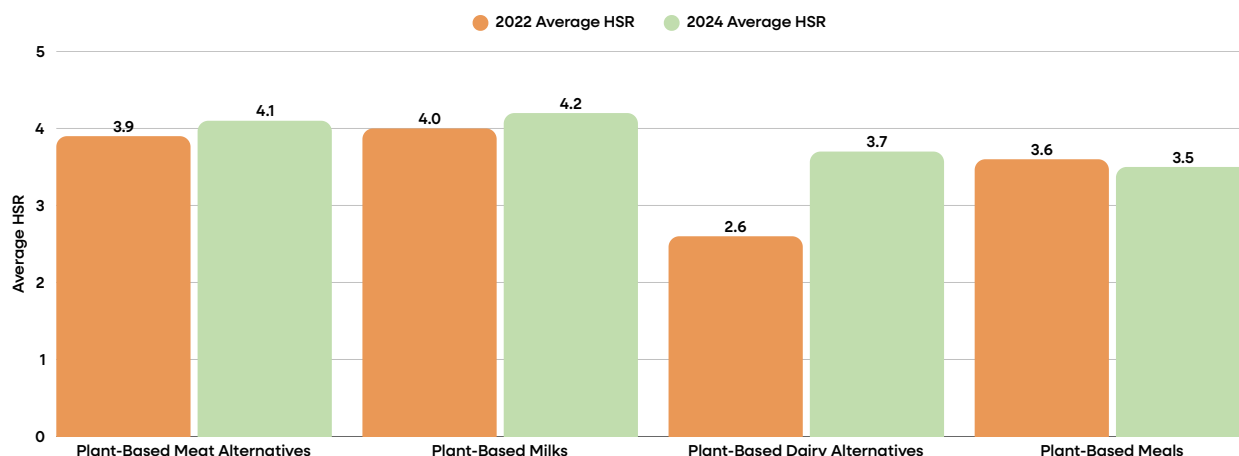
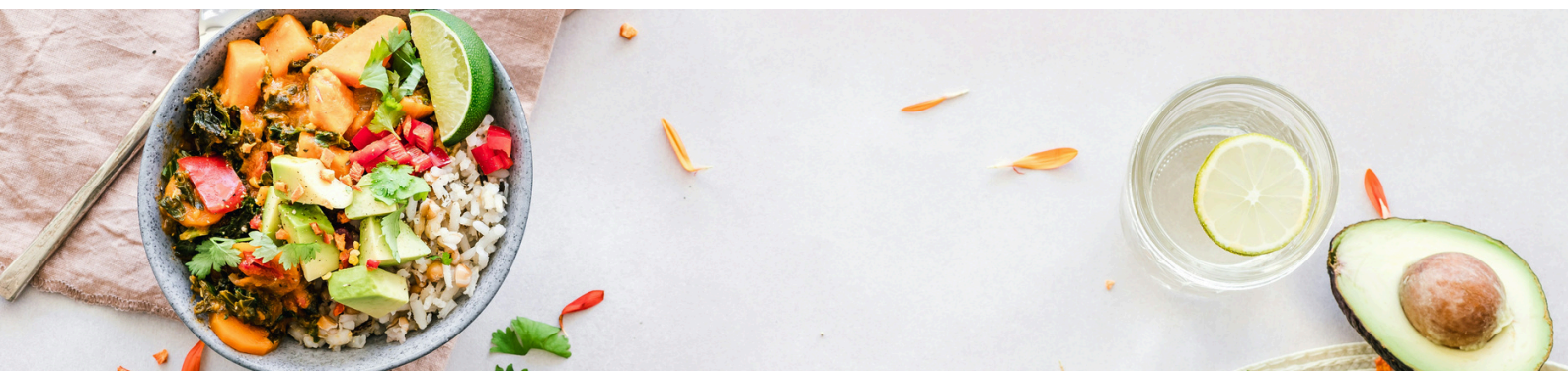


Chart 9: Average HSR of plant-based products from 2022 to 2024.

- Plant-based meat alternatives had the greatest increase (38%) in the proportion of products displaying the HSR, whereas plant-based dairy alternatives had the greatest decline (47%).
- Half of all plant-based products that displayed a HSR showed a rating of 4.0, which was the most displayed HSR among products.





Plant-Based Themes

The ‘Proteinification’ of Food

Plant-based products offer consumers the opportunity to increase their intake of nutrient-rich foods, particularly when products prioritise the use of whole food ingredients. Legumes, grains, vegetables and nuts are naturally rich in dietary fibre, plant proteins, vitamins, minerals and phytochemicals, which support health and help reduce the risk of chronic diseases³⁴.

In Australia, there is an opportunity to better align product messaging and ingredient choices with population health needs. While most Australians meet their protein requirements³⁵, fibre intake consistently remains below recommended levels. Yet, consumer trends, product development and packaging tend to favour protein.

Over half of products were eligible to display a protein claim, and one-third displayed one on pack. In contrast, only 45% were eligible for a fibre claim, with just one in five featuring it.

This reflects the broader trend of ‘proteinification’, where protein content is heavily emphasised in product development and marketing. While this meets the consumer demand for protein and acknowledges the essential role it plays, it can overshadow other key nutrients, such as dietary fibre. Fibre is vital for digestive health, maintaining a healthy gut microbiome³⁶ and preventing chronic disease³⁷.

Fibre diversity plays a key role in health, as different plant foods offer different types of fibre, each with distinct benefits³⁸. Promoting a broader variety of plant-based ingredients, including whole grains, legumes and vegetables, helps close the fibre gap and supports overall health through improved fibre quality and variety.

As more consumers turn to plant-based eating for health reasons, it’s essential to move beyond a single-nutrient focus. Promoting the full nutritional value of plant-based foods, particularly the importance of fibre and its diversity, presents a powerful educational opportunity to support Australians in achieving better health outcomes.





Health-Driven Messaging



Health-related claims are playing a growing role in how plant-based foods are marketed. These claims help communicate the benefits of plant-based foods, and sometimes, reassure consumers that plant-based alternatives can help meet their health and dietary needs.

Health claims are voluntary statements made on packaging that link a nutrient or substance to a health benefit³⁹. Over the past two years, the number of health claims on plant-based products increased by 38%. Among these, health claims linking the relationship between ‘calcium for strong bones and teeth’ continued to be the most displayed health claim, accounting for 43% of all health claims, followed by ‘protein for muscle growth and repair’ (41%).

In addition, there was a 33% increase in vitamin claims and a 29% increase in mineral claims compared to the 2022 audit, highlighting a growing focus on the micronutrient content of plant-based products.

As consumers increasingly turn to food labels to assess the healthfulness of the foods they purchase, the increase in health-driven messaging highlights the growing interest and curiosity about the nutritional adequacy of plant-based products.

Health claims can help guide consumers toward options that align with their dietary goals and offer reassurance about some of the benefits of plant-based alternatives. By clearly communicating functional and health-related advantages, these claims build trust and strengthen consumer confidence in the role of plant-based foods as part of a balanced diet.



Sustainable Diet

The food system has a significant influence on the environment, and there is increasing recognition that dietary choices affect personal and planetary health⁵. This understanding has led to greater emphasis on dietary patterns that promote long-term well-being and reduce environmental harm.

One example is the Planetary Healthy Diet, developed by the EAT-Lancet Commission, which emphasises whole grains, legumes, and other plant-based foods to support healthy eating and a more sustainable food system.

In the 2024 audit, plant-based claims remained the most prominent on-pack, with two-thirds of products featuring this type of claim. Among these claims, 'vegan' was the most common, appearing on nearly half (48%) of all plant-based products.

Reflecting the broader sustainability narrative, claims such as 'sustainable' and 'carbon neutral' are now also commonly used across plant-based food packaging, reinforcing the environmental benefits of these products.

However, consumer understanding of sustainability claims can vary, and ongoing education is needed to ensure these messages are clear, credible and meaningful. Many consumers are aware of marketing tactics and can recognise when claims lack substance⁴⁰, highlighting the importance of transparency and integrity in messaging.

At the same time, it's important that plant-based choices support environmental goals while providing balanced nutrition. Research shows that a sustainable diet can be achieved without excluding any major food groups⁷. Instead, shifting toward more plant-forward dietary patterns can help reduce the burden on natural resources while providing nutrients needed for good health.





Ultra-Processing



Ultra-processed foods are manufactured products that undergo multiple processing to enhance convenience, palatability and shelf-life. However, there is currently no universally accepted definition of what constitutes an ultra-processed food⁴¹.

Despite concerns from some groups about ultra-processed foods, many plant-based products that might be considered ultra-processed according to certain definitions can contribute positively to health and affordability⁴². These foods are often fortified with essential vitamins and minerals or contain fibre-rich ingredients such as whole grains and legumes, helping consumers meet their nutritional needs.

It is important to note that processed foods are not inherently unhealthy⁴³. Processing can improve food safety, extend shelf life and enhance nutrient content. The overall quality of the diet is what ultimately matters most. As the plant-based food category continues to grow, a nuanced and evidence-informed approach is needed.



Concluding Remarks

This report has explored the diverse range of plant protein sources available to Australian consumers. While awareness of the importance of plant-based proteins continues to grow, the recent supermarket audit revealed a decline in the number of plant-based products available over the two years, suggesting that market momentum may be plateauing or shifting. This trend highlights the need for sustained innovation and clarity in education, public messaging and product development.

Importantly, not all plant-based foods offer the same nutritional value. Products that prioritise whole food ingredients, such as legumes, whole grains, vegetables, nuts, and seeds offer a wide range of nutrients including dietary fibre, phytochemicals, antioxidants, and proteins, unlike protein isolates, which are stripped of some of these nutrients during processing.

Supporting the development and accessibility of these products can help improve dietary quality while aligning with environmental goals.



As consumer demand evolves, a balanced and evidence-informed approach is essential. Encouraging the use of whole, nutrient-dense ingredients, improving labelling clarity, and ensuring plant-based choices are accessible and affordable will be key to supporting a healthier food system into the future.





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About Grains and Legumes Nutrition Council

The Grains & Legumes Nutrition Council (GLNC) is a not-for-profit health promotion charity. It is the nutrition knowledge centre on grains and legumes.

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