Protein Diversification in Retail and Wholesale

EuroCommerce
Retail & Wholesale

An informative report for grocery retailers and wholesalers, and their stakeholders

Report topic overview

Opportunities – The potential benefits of protein diversification for the future of grocery retail & wholesale

Status Quo – Retail and wholesale engagement on protein diversification to date, and the outside view of the sector's role

Demand Drivers – Sales & consumer trends, aspects that drive demand, and stakeholders that influence consumer food choices

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Foreword

Essential reading

Protein diversification is increasingly recognised as a promising response to the pressing challenges facing Europe's food system. These include climate change, growing pressure on other environmental resources, and a continued reliance on imports for protein crops and oilseeds.

For the retail and wholesale sector, protein diversification could offer opportunities to strengthen environmental sustainability and enhance supply-chain resilience. Yet progress remains constrained by barriers on both the demand and the supply sides.

Protein diversification is about leveraging the benefits of all protein foods – including food of animal origin. The livestock sector plays a critical role in the food system, including in balanced diets and especially in regions where arable farming is difficult.

This report focuses on alternative proteins, which are still underdeveloped and require support to unlock their full potential and enable a well-balanced, complementary food system – both in terms of production and consumption, combining all protein sources and technology solutions. This can help leverage the advantages of all protein sources and achieve a more sustainable and healthier balance in the food system.

This report is intended to stimulate informed discussion on protein diversification. It has been created as part of the School for Moral Ambition Fellowship[1]. Several retail and wholesale companies and national associations contributed to its development through a voluntary survey[2], interviews, and feedback. These inputs reflect a diversity of perspectives, which the report seeks to represent in a balanced way. Unless explicitly stated - such as in the interviews with retail companies – the views expressed should not be attributed to any specific contributor.

[1] The School for Moral Ambition is a non-profit foundation dedicated to helping people pursue careers that create positive societal impact, supporting those who want their talent and time to contribute to a better world.

[2] 25 EuroCommerce members, including 15 companies, contributed to the survey. National associations and/or relevant market shares (of at least 10% of the national grocery retail market) are represented in 17 European countries: Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Finland, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Romania, Slovenia, Spain, United Kingdom.

This report has been created and published for two main reasons:

Firstly, to share information and insights that may be helpful or inspiring for retailers and wholesalers in Europe, and for anyone supporting them in their work on protein diversification.

Secondly, it is meant to show the actions taken by many retailers and wholesalers that are already actively working on protein diversification. However, it needs to be considered that there are many different opinions and varying levels of engagement on the topic in Europe.

While some retail and wholesale companies and national associations focus on the opportunities of protein diversification and are actively pushing for more public support to enable potential benefits, others have not prioritised the topic and focus on different business interests, strategic priorities, and stakeholder relationships.

This report is not meant to be a scientific research study but aims to provide insights for anyone working on protein diversification within or together with retailers and wholesalers.

This report is not a sector position. It is also not meant to be interpreted as strategic recommendations or consulting. The analysis, evaluation, and overview of potential measures retailers and wholesalers can take are based on the current market situation and research findings.

This report shortly describes why protein diversification can be interesting for retailers and wholesalers.

The "Status Quo" chapter illustrates the diversity of actions and opinions of European retailers and wholesalers towards protein diversification based on a voluntary survey among retail and wholesale companies and national organisations. The analysis results also present the main benefits and challenges grocery retailers and wholesalers perceive, as well as an external view from value chain stakeholders.

The main aspects influencing consumer demand are briefly described in the "Demand Drivers" chapter. The "Outlook" chapter summarises the main challenges, potential solutions, and what retailers and wholesalers can do individually to increase protein diversification.

Finally, the report presents some exemplary initiatives with interviews.

Report Disclaimer

This is an informative report only.

It was created as part of the 7-month School for Moral Ambition Food Transition Fellowship, in which the author worked with EuroCommerce as a “host organisation” based on a consulting agreement.

The report does not represent the positions of anyone involved in its creation. The displayed contents and opinions may not be connected directly with any of the involved stakeholders unless explicitly stated: EuroCommerce or its individual members, The School for Moral Ambition, or the author, editors, and content contributors.

Glossary – Definitions for this report

Protein diversification

Balancing the share of the proteins we produce and consume in a more sustainable and healthier way that reduces the dependence on single sources and decreases the risks and problems associated with our current food system Protein diversification leverages the advantages of all protein sources in a complementary food system where they co-exist with input material flows between them: animal proteins, plant proteins, and other alternative proteins.

Complementary food system

It describes that all protein sources and technology solutions together build a complete system, which has a better balance than the individual protein sources by themselves. In addition, complementation enables synergies between the protein sources. For example, manure is used as fertilizer, carbohydrate-rich side streams from plant protein production are a great feedstock for fermentation, and upcycling low-quality plant streams via fermentation can be a good resource for animal feed.

Alternative proteins

There is not one single agreed-upon definition of alternative proteins. The definition used in this report intends to describe alternative proteins holistically and in a way that is easy to understand:

Alternative proteins are not produced by conventional animal agriculture, fishing, or hunting activities. They are all other proteins that are meant for and safe for human consumption. Alternative proteins can be made from different sources and processes:

- Plants,
- Algae,
- Fungi (including by fermentation),
- Other microorganisms (including by fermentation),
- Insects,
- Direct production of proteins with the same or use-case-optimised composition as well-established proteins (by advanced fermentation or cell-cultivation)

The focus of this report is on the alternative proteins that are already on the market, e.g., plant proteins, and an outlook towards those closest to mass market readiness, e.g., fermentation-based proteins.

Plant proteins

This definition includes all proteins from plants, such as legumes, nuts and seeds, but also cereals and pseudocereals, which can be considered as sources of protein:

- Legumes
  - Pulses (dry, edible seeds of grain legumes), e.g., dry beans, lentils, chickpeas,
  - Fresh legumes, e.g., fresh peas, edamame, green beans, fresh fava beans,
  - Oilseed legumes, e.g., dry soybeans, peanuts,
- Nuts (true botanical nuts & “consumer nuts”), e.g., hazelnut, chestnut & almonds, cashews,

- Seeds (non-nut seeds), e.g., sunflower seeds, pumpkin seeds, flax seeds, hemp seeds,
- True cereals (seeds from grasses), e.g., wheat, oats, rice, maize, barley, sorghum,
- Pseudocereals (seeds from non-grasses used like cereals), e.g., quinoa, amaranth.

The definition covers all other proteins from plants, including those from vegetables and fruits, even if the protein content of these plants is low.

Plant-based

"Plant-based" is a description for products, meals, or categories of products that do not contain animal-based ingredients. The definition for this report also includes products that contain ingredients made from algae and fungi.

Alternative protein products

All products that contain one or more alternative proteins are considered as protein sources and contain no animal-based ingredients. This includes all products sold in grocery retailers and wholesalers that meet the criteria, including, for example, chickpeas, peanut butter, bean burgers, plant-based meat alternative products, ready-made meals like chili sin carne or curries with lentil and tofu, etc.

Not all alternative <u>protein</u> products are "alternative products" but only some are included in the next definition.

Alternative products

Products that imitate animal-based products like meat, seafood, egg, or dairy products. They give interested consumers an option to reach their personal dietary objectives without having to change their habits much. Therefore, food businesses aim for "parity" by bringing alternative products to the same level as the animal-based counterparts they imitate. Product parity is relevant for all dimensions that influence consumer food choices, including price, taste, texture, and convenience.

Most alternative products belong to the sub-category of all alternative <u>protein</u> products when they do not contain animal-based ingredients. Some alternative products contain egg or dairy ingredients and are therefore not included in the definition of alternative <u>protein</u> products.

Blended meat products

"Blended" is used to describe processed meat products like minced meat, burgers, sausages, or cold cuts that are enriched with plant proteins and other vegetables. This addition increases dietary fibre content and decreases saturated fat content.

"Hybrid products" are different from "blended products" because "hybrid" is used to describe a mix of different alternative protein sources without any animal-based ingredients.

Composite products

Composite products are multi-ingredient items with principal components from different food groups.

This definition includes many convenience products that are ready-to-eat or ready-to-heat, including such as chicken curry meals, ham sandwiches, or salads with added proteins or grains, as well as bakery products, snacks and confectionery.

The Ultra-Processed Foods Discussion (UPF-discussion)

In this report, the wording above describes the overall public discourse regarding the so-called “Ultra-Processed Foods” (UPF) and NOVA classification system and how this influences consumer opinions about food products in general, including alternative protein products. This debate does not focus exclusively on alternative proteins, but it affects how some consumers assess plant-based alternative products in particular.

Recently growing concerns over the degree of food processing resulted in greater demand for more “natural” products and “cleaner labels” (with fewer ingredients, commonly used in household kitchens).

Planetary Health Diet

The Planetary Health Diet (PHD) supports human health while respecting planetary boundaries. It is a flexible framework that could prevent up to 15 million premature deaths per year and supports cultural and regional variations.[3]

“The PHD is based entirely on the direct effects of different diets on human health, not on environmental criteria. The diet’s name arose from the evidence suggesting that its adoption would reduce the environmental impacts and nutritional deficiencies of most current diets.”[4]

Alternative protein associations

These associations bring together different stakeholders from the whole value chain and cooperate in order to develop and support the alternative protein sector. Stakeholders/members of these associations can be from the food industry, primary producers and cooperatives, retail and wholesale sector, food service, civil society organisations, and organisations that work with food in any way, including packaging producers, research institutions, and banks.

Some examples on the national level are the Bundesverband für Alternative Proteinquellen e. V. in Germany, the Green Protein Alliance in the Netherlands, Pro Vege ry in Finland, the ČKAP - Czech Chamber of Alternative Proteins), the Verein für Proteinvielfalt in Austria; and on a European level The European Alliance for Plant-based Foods (EAPF) and Food Fermentation Europe (FFE).

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[3] Johan Rockström et. al., "The EAT–Lancet Commission on healthy, sustainable, and just food systems," The Lancet Commission, vol. 406, no. 10512, pp. 1625-1700, 2025. https://www.thelancet.com/journals/lancet/article/PIIS0140-6736(25)01201-2/abstract?dgcid=tlcom_carousel1_lanceteat25

[4] A part of the description by the EAT Forum on: https://eatforum.org/eat-lancet/the-planetary-health-diet/

Key Messages

1

Opportunities and trends point in the direction of more protein diversification: There are many potential benefits for retailers and wholesalers, as well as resilience and competitiveness potential for other European food system actors. To capture these potential benefits, retailers and wholesalers would benefit from setting clear protein diversification targets and actively pursuing them through the direct measures within their area of influence: product, price, placement and promotion.

2

Most grocery retailers recognise the importance of protein diversification, and many are already taking action, but with **varying levels of engagement and diverse opinions** depending on local contexts.

3

Consumer demand is the main challenge to increase protein diversification from the perspective of retailers and wholesalers: The most advanced companies – despite already taking numerous measures – say that they cannot do this alone. They are looking for more support to achieve their own ambitious targets.

4

Cooperations with other influential food environment stakeholders – such as the food industry, food service providers, media, influencers, governments, and civil society organisations – would help retailers increase protein diversification and achieve their targets:

- **Increasing demand for alternative proteins: Demand-driving cooperations** with private and public partners can help strengthen consumer interest in the alternative protein options already available on the market.
- **Building reliable supply chains: Value chain collaborations** can support the development and scale-up of better, more affordable products, ensuring consistent supply
- **Enabling innovation:** A supportive regulatory framework and improved access to financing can accelerate innovation, helping create more competitive alternative protein products to better meet consumer expectations.

5

Additional research is nonetheless needed to evaluate to which extent protein diversification could be an attractive way for retailers and wholesalers to enable these potential benefits. A lack of quantitative assessments on more complex aspects such as healthier foods for consumers, supply chain resilience, future market opportunities, as well as for margin opportunities and food affordability, shows that there is room for more research and evaluations.

Executive summary

Protein diversification has the potential to create many benefits for the retail and wholesale sector, and a well-balanced, complementary European food system in general. The report contains a toolbox of measures retailers and wholesalers can adopt individually to increase protein diversification, without those being recommendations or a sector position.

As protein diversification is about creating a more resilient, competitive, sustainable and healthier balance of all protein sources, the solutions and challenges in a holistic discussion should also address all protein sources. Animal proteins have an important role in protein diversification – based on their important role particularly where they are needed for healthy nutrition, local ecosystems, and rural economies. However, due to the scope of the report, the challenges and solutions for sustainable animal agriculture could not be considered.

Many grocery retailers and wholesalers are actively engaged in protein diversification by taking several supportive measures and some have committed to ambitious targets. They see potential benefits ranging from reaching sustainability targets and enabling healthier diets to more resilient supply chains, and meeting consumer demand for plant proteins and plant-based products.

However, significant differences exist in opinions and levels of engagement across the retail and wholesale sector. Engagement varies by region and reflects cultural preferences shaping consumer demand as well as the strategic priorities of individual businesses.

From the retail and wholesale perspective, consumer demand is the main challenge for increasing protein diversification. Ambiguous or insufficient nutrition information, limited product competitiveness, underdeveloped supply chains, and regulatory barriers further impede progress and slow down protein diversification.

Retailers play an important role in the food environment. Positioned at the interface between the supply chain and consumers, the sector is subject to high expectations from its various stakeholders. While retailers and wholesalers can mitigate some of the identified challenges indirectly, many drivers of both supply and demand lie beyond their direct control and depend on collective action by many other stakeholders.

Therefore, even retailers that have ambitious targets and take numerous measures report that they cannot drive protein diversification sufficiently on their own. Contributions from all actors influencing the food environment can help to make meaningful progress. Stakeholders from the whole value chain from producers to food brands, food service providers, policymakers and governments, media and influencers, civil society organisations, and education institutions all can play relevant roles in enabling retailers to achieve their targets.

At the same time, individual retailers and wholesalers can already take concrete, practical steps within their direct sphere of influence to drive progress. Step-by-step measures across product, price, placement, and promotion offer immediate opportunities to increase protein diversification and unlock associated benefits. Selected adjustments to promotion and placement could require relatively modest investment and can serve as effective entry points or pilot initiatives, for example, by bringing plant proteins more clearly into the consumer spotlight.

Another good starting point for interested retailers and wholesalers is evaluating the potentially most impactful measures, which partly involves working together with other food system stakeholders. Such indirect measures include supporting the development of the alternative protein sector, conducting demand-driving cooperations, and extending value chain collaborations.

Interviews with retailers and cooperating partners highlight a range of promising initiatives already underway. These include investing in alternative protein start-ups; expanding and optimising the plant-based private label assortment; implementing overarching nutrition strategies aligned with the Planetary Health Diet; deploying diverse types of consumer inspirations; systematically reformulating products to improve accessibility and stimulate demand; launching demand-driving campaigns; tracking and reporting the protein split; and helping consumers reach their individual nutrition and sustainability goals through grocery retail loyalty applications.

More research is needed to further evaluate the potential opportunities of protein diversification for the European retail and wholesale sector and all other stakeholders, as well as the aspects that influence consumer food choice (“demand drivers”).

Opportunities

The potential benefits of protein diversification for the future of grocery retail and wholesale

From sustainability and health objectives via food affordability and retail margin pressure to increasing supply chain risks, protein diversification is a key topic to enable the European retail and wholesale sector to address many current and future challenges. A proactive approach to increasing protein diversification not only helps to identify opportunities for potential benefits in these areas but also enables new marketing opportunities based on consumer demand for sustainable and healthier products.

The top 15 CEO priorities from [The State of Grocery Retail Europe 2026 report][5] include some topics where protein diversification can be an important driver of the solutions with existing trends and market-ready plant proteins already:

- "Increasing cost and margin pressure"
- "Strengthening private label"
- "Downtrading of consumers"
- "Supply chain resilience"
- "Focusing more on healthy products"

Moreover, some innovations that are currently being developed and are waiting for regulatory approval have the potential to unlock more progress on these economic priorities, particularly fermentation technologies.

Overview of the main areas of opportunities for retail and wholesale

The opportunities of protein diversification for retail and wholesale can be summarized by six main categories, as shown in Figure 1.

Growing consumer demand for alternative protein products and plant-based options is the most straightforward opportunity. Individual frontrunners can use this demand as an opportunity for differentiation and winning customers. More efficient protein production holds potential for food affordability for consumers and also profitability for retailers.

A plant-rich diet in line with national nutritional guidelines or the Planetary Health Diet is considered healthier than the current average diets in Europe – especially in terms of higher fibre consumption and lower saturated fat intake. Protein diversification can also be a means to increase supply chain resilience by increasing local production and reducing import dependencies.

Finally, protein diversification may be a key lever to reach sustainability objectives, such as CO_2e emission reduction targets.

[5] McKinsey & Company, EuroCommerce. "The State of Grocery Retail Europe 2026", 2026. https://www.eurocommerce.eu/the-state-of-grocery-retail/

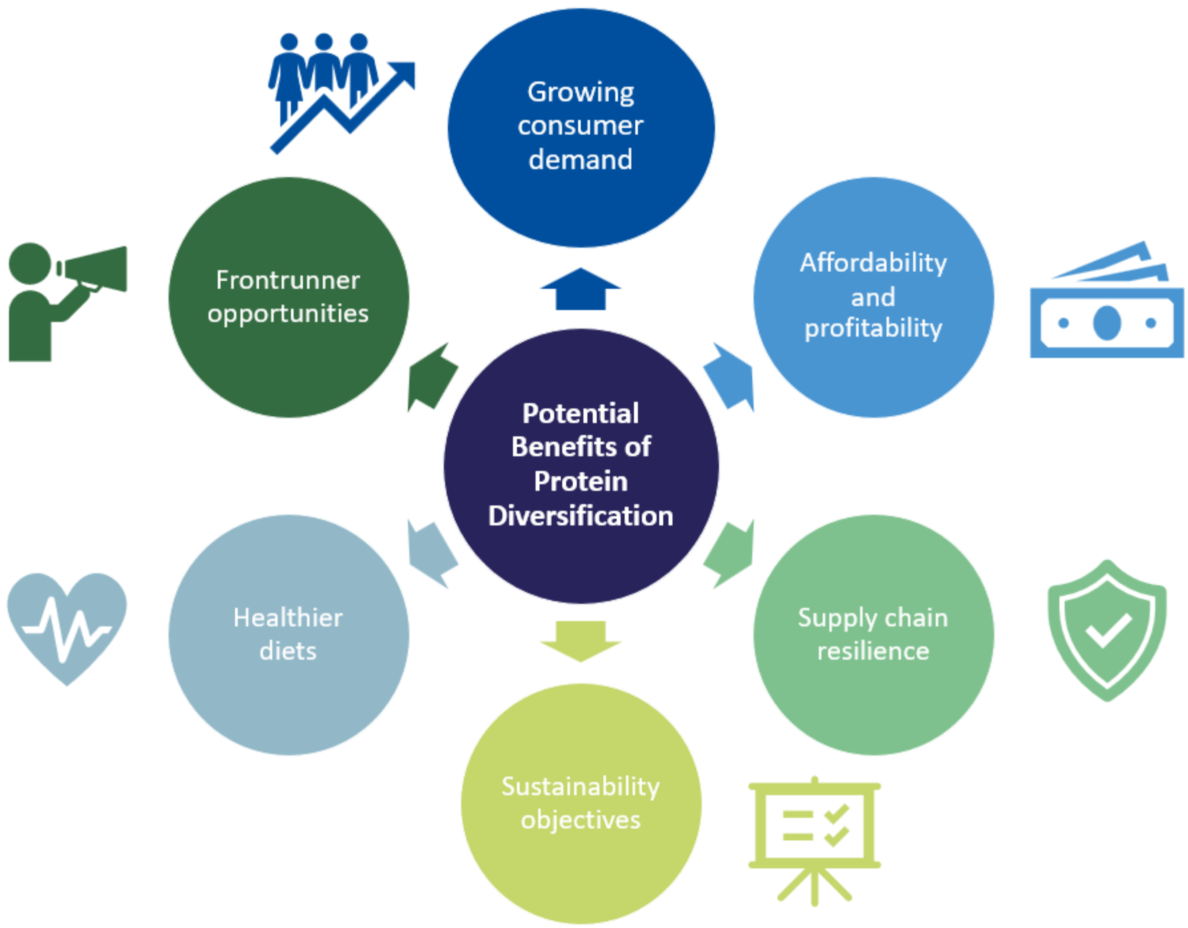


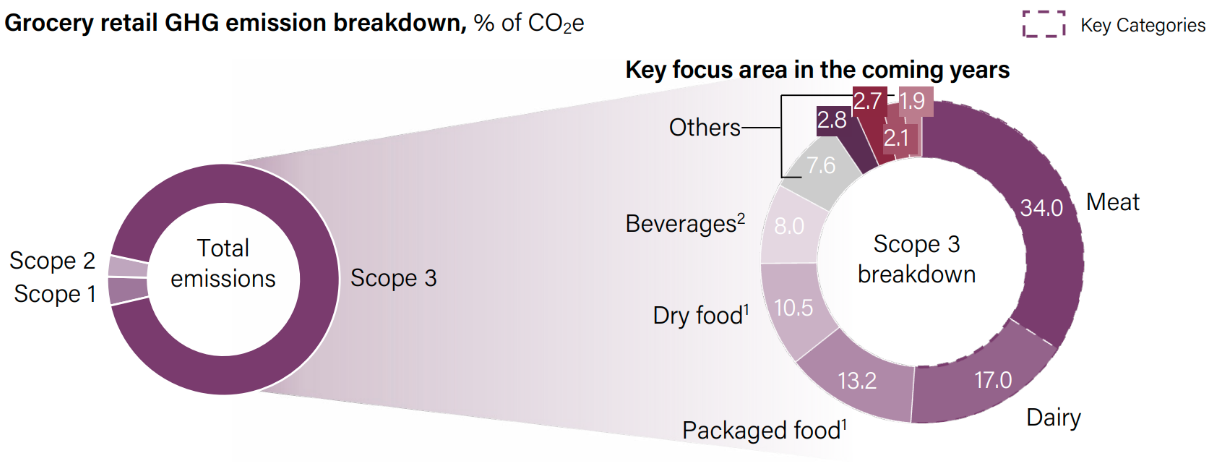
Figure 1: The six main areas of potential benefits of protein diversification for retail and wholesale.

Climate commitments are a main driver for retail and wholesale engagement

The European retail and wholesale sector would need to reduce their Scope 3 emissions to align with the targets of the European Union to reduce its net CO_2e emissions until 2030 by 55% from 1990 levels and reach Net Zero by 2050[6]. Meat and dairy are the largest levers that grocery retailers and wholesalers have for reducing emissions because they account for approximately 47% of all CO_2e emissions (Scope 1, 2 & 3)[7] as shown in Figure 2.

Existing commitments to report and reduce Scope 3 CO2e emissions are therefore a main driver for the engagement of retail and wholesale companies on protein diversification.

[6] Oliver Wyman, EuroCommerce. "NET ZERO GAME CHANGER – Tackling the hidden carbon footprint in European retail and wholesale value chains", 2024. https://www.eurocommerce.eu/2024/06/net-zero-game-changer-tackling-the-hidden-carbon-footprint-in-european-retail-and-wholesale-value-chains/
[7] McKinsey & Company, EuroCommerce. "The State of Grocery Retail 2023", 2023. https://www.eurocommerce.eu/the-state-of-grocery-retail/



1 Processed meat, processed seafood and others (pizza, ready meals, soups, etc.).
2 Both alcoholic and soft beverages.
Source: Euromonitor; Poore & Nemecek

Figure 2: Scope 3 emissions from primary food production have the largest share of grocery retail CO_2e emissions. Source: McKinsey & Company, EuroCommerce

The Status Quo

Retail & wholesale engagement on protein diversification to date, and the outside view of the sector's role

This chapter gives a first overview and description of retailers and wholesalers' current engagement and perceived role in protein diversification in Europe.

The analysis of a voluntary survey among retail and wholesale companies and national organisations underlines the diversity of the sector in terms of the different opinions and levels of engagement.

Overall, most respondents see positive effects from protein diversification and follow the market at the speed of the food culture in their respective countries.

Some frontrunner companies also started to act ahead of the market (e.g., by investing in food technology or introducing price parity) or aim higher than governmental targets (e.g. in the Netherlands). They are motivated by the potential benefits of more protein diversification for their businesses.

At the same time, some other companies are less proactive, mostly looking for trends they can support when the consumer demand is high enough. Only a few survey respondents indicated that they were opposed to novel alternative protein technologies, such as cell cultivation.

Summarizing quote from the survey[8]:

"From a retail and wholesale perspective, protein diversification enables market differentiation, sustainability compliance, operational efficiency, consumer health positioning, and revenue/margin growth. Essentially, it is both a strategic and an operational lever."

Interviews with external value chain players were conducted with organisations ranging from organic farmers, alternative protein start-ups and other producers in the food industry to consumer organisations and cooperatives. The interviewed value chain players see benefits of protein diversification themselves and acknowledge that retailers and wholesalers can play a role in increasing the demand and supply of alternative proteins.

Different positions and levels of engagement towards protein diversification – results from a survey among retail & wholesale companies and associations

EuroCommerce facilitated a voluntary online survey among relevant member organisations, which are or represent companies that sell food products. The survey started in November 2025, and the last responses were received in the beginning of 2026. Individual methodologies for the different types of questions are explained in the next report sections.

[8] Additional response via the "Other" option for the survey question: "Which specific benefits do you see in protein diversification for your organization / your members? What can it enable from your point of view?"

25 EuroCommerce members, including 15 companies, contributed to the survey. National associations and/or relevant market shares (of at least 10% of the national grocery retail market) are represented in 17 European countries.[9]

The survey responses show the variety of positions and engagement to date, market observations, as well as potential benefits for retailers and wholesalers and the main challenges to increase protein diversification.

Shortly summarized, survey respondents are engaged on the topic of protein diversification at their own speed, and several initiatives are already being taken.

Observations on average show a slight increase in demand for all protein sources and also a slight increase of public pressure to increase protein diversification (mostly from consumers and NGOs towards retailers).

Many potential benefits are seen with protein diversification, particularly for sustainability and health engagement, as well as for meeting growing consumer demands and increasing supply chain resilience. However, a lack of quantitative assessments especially on more complex aspects like health, supply chain resilience, future market opportunities, and margin opportunities shows that there is room for more research and evaluations.

Consumer adoption stands out as the main challenge to increasing protein diversification. It is also influenced by other challenges: not clear enough health aspects, especially about the degree of processing and ingredient usage due to the UPF-discussion; remaining shortcomings of product quality (e.g., taste, texture, smell, appearance); supply challenges, including the complexity of still developing value chains in the alternative protein sector, and regulatory barriers for innovations.

Opinions show a diverse degree of support towards protein diversification in general. Some retail and wholesale companies or national associations already advocated individually for a diverse set of topics to support protein diversification, also by joining alternative protein associations where different types of stakeholders cooperate (e.g., the food industry, retailers, food service, and civil society organisations).

The details are discussed in the following sections.

Many initiatives are already taken to increase protein diversification

Companies are already actively applying a diverse set of initiatives to increase protein diversification. Of the 15 companies responding to the survey, 80% answered that they are also actively promoting plant-based products and vegan recipes.

Two thirds of the company respondents answered that they have a private label brand specifically for plant-based products and 60 % that they at least partly apply the placement strategy of positioning plant-based alternative products next to their animal-based counterparts.

Other initiatives that require more commitment[10] are used less frequently according to the survey. One third answered that they defined a specific protein split target, while 80% answered that they created a general protein strategy including alternative proteins. A specific price “parity” strategy to

[9] Austria, Belgium, Bulgaria, Croatia, Czech Republic, Denmark, Finland, Germany, Hungary, Italy, Netherlands, Poland, Portugal, Romania, Slovenia, Spain, United Kingdom

[10] Commitment in this case describes, for example, a clear position in favour of protein diversification to define a protein split target or more resources to develop and sell high-quality private label blended meat products.

price plant-based alternative products at the same price or lower than their animal-based counterparts is (partly) executed by 4 survey respondents (27%).

Table 1: Overview of the many initiatives that some retail and wholesale companies have taken already to increase protein diversification according to a voluntary survey

Initiatives to increase protein diversification	X / 15 company respondents applied the initiative already
Is it easily possible to find vegan recipes on your online presence (e.g. website / social media).	**13 (87%)**
Did you create a protein strategy that includes alternative proteins (not only animal-based proteins, e.g. plants, fungi, algae,...)?	**12 (80%)**
Do you include vegan options when you share home-cooking menus, e.g. in promotions before Christmas, Easter, etc.	**12 (80%)**
Do you make promotion campaigns dedicated only to plant-based products?	**12 (80%)**
Do you have a private label brand specifically for plant-based products?	**10 (67%)**
Do you place plant-based “alternative products” next to their animal-based counterparts?	**9 (60%)**
Did you define a protein split target?	**5 (33%)**
Do you sell private label blended products? (meat products mixed with some vegetables or legumes while keeping the same function, e.g. minced meat, cold cuts or sausages)	**4 (27%)**
Do you price plant-based “alternative products” at the same price or lower as their animal-based counterparts? (using a price parity strategy)	**4 (27%)**

Companies that responded to the survey are actively working on more initiatives than the specific examples they were asked about. Some additional comments and examples provided through the survey included[11]:

- Aiming to implement the Planetary Health Diet in their product range,
- Expanding plant-rich food offer,
- Developing a range of vegan protein products,
- Running private label reformulation projects,
- Developing a new range of prepared, vegetarian meals,
- Making plant-based choices more appealing and affordable,
- Improving promotions, placement and prices for beans,
- Running a completely plant-based store in capital cities,
- Including beans and other naturally plant-based products in drumbeat[12] health campaigns,
- Developing cooperation projects to increase national vegetable production,
- Food-Tech investments in alternative protein start-ups,

[11] The number of initiatives that a survey respondent could mention was not limited. All optional questions of the survey enabled unlimited answers.
[12] Drumbeat campaigns describe recurring marketing campaigns. It is a strategic approach that involves consistently and repeatedly promoting a unified message over a sustained period across multiple channels.

- Running projects to produce high-quality legumes and develop new products to improve local supply.

Here are some illustrative quotes taken as parts from two answers to the optional question:

> "By aiming to implement the Planetary Health Diet in our product range, we intend to provide a supply of plant-based protein sources."

> "Beans: Increasing feature space for beans, expanding store distribution for beans to make sure they are accessible to customers across more formats. Over 700 bean recipes across our website. We price match our own label beans to our cheapest competitor to ensure they are a really affordable source of protein. Beans and legumes are continuously being incorporated into NPD, including grain pouches.
>
> Product innovation: We have developed a new range of prepared, vegetarian meals which are full of vegetables, pulses, grains, seeds and nuts."

Observations of slightly increased consumer demand and pressure from other stakeholders

On average, survey respondents observed a slight sales increase across most protein categories since 2020. Figure 3 illustrates that "Traditionally, little processed plant proteins" and "Whole Food Proteins" are the two categories, in which most survey respondents saw an increase (>50% of respondents).

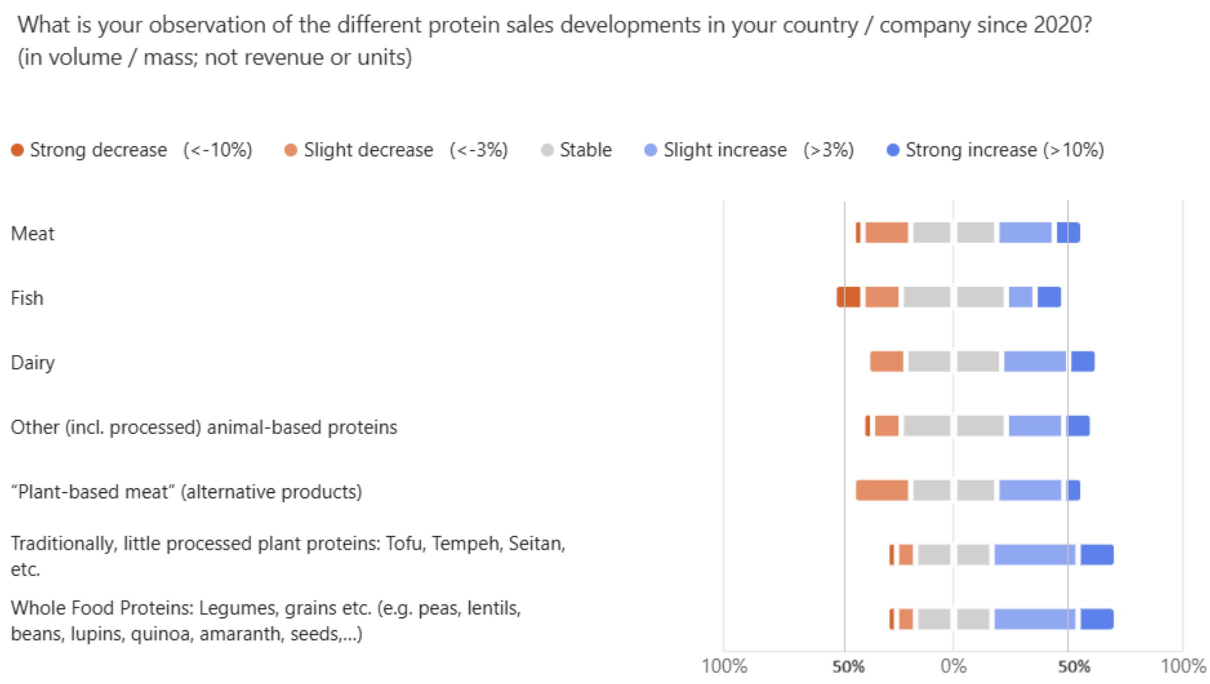


Figure 3: Reported market observations show a slight sales increase across most protein categories. More respondents observed an increase in demand for plant protein than in the other categories.[13]

A slight increase of public pressure towards retailers was reported on average for the question: "How did public pressure on adjusting the product assortment and increasing plant-based sales from the following stakeholders develop in your country/company since 2020?".

As illustrated in Figure 4, few respondents (<15%) reported a decrease of any type of pressure from consumers (e.g., demand, product requests, criticism, constructive feedback, or campaigns), and from the industry (e.g., suppliers asking to sell more plant-based products with better marketing).

Half of the respondents perceived increased pressure from both governments and the industry. >70% of respondents described the observation of increased pressure from NGOs.

[13] Result of 24 EuroCommerce member survey responses for this question based mostly on subjective observations but partly also actual sales data (less than 1/3 of the responses). No information provided by one respondent.
The graphic displays the share of respondents who answered among the red categories "strong decrease (<-10%)" and "slight decrease (<-3%), which move the bar towards the left; stable, which widens the grey section in the middle; and the blue categories "strong increase (>10%)" and "slight increase (>3%), which move the bar towards the right). For the bars that are furthest on the right side, the most respondents have observed an increase.

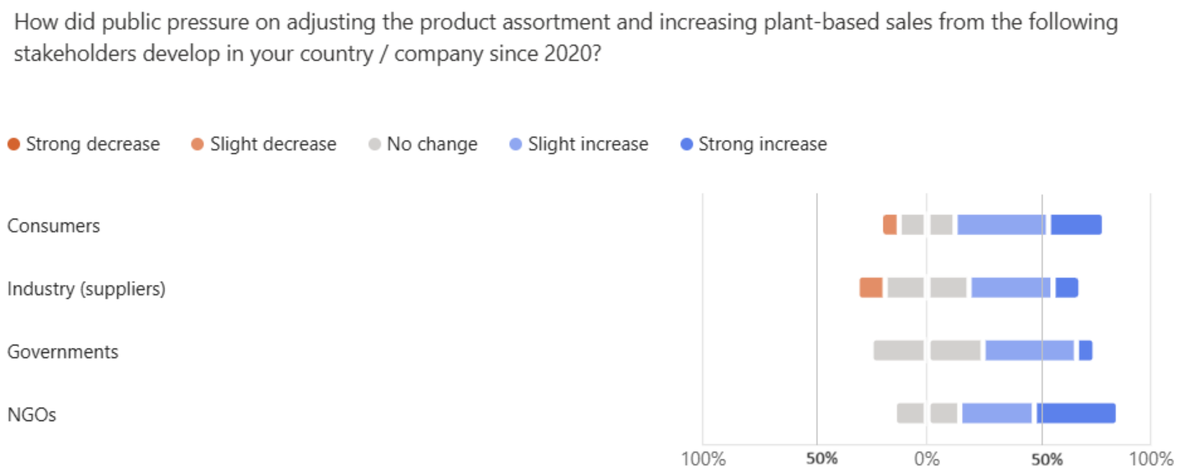


Figure 4: Public pressure towards retailers to increase plant-based sales has increased slightly since 2020, according to observations reported via a voluntary survey[14]

Some additional comments[15] noted that there was little to no public pressure or only from Non-Governmental Organisations (NGOs), while others mentioned a strong increase in demand or pointed to retail initiatives or recommendations.

These are some quotes of the additional comments, representing the diversity of observations across the European retail sector.

- "The vegan trend is winning over more and more"
- "There is no public pressure at all towards plant-based protein."
- "Pressure is really only coming from NGOs."
- "All changes were driven internally and not due to any external pressures"
- "We believe that, fuelled by alternative protein technologies, such as advanced fermentation, we are bringing products to the market that truly have the potential to reach current and future consumer demands and be economically successful.
  It is our ambition to keep the leading position in retail for plant-based alternatives and food tech innovations."
- "Consumers are looking for more naturally plant-based options – with growing awareness and concern around processed foods, customers increasingly worry that meat mimics are unhealthy and heavily processed.
  During the cost-of-living crisis, there was a downtrend of customers eating meat, as well as less veg – and instead prioritizing starchy carbs.
  Plant based meat mimics do have a consistent and loyal audience of customers so these products are important, and there may also be opportunities within more naturally plant-based meat alternatives"
- "We understand that it's wrong to assume a "single profile" for consumers. Some consumers will be more interested in diversifying their diets than others."

[14] Result of 24 survey responses. No answer provided by one respondent. The methodology of the diagram is similar to the footnote explanation of the previous question about protein category demand developments.
[15] Comments about public pressure and consumer demand have been shared in the question: „Feel free to share more information or specific consumer requests here."

Overall positive effects and several potential benefits are expected from protein diversification

Almost all survey respondents see a positive effect from protein diversification (over 90%), with 32% seeing a very positive effect. 60% responded "slightly positive" and 8% "neutral".

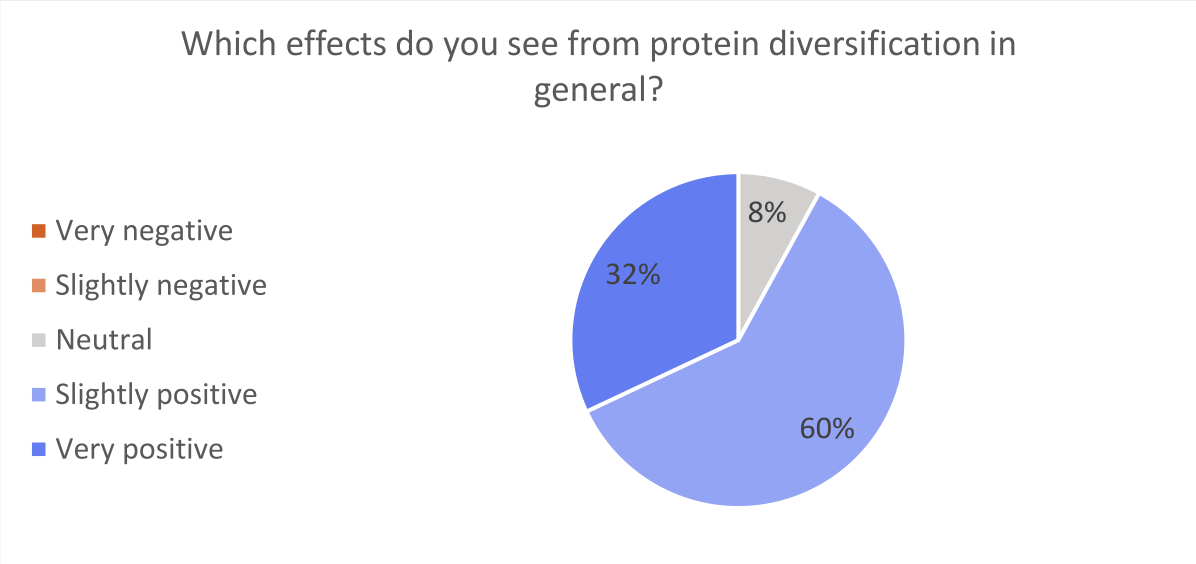


Figure 5: Over 90% of respondents see a positive effect from protein diversification

The respondents to the voluntary survey also see several specific benefits in protein diversification. 5 aspects are leading the list of potential benefits as 80% - 64% chose them in decreasing order:

- Product innovation to deliver to new market trends
- Healthier foods for consumers
- New marketing opportunities
- Reaching individual sustainability goals
- More supply-chain resilience

The other potential benefits, which could be chosen as part of the list presented in the bar chart in Figure 6, also resonated with survey respondents. A bit less than half also marked "Other future market opportunities for frontrunners". 8 out of 25 respondents see potential benefits in "Operations advantages". 20% see the potential that protein diversification can help them to reach higher margins in legumes and plant-based products, as well as food innovations.

Respondents also used the "Other" option to describe more benefits that could not be chosen as part of the list of benefits. One survey respondent does not see benefits in protein diversification and used the "Other" option to report this: "/". These were the described benefits:

- **"From a retail and wholesale perspective, protein diversification enables market differentiation, sustainability compliance, operational efficiency, consumer health positioning, and revenue/margin growth. Essentially, it is both a strategic and an operational lever."**
- "Animal welfare is important to consumers"
- "Less use of land and water, better for biodiversity"

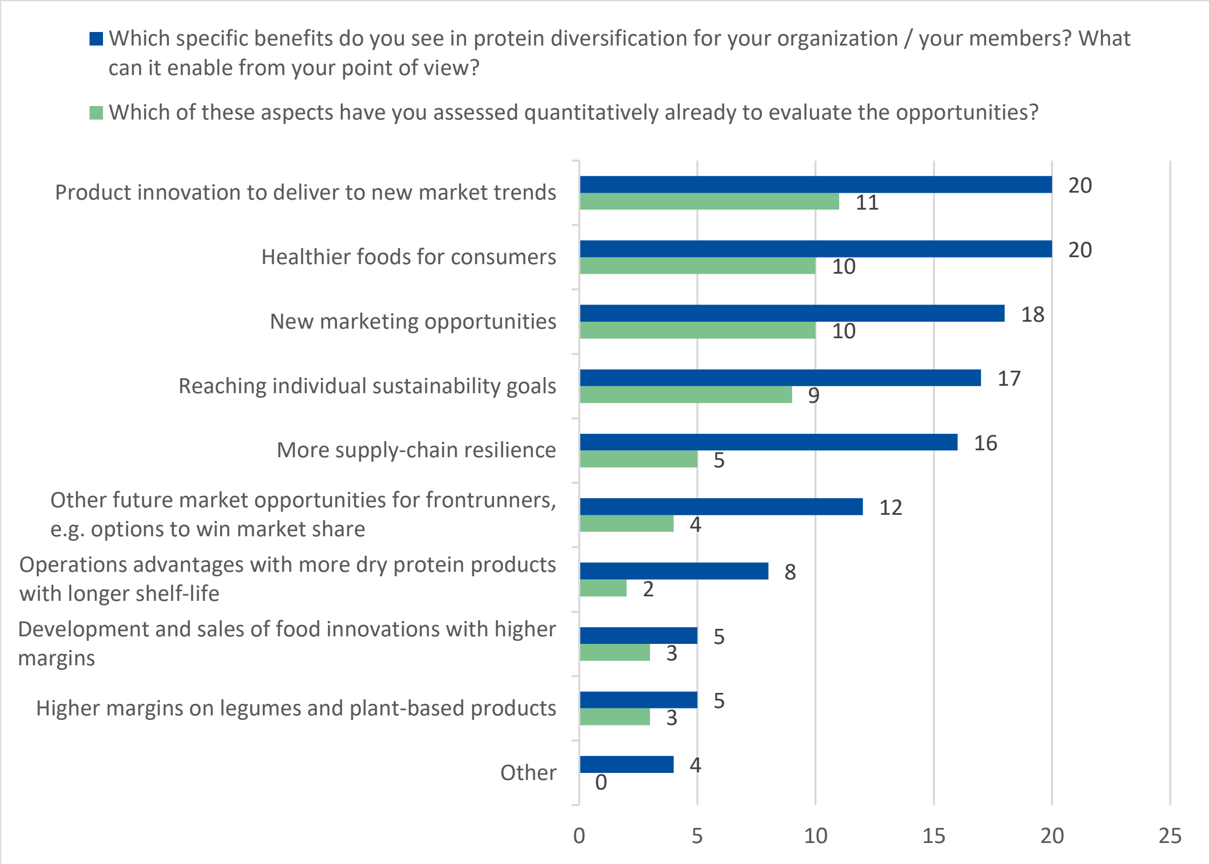


Figure 6: Offering healthier foods, new market trends & marketing opportunities, and reaching sustainability goals are the benefits that most survey respondents see in protein diversification, but less than half of the "benefits seen in protein diversification" have been assessed quantitatively so far

Compared to the blue bar representing the seen potential benefits, the second green bar shows whether survey respondents have answered in the survey that they have quantitatively assessed these potential benefits already. Notably, less than half of the "benefits seen in protein diversification" have been assessed quantitatively so far. This indicates that there is room for further evaluation, possibly through external research initiatives.

The three largest gaps between the seen potential benefits and the quantitative assessment of the opportunity highlight key research needs. These gaps point out where further analysis could clarify to which extent increased protein diversification can enable these benefits for retailers and wholesalers:

- Operations advantages with more dry protein products with longer shelf-life (6/8 = 75% did not analyse the potential benefit despite seeing the potential in it)
- More supply-chain resilience (11/16 = 69% "")
- Other future market opportunities for frontrunners (8/12 = 67% "")

All other potential benefits also have a large gap. Only ca. 50% of the survey respondents who reported seeing these benefits also answered that they have assessed them quantitatively.

Additional research is thus needed to evaluate to which extent increasing protein diversification could be an attractive way for retailers and wholesalers to enable these potential benefits. The potential for healthier foods for consumers, as well as for margin opportunities and food affordability, are examples of potential benefits from protein diversification, which are not very clear yet.

Retailers and wholesalers are in the position to initiate and provide necessary data for researching these topics in detail, but governments, industry, and business consulting can also initiate and drive the research. These stakeholders might be motivated to do so to strengthen relationships and proactively advance protein diversification to unlock benefits for all stakeholders.

Sustainability has been the main driver to activate engagement on the topic of protein diversification. Figure 7 shows an overview of the most named aspects that were answered to the optional survey question "***Which benefits have been most important to activate your engagement in protein diversification and why?***". Health, consumer demand, and supply chain resilience have been the other most mentioned aspects.

Figure 7: Word map of the 19 answers representing the most important benefits for activating retail engagement in protein diversification. Below are some survey quotes**:**

"Sustainability targets - especially climate Net-Zero targets and SBTi commitment; Health as a driver; Reputation; NGO requests and ratings"

"To improve the consumption of vegetables and legumes in healthy diets, also with healthy habits, without criminalizing any other food, or avoiding fighting against any other sectors; due to our companies offering any kinds of food products that consumers demand."

"1- Climate change;
2- Healthier diets;
3- Change in the Food Culture, connecting innovation with heritage food."

"• Resilience, security of supply and laddering up to net zero target
• Health aligned plans which fit with customer interest"

Consumer demand is the overarching challenge to increase protein diversification

Consumer adoption remains the main challenge to increasing protein diversification. Unclear health aspects and product parity are primarily pointed out as consumer-related challenges, but the supply, including product quality, also remains challenging. The relevance of consumer demand as the main challenge is also presented in the word map in Figure 8.

Survey respondents extensively described the challenges as part of the open-ended question "Which specific challenges do you see in protein diversification for your organisation / your members?". These points categorise and summarise the responses:

- Overall consumer adoption, which is represented for example by the following quotes:
  - "we believe there is a big gap with the intention to diversify protein consumption, from the consumers perspective, and actually changing those behaviors."
  - "Consumer adoption and education (taste, habits, perception)"
  - "consumer cooking and eating habits, dietary patterns following the speed of generational renewal (=slow)"
  - "change in cultural mindset from consumers"
  - "volumes are still very low"
  - "We see a gradual increase in protein-rich food consumption, partly linked to a stronger focus on protein intake for perceived health and sports-related benefits. In addition, many customers are accustomed to consuming animal-based protein.
  - "Consumer perception and trust"; "While availability of alternative protein products has expanded and flexitarian eating is slowly gaining awareness, consumer behaviour remains largely anchored in traditional animal-based proteins, with limited adoption of reduced-meat or plant-forward diets."
  - "Behavioural change takes time, and awareness or knowledge is not always fully developed."
  - "The lack of consumer demand/interest."
  - "Consumer demand for alternative products does not correspond to forecasts and is currently still low"
  - "Regulatory, food-safety and consumer-acceptance barriers"
- Unclear and not good enough health aspects for plant-based meat alternative products (especially, in the context of the UPF-discussion, customers may be viewing "meat mimic plant-based products as unhealthy and highly processed (even if this is not necessarily the case)").
- Product parity challenges for imitations of animal-based products (e.g. meat and seafood alternative products), especially regarding cost, but also taste and convenience.
- Long and complex innovation and product development due to regulatory challenges and a lack of financing opportunities.
- Supply chain, sourcing, reporting and other operational challenges.

Figure 8: Word map of the 21 answers to the optional question "Which specific challenges do you see in protein diversification for your organization / your members?"

Related to the challenges described above, survey respondents selected in the subsequent question that the need for improvement to increase protein diversification is the largest for two aspects:

- More studies and communication on health benefits (72% of respondents)
- Education on sustainability aspects and general “food literacy” (68% “”)

The question asked was “What would need to be improved from your point of view to increase protein diversification and demand for alternative proteins to make it more attractive for consumers, retailers, processors and farmers?”. Figure 9 shows the overview of all survey answers.

Approximately half of the respondents (12-14 of 25) stated that product-related aspects like lower costs, higher product quality, and better nutritional values and cleaner labels, completely new product innovations, and local food culture changes would be needed to increase demand for alternative proteins.

Overall political support and specific farmer transition support are similarly important for increasing protein diversification altogether for the benefit of all stakeholders.

On the demand side, better marketing (40%) and the activation of other influential demand drivers like public procurement (32%) are also relevant. On the supply side, more reliability and more availability are also seen as needed improvements to increase protein diversification by 32% and 28% of respondents, respectively.

20% of the survey respondents answered that an “Accelerated time-to-market, e.g. a more efficient novel food process” is needed in order to increase protein diversification.

Additional aspects, which respondents shared with the “Other” option, ask for clarification in the UPF-discussion, and that innovation should expand beyond meat alternatives:

- “Clarification on UPF aspects of alternative proteins especially for meat alternatives”
- “Reassurance regarding the UPF topic”
- “More innovation not only on meat alternatives”

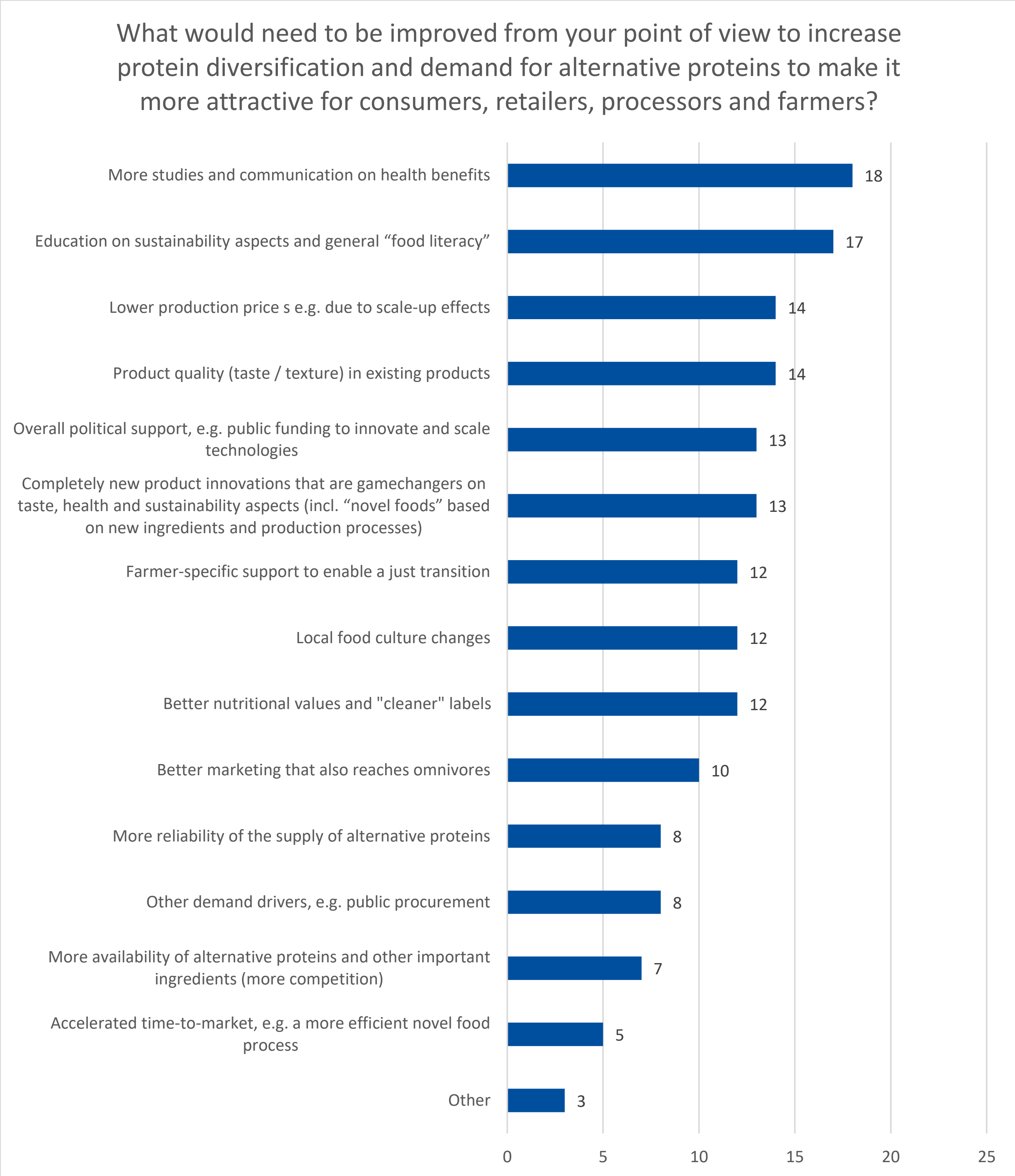


Figure 9: Many aspects need to be improved to increase the demand for alternative proteins and protein diversification in general, and to make it more attractive for all stakeholders

Individual opinions show wide support for protein diversification and alternative proteins in general

Responses to the survey question “What is your position towards protein diversification in general and the individual technologies?” reflect the different stages of engagement and confidence. While some survey respondents have already defined a clear internal position that they could refer to, most respondents added their observation of where they believe their organization currently stands. This section thus also reflects the diversity in opinions and stages of engagement towards protein diversification across Europe.

Based on the survey replies, a large majority of survey respondents supports protein diversification and alternative proteins in general, as represented in Figure 10.

88% of the respondents support protein diversification – including 56% active supporters. One replied to be a passive opponent of protein diversification, while two saw themselves as neutral. “Alternative proteins in general” – and thus by themselves without active diversification engagement – did not have an opponent but 92% supporters and 8% neutral responses (2 answers).

According to the survey answers, respondents are much more supportive than opposed to all alternative protein technologies: Plant-based, algae, advanced fermentation, including biomass fermentation and precision fermentation, and cell-cultivation.

Almost all respondents supported “traditional plant proteins (e.g. whole foods like legumes, grains, nuts, etc., tofu, tempeh)”. 60% considered themselves active supporters and 36% passive supporters.

For most other technologies or sources of alternative proteins, the survey responses showed that supporters are the largest group, followed by neutral respondents and the minority of opponents.

Algae use as alternative proteins does not have any opponents, but 56% overall supporters. Cell cultivation is the only technology where overall supporters are not the largest group with only 40% supporters (including 1 active supporter: 4%), while 44% are neutral, 8% are passively opposing, and 8% are actively opposing the technology.

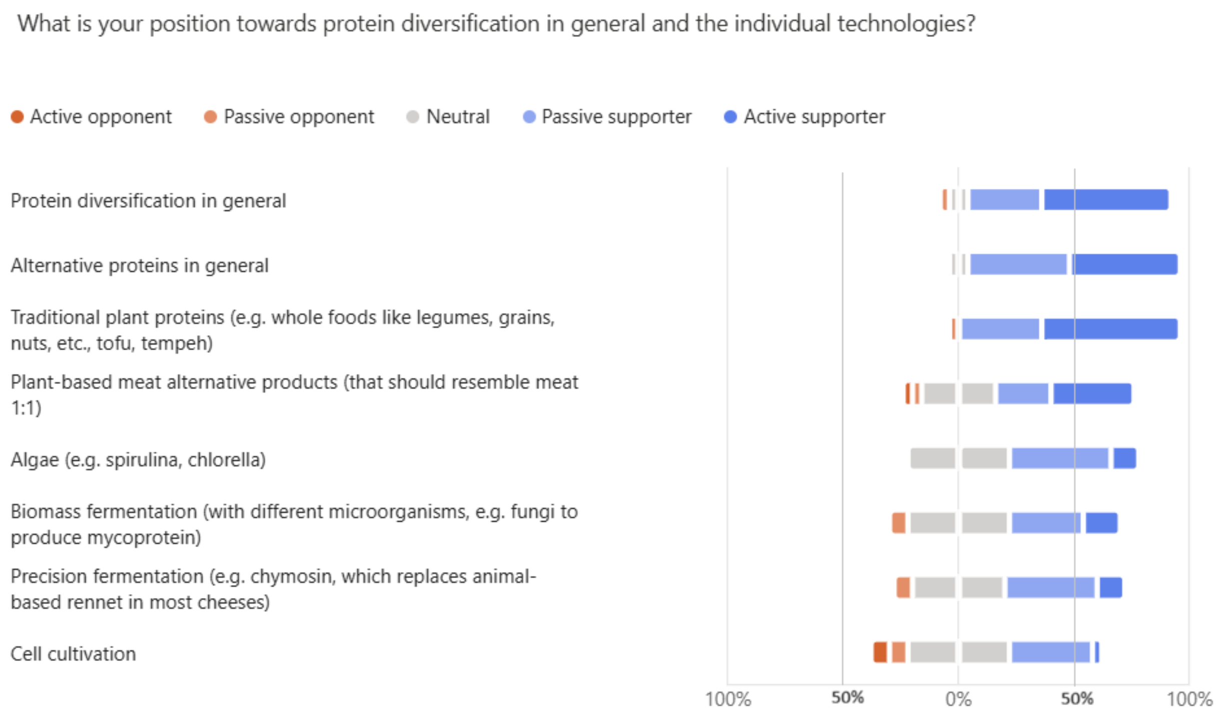


Figure 10: Among the 25 opinions shared in the survey, most survey respondents support protein diversification (88%), alternative proteins in general (92%), and traditional plant proteins (96%)

Acceptance of the different alternative protein technologies also varies among consumers[16]. Based on the diversity of options to work on protein diversification, retail and wholesale companies can consider all regional differences and opportunities to create an individual protein diversification strategy that best fits for their customers, local market environments and business priorities.

Survey respondents advocated for a diverse set of policy asks to support protein diversification

A significant share of 16-40% of the 25 respondents have individually advocated for different measures to accelerate protein diversification in the past. In the survey, they could choose from a list of actions.

The two aspects that most respondents (40%) advocated for are a protein strategy and more public funding for alternative protein development and scale-up.

32% of the respondents advocated specifically for “a (national or European) plant-based action plan” and “an accelerated novel food process, e.g. by making EFSA or your national food safety authorities more efficient with sufficient resources”.

Farmers' interests have been actively supported by respondents who answered that they advocated for “more public funding for protein crop optimization” and “funding and other resources to enable and incentivize farmer transitions to protein crops”.

[16]Isabella Tao Jakobsen et.al. “Cross-cultural consumer acceptance of sustainable protein-rich foods; legumes, plant-based meat analogues and hybrids, and cell-based foods”, *Food Quality and Preference*, vol.135, 2026. https://www.sciencedirect.com/science/article/pii/S0950329325002897

Table 2: Overview of past advocacy to support protein diversification according to a voluntary survey

Past advocacy to support protein diversification on national or European level	X/25 respondents advocated already
Have you advocated for a (national or European) protein strategy?	**10 (40%)**
Have you advocated for more public funding for alternative protein development and scale-up?	**10 (40%)**
Have you advocated for a (national or European) plant-based action plan?	**8 (32%)**
Have you advocated for an accelerated novel food process, e.g. by making EFSA or your national food safety authorities more efficient with sufficient resources?	**8 (32%)**
Have you advocated for more public funding for protein crop optimization?	**5 (20%)**
Have you advocated for funding and other resources to enable and incentivize farmer transitions to protein crops?	**4 (16%)**

Moreover, survey respondents have advocated for additional aspects to support protein diversification in the past.

As part of an optional, open-ended question[17], some respondents described areas of their advocacy engagement so far or mentioned that they did not advocate for anything related to protein diversification yet.

These are some of the examples of advocacy actions undertaken by individual survey respondents:

- Advocating for the establishment of a central coordination office for the "proteins of the future" at national government level,
- Campaigning against the ban on the naming of veggie products at EU level,
- Advocating for broad topics to increase consumer acceptance, e.g. with more promotion and knowledge-sharing, and via public procurement to include more plant proteins in canteens,
- Requesting the application of the reduced VAT for everyday goods and services also for plant-based milk drinks at national level to create a level playing field in terms of taxes,
- Founding alternative protein industry organisations or becoming an (active) member in existing organisations.

Advocacy can be an effective approach to increase protein diversification and enable related benefits. However, the diversity of the sector also leads to a diversity of opinions and needs. Whereas some retail and wholesale companies and national associations are actively pushing for protein diversification to realize potential benefits, the priorities of others are focused on mitigating risks for other business interests and strategic positions based on local culture and supplier environments.

[17] Original question: "Which other aspects in favour of protein diversification and alternative proteins have you advocated for in the past?"

Outside views on protein diversification and the perceived role of the grocery retail

As part of the project, the author engaged with several (value chain) stakeholders who were expected to have touched on the topic of protein diversification already, because they are working with alternative proteins and retailers to some extent. Due to lack of time, conversations were not possible with all stakeholders who were contacted.

Many stakeholders see grocery retailers as one of the main actors that should change the food system, especially from consumer and civil society perspectives, and in terms of influencing the demand for healthier and more sustainable diets.

However, even though the majority of packaged food in Europe is sold by grocery retailers, the sector cannot control the demand and has limited influence on the supply. Retailers are part of a long and complex supply chain with several stages. They are also a part of the food environment that shapes consumer demand. Retailers are often perceived as having a large influence because they are the visible link in this chain (everyone goes grocery shopping).

Structured interviews and informal conversations with related value chain stakeholders, ranging from organic farmers, alternative protein start-ups and associations, and other manufacturers in the food industry to consumer interest organisations and consumer cooperatives, revealed their view on and expectations from the retail sector. Some of these stakeholders (not everyone had something concrete to share) explained several aspects (illustrative and not exhaustive) that they would like retailers to do in the context of protein diversification:

- **Be responsible food environment and supply chain actors** that acknowledge the large amount of influence retailers have and proactively use this influence to help solve the large challenges of our planet and society together with the other engaged stakeholders.
- **Collaborate along the value chain** to lift the whole chain together as single players can only move a small share of it and are dependent on the actions of the other players.
- **Jointly set clear targets** for sourcing specific proteins together with the relevant farmers and suppliers in order to enable their transition.
- **Support the removal of regulatory barriers** that hold back companies from innovation needed for reaching CO_2e emission reduction targets and offering a more diverse set of protein products for a healthy nutrition.
- **Support and invest in innovation** to enable real changes towards a more sustainable, resilient and competitive food system instead of marginal adjustments.
- **Give start-ups and innovative products a fair chance** to be tested in the market while considering the differences in scale (and financial opportunities) and the market environment that heavily favours incumbents and animal proteins.
- **Nudge consumer decisions to make the healthy and sustainable choice the easy one** and respect their important role in the food environment.
- **Share transparent information** on actual health and sustainability differences between products and remove misleading information and false claims to build strong narratives in favour of healthy and sustainable nutrition with plant-rich diets.
- **Proactively inform consumers** directly, including children in schools, as a responsible commitment in addition to the daily business – but also in order to enable relevant products and ingredients to reach sufficient demand to become financially attractive for retailers.

- **Call for an EU strategy for protein diversification** for food and animal feed to reduce the dependencies on imports in Europe.

Most of the interviewed stakeholders are in favour of protein diversification – at least where they see a benefit. However, the majority that does not focus on plant-based or other alternative proteins only, is still working on their exact position to reflect their work with several types of food products, including both animal-based and alternative proteins.

Demand Drivers

Sales & consumer trends, demand-driving aspects, and stakeholders that influence consumer food choices

The continuing value and volume growth of plant proteins at the European level indicates overall growing consumer interest. However, there are also differences between countries. Some countries are further ahead than others, some start to experience strong growth developments, some only have a slow pace of growth, and some might experience a (temporary) downturn or a shift from the recently fastest growing plant-based meat alternative products towards whole foods (e.g., pulses and beans) and little-processed (e.g., tofu, tempeh, seitan) plant proteins.

Overall, the outlook remains positive with forecasts of continued growth across sources and market analyses. Especially innovation is expected to lead to possibly very strong growth once products are good enough because they are competitive across all important factors like price, sensory attributes, and convenience. Furthermore, some current market trends and ongoing consumer desires can be met through more protein diversification – particularly food affordability, health, and sustainability.

Plant protein categories are forecasted to continue growing

Forecasts of further increases in consumer demand for alternative proteins provide the baseline for a development towards more protein diversification that can be actively supported.

Plant protein sales are expected to continue their growth trajectory, according to Euromonitor sales data and forecasting. Figure 11 shows the retail value growth since 2011 and the forecast until 2030. 2025 is partially forecasted in this data set, which covers all 27 EU countries. Sales volume across the plant protein categories, including legumes, nuts and plant-based alternative products, has also been consistently increasing and is forecasted to continue growing.[18]

The Euromonitor retail value forecast between 2025 and 2030 translates into compound annual growth rates (CAGR) between 3.2% to 7.8%, which are led by the categories "Plant-based Cheese" and "Meat and Seafood Substitutes" (as defined and named by Euromonitor).

Other market forecasts support this momentum with a CAGR of 7,6% and 15,9% for the global alternative protein market until 2033[19] and the European plant-based meat market until 2033[20] respectively.

[18] "Euromonitor_Aggregate EU-27_Market Sizes_11.02.2026". Euromonitor International Limited 2026 © ALL RIGHTS RESERVED, 2026.
[19] Coherent Market Insights, "Alternative Protein Market Size and Trends – 2026 to 2033", https://www.coherentmarketinsights.com/industry-reports/alternative-protein-market, 30.03.2025.
[20] Market Data Forecast, "Europe Plant Based Meat Market Report" https://www.marketdataforecast.com/market-reports/europe-plant-based-meat-market, 11.2025.

For comparison: European meat consumption in 2025 was ca. 40 million tonnes[21] – 200 times more than the “Meat and Seafood Substitutes” category retail sales volume of less than 0.2 million tonnes.

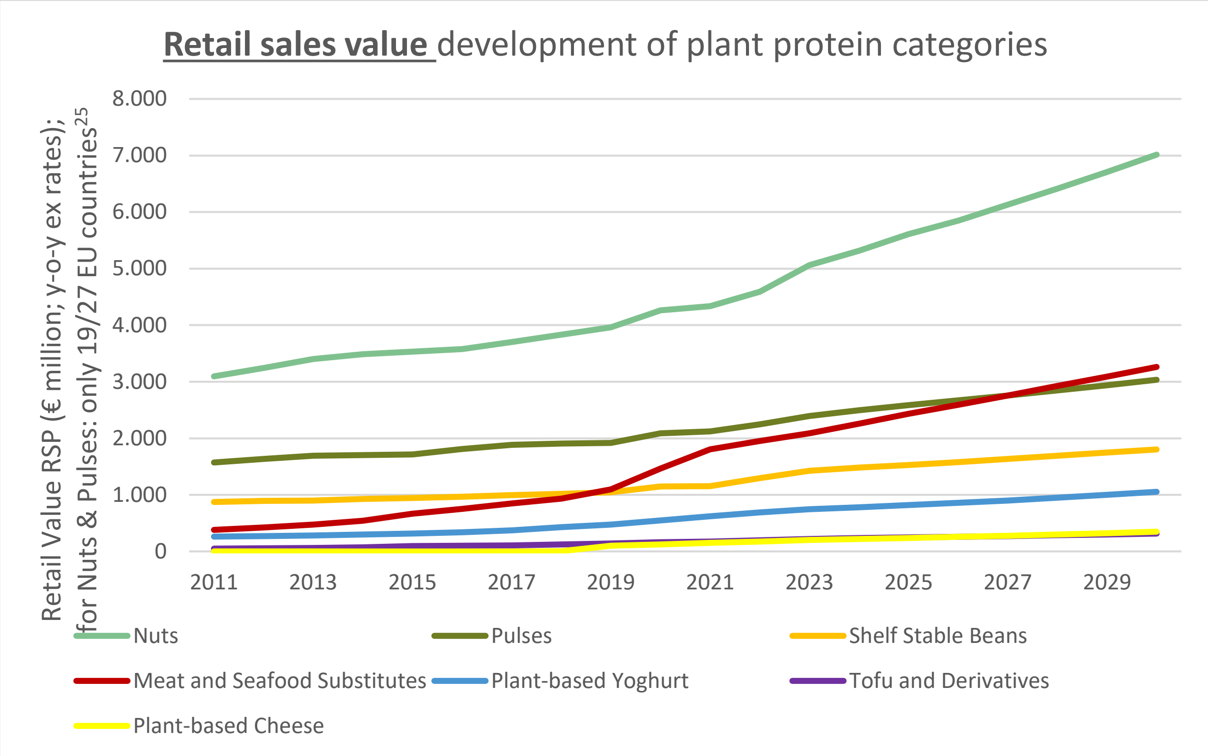


Figure 11: Retail sales value for plant protein categories has been growing strongly since 2011 and is forecasted to continue growing. Source: Euromonitor International Limited 2026 © All rights reserved[22]

Many retailers and other food system actors increasingly view the rising demand for more sustainable proteins and a plant-rich diet not as a short-lived trend but as a long-term shift they should actively help shape. They see a responsibility to support this development through measures such as product innovation, so they can offer consumers tasty, affordable, and competitive options that meet evolving expectations.

Some major European retailers are actively working for more protein diversification, moving closer to the Planetary Health Diet and / or measuring and reporting their protein split. Examples of these retailers are:

- Lidl aims to increase the proportion of plant-based foods sold by 20 % until 2030 across all 31 European countries with Lidl stores (country-specific ambition levels apply).
- Ahold Delhaize announced a protein split target of 50% by 2030 for European food retail brands in January 2025 (at the time excluding the Romanian food retailer “Profi”).
- The majority of the Dutch food retail market sets more ambitious targets than the Dutch government’s: 50:50 plant-to-protein split by 2030.

[21] EC (2025), EU agricultural outlook, 2025-2035, European Commission, DG Agriculture and Rural Development, Brussels. https://op.europa.eu/fr/publication-detail/-/publication/2d8980f6-ed09-11f0-8d3c-01aa75ed71a1

[22] 19/27 EU countries: Austria, Belgium, Bulgaria, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Netherlands, Poland, Portugal, Romania, Slovakia, Spain, Sweden

- ALDI SÜD Deutschland has the objective to implement the Planetary Health Diet in their product range and tracks progress with the enhanced WWF Methodology.
- REWE Group has the objective to increase the proportion of plant-based products in the total purchasing volumes of REWE and PENNY Germany to 60 percent by 2035.
- EDEKA tracks and publishes their protein split by reference to the enhanced WWF Methodology.

The Superlist Environment Europe 2026 provides a detailed overview of supermarkets in Europe and who is leading with their engagement on what it calls the “protein transition”, for example, by setting targets to increase plant-based sales.

Current consumer trends create opportunities for protein diversification, but some also create challenges for alternative proteins

The State of Grocery Retail Europe 2026 report[23] summarizes the most relevant consumer intentions. With regard to protein diversification, the following intentions describe long-term trends where protein diversification is an opportunity for grocery retail companies to help consumers reach their intentions in the decreasing order of consumers’ net intent:

- **Affordability** with low prices, promotions and cheaper foods: “Look for ways to save money when shopping”, “Actively research for best promotion”, “Switch to less expensive foods to save money”
- **Private label**: “Buy store’s own brands instead of known brands”
- **Health**: “Focus on healthy eating and nutrition”

Additional sources provided validation, revealed more insights and sub-trends of the above-mentioned trends, and additional trends worth mentioning. Most trends create opportunities for more protein diversification, but some trends also generate potential blockers for plant-based alternative products and innovative alternative protein products.

These are the most relevant trends according to additional sources – particularly the Consumer Trends Report of the EIT Food Consumer Observatory[24]:

- **Food affordability**
- Overall **health** consciousness including:
  - Gut health
  - Fibermaxxing
  - High-protein
  - The “Ultra-Processed Foods Discussion” and a desire for natural products with a clean label
  - Longevity
- **Sustainability**
- **Regionality** that enables trust
- **Convenience** from ready-to-heat to easy-to-cook

[23] McKinsey & Company, EuroCommerce. "The State of Grocery Retail Europe 2026", 2026. https://www.eurocommerce.eu/the-state-of-grocery-retail/
[24] EIT Food Consumer Observatory, “Consumer Trends Report”, 2025. https://www.eitfood.eu/reports/consumer-trends-shaping-the-food-system

Demand drivers and the stakeholders who influence them

Several factors influence whether a consumer purchases a specific product. These factors can be summarized as “demand drivers” when discussing increases in sales of a product or category.

A general framework that enables a visual explanation of food choices is the socioecological model presented in Figure 12, which describes four circles of influence. It starts with the food environment level, which encloses the social/community level, which in turn encloses the next smaller level, the interpersonal level. The smallest of the 4 levels is the individual level.[25]

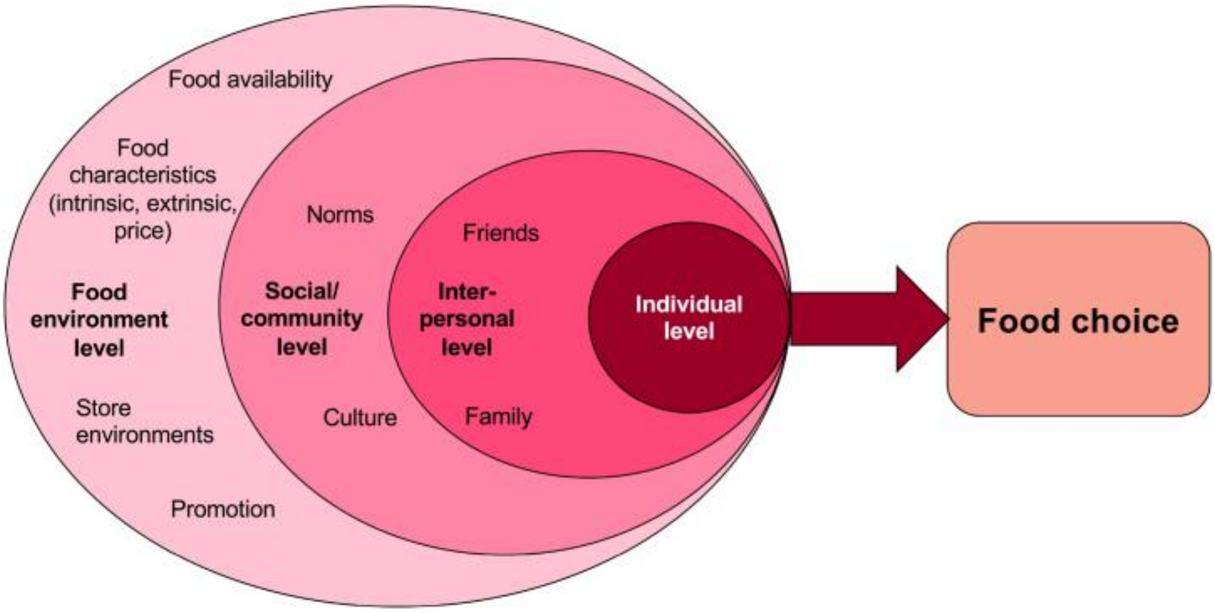


Figure 12: The socioecological model is one conceptual framework to analyse how a food choice is made and thus also demand drivers in general. source: Fredrik Fernqvist et. al.

While the socioecological model is a visual explanation of single food choices based on the current environment – and thus a comparably static framework – a customer journey intends to describe all touchpoints that are needed to create a purchasing decision[26].

Early childhood experiences tend to influence later dietary habits[27]. Hence, an analysis of the overall influence of demand drivers on food choices should start at the very beginning of shaping dietary habits.

Including the socioecological model in a usual customer journey points out the importance of lifelong influences on food purchasing decisions.F13 illustrates the influential steps that should be considered when discussing demand developments and the differences between actual consumption and dietary guidelines.

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25 Fredrik Fernqvist, Sara Spendrup, Richard Tellström. “Understanding food choice: A systematic review of reviews”, *Heliyon*, vol. 10, no. 12, 2024. https://pmc.ncbi.nlm.nih.gov/articles/PMC11215270/

26 SurveyMonkey. “Identify customer touchpoints”, https://www.surveymonkey.com/learn/customer-feedback/identify-customer-touchpoints/

27 Kelly Guedes de Oliveira Scudine, Paula Midori Castelo, João Paulo Maires Hoppe, André Krumel Portella, Patricia Pelufo Silveira. “Early Influences on Development of Sensory Perception and Eating Habits”, *Advances in Nutrition*, vol. 15, no. 12, 2024. https://www.sciencedirect.com/science/article/pii/S2161831324001595

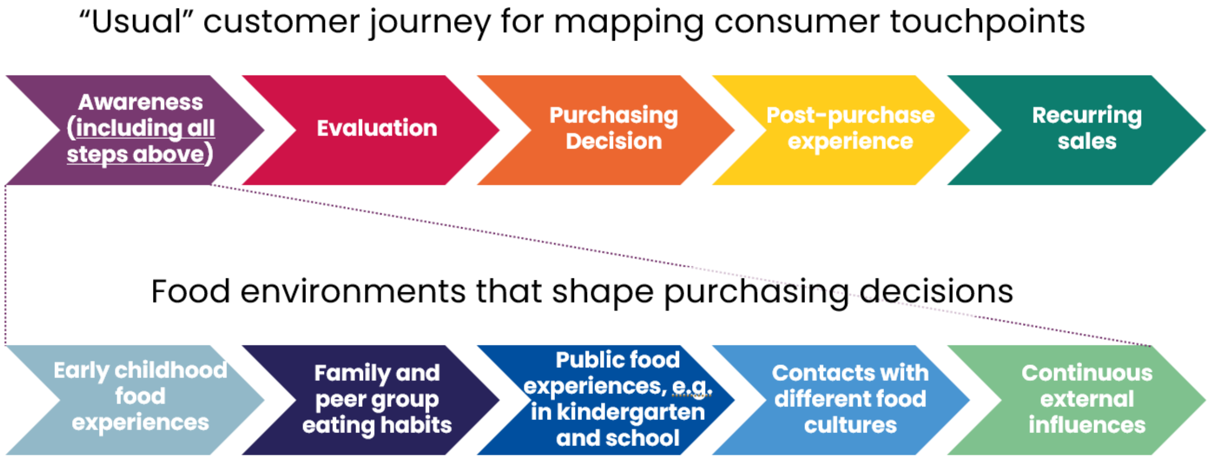

Figure 13: Illustrative overview of steps that influence food purchasing choices throughout the whole customer life, starting with childhood food experiences

Retailers and wholesalers can directly work on the demand drivers within their own sphere of influence, but they cannot control the factors outside their sphere of influence. It would thus help if other food environment stakeholders also used their influence to increase protein diversification on a larger scale.

At the same time, retail and wholesale companies may also choose to become active beyond their usual business processes and responsibilities. For example, they could proactively cooperate with other influential stakeholders to move the demand drivers within their respective spheres of influence.

Outlook

Measures retailers and wholesalers can take to increase protein diversification & best practice initiatives

As protein diversification is about creating a more resilient, competitive, sustainable and healthier balance of all protein sources, the solutions and challenges in a holistic discussion should also address all protein sources. Animal proteins have an important role in protein diversification – based on their important role particularly where they are needed for healthy nutrition, local ecosystems, and rural economies. However, due to the scope of the report, the challenges and solutions for sustainable animal agriculture could not be considered.

This chapter also focuses on the most neglected and least developed protein sources – the so-called "alternative proteins". The largest importance for retailers and wholesalers among these pertains to the ones already on or closest to the mass market: plant proteins and fermentation-based proteins.

Potential solutions for the main challenges to increase protein diversification

The largest challenges facing alternative proteins today need to be addressed to enable more protein diversification and realize the complementary benefits of all protein sources for the European retail and wholesale sector. Based on the survey among retail and wholesale companies and national associations, as well as additional conversations, these five main challenges have been identified:

- **Demand**: Still relatively little demand, with growth falling behind high expectations due to generally slow consumer adoption, increased price-sensitivity and downtrading in the cost-of-living crisis, and the following challenges below that are all barriers for growing demand.
- **Supply**: Not sufficiently convincing product performance (taste, convenience, nutrition), long product development and supply chain limitations in the still underdeveloped alternative protein sector limit the offer of competitive products, which have the potential to further increase demand for alternative proteins.
- **Nutrition education**: Many diverging opinions, opposing research results and polarization in the public discourse – including the UPF-discussion – hinder a widespread narrative in favour of protein diversification with alternative proteins and plant-rich diets.
- **Regulation**: Limited political support and regulatory barriers reduce the innovation and competitiveness of alternative protein products and ultimately limit consumer adoption.
- **Existing political pressure and vested interest:** Some stakeholders have opposing interests to an increase in protein diversification; resulting in more cautious, slower and less impactful actions to increase the demand for alternative proteins.

Retailers and wholesalers can address the main challenges with different approaches to enable good solutions:

- **Demand:**
  - Individual actions where retailers and wholesalers have direct influence on consumer demand, e.g., on product, price, placement, and promotion, particularly of private label products.
  - Directly via demand-driving campaigns to promote specific meals or ingredients in cooperation with e.g., food service, food brands, media, influencers.

    - Indirectly via food information and food culture campaigns in cooperation with other food environment actors, e.g., governments, civil society, gastronomy, influencers.
    - Requesting supportive measures that make more sustainable and healthier food choices easier, e.g., informative labelling, public education, and public procurement to re-establish plant proteins as relevant protein sources with a long tradition.
    - Product innovation with private label suppliers that is primarily meant to increase demand but can also enable the supply of more competitive products.
- **Supply:**
    - Value chain collaboration to enable transitions based on joint objectives that create a clear business case for the involved stakeholders, e.g., farmers and processors.
    - Advocacy for policies that enable transitions and innovation, e.g., on the one side, funding and other support for alternative protein / FoodTech research, product development and industrial scale-up; and crop optimization, AgriTech research and development, industrial scale-up of processing facilities and support of proactive farmer transitions on the other side.
- **Nutrition education**:
    - Proactive information activities by retailers and wholesalers, e.g., campaigns to inform consumers, including children, about nutritional guidelines and advice, and how to cook tasty and nutritious dishes with a focus on plant proteins and plant-based foods in general, including vegetables and fruits. Retailers and wholesalers can also speak up to request more public nutrition education to address the challenge indirectly.
    - Advocacy to enable permanent political support of healthy and sustainable diets, e.g., via updated nutritional guidelines, and government-run programs or financial support of relevant education programs.
- **Regulation**:
    - Working with policymakers to level out the playing field and keep the door open for innovations without putting new blockages in the way, e.g., applying the same VAT for comparable everyday goods, and accelerating the novel-food process while keeping the same high safety standards.
- **Existing political pressure and vested interest:**
    - Ensuring a continued open debate to identify and work towards providing benefits along the whole food value chain. It is important to understand the political and economic landscape to enable sufficient acceptance in the public debate.

The described advocacy approaches could be addressed through holistic action plans inspired by the first such example: the Danish Action Plan for Plant-based Foods.

The types of foods with high potential to support protein diversification and move toward a more sustainable, healthier diet can be divided into 3 categories. A spectrum of solutions needs to be considered to achieve the best results in terms of healthy and sustainable diets. Key approaches include in order of increasing market potential and decreasing market maturity:

1) **Planetary Health Diet**: Whole food plant proteins, e.g., from legumes, but also from cereals, pseudocereals, nuts and seeds, are parts of many dietary guidelines[28]. Increasing plant protein consumption by moving closer towards these dietary guidelines – or the Planetary Health

[28] European Commission, "Food-Based Dietary Guidelines in Europe: Source Documents", 07.11.2025. https://knowledge4policy.ec.europa.eu/health-promotion-knowledge-gateway/food-based-dietary-guidelines-europe-source-documents-food_en

Diet[29] as a clear nutrition and sustainability goal – also increases protein diversification. Traditional processed plant proteins like tofu, tempeh and seitan are also mentioned explicitly in some dietary guidelines in Europe, e.g., all of the mentioned plant proteins in Switzerland[30].

2) **Plant-based alternative products**: Optimized plant-based products are expected to be more likely to increase the consumption of plant proteins in the diets of many consumers. These products represent an approach to reducing the attitude-behaviour gap[31] in consumers who are interested in eating more sustainable products but are unlikely to change their dietary habits due to several reasons.

3) **Ingredient and product innovations with other alternative proteins**: The opportunities from algae, fungi, and other microorganisms include both optimizing existing products with innovative ingredients, as well as creating completely new products and dishes (recipes for new composed meals) that can be more attractive for consumers in terms of the purchasing arguments they are optimized for, e.g., price, taste, texture, presentation, nutrition, culture.

Overview of potential actions that individual retailers and wholesalers can take

Retailers and wholesalers have some influence over a part of the food environment through the approaches they decide to use to offer products to end consumers and their business customers, respectively.

Although many different demand drivers exist and many stakeholders influence consumer purchasing decisions, retailers also have an opportunity to nudge consumers towards more sustainable and healthier choices. If retailers acknowledge and leverage their influence on the food environment, they can influence their product sales in the interest of their company's sustainability and nutrition goals. Dedicated measures can also help them unlock more potential benefits of protein diversification, such as greater supply chain resilience.

There are many measures retailers and wholesalers can take – both directly and indirectly – to work towards more protein diversification. These actions differ in both the impact potential and the required efforts to execute them successfully.

Direct measures refer to the areas of demand drivers that retailers and wholesalers can influence directly, while indirect measures refer to enabling more effective internal work, e.g., with a clear strategy, and to initiating measures by other stakeholders beyond the area of direct influence from retailers and wholesalers, e.g. public procurement or educational campaigns.

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[29] Johan Rockström et. al., "The EAT–Lancet Commission on healthy, sustainable, and just food systems," The Lancet Commission, vol. 406, no. 10512, pp. 1625-1700, 2025. https://www.thelancet.com/journals/lancet/article/PIIS0140-6736(25)01201-2/abstract

[30] Swiss Federal Food Safety and Veterinary Office, "Swiss Dietary Recommendations", 06.10.2025. https://www.blv.admin.ch/blv/en/home/lebensmittel-und-ernaehrung/ernaehrung/empfehlungen-informationen/schweizer-ernaehrungsempfehlungen.html

[31] The "attitude-behavior gap" refers to the discrepancy between people's stated attitudes and their behavioral reactions. (Definition by Aleksandra Burgiel-Szewc, Laura Maria Wallnöfer, "Attitude-Behavior Gap", 2025. https://www.taylorfrancis.com/chapters/oa-edit/10.4324/9781003584056-10/attitude-behavior-gap-aleksandra-burgiel-szewc-laura-maria-walln%C3%B6fer)

Direct measures by influencing the 4Ps: Product, Price, Placement, Promotion

Product:

- Expanding the alternative protein product assortment,
- Creating a private label brand dedicated to only alternative protein products (plant-based),
- Innovating technologies to improve alternative protein products regarding price, taste, texture, smell, appearance, and convenience to meet developing consumer demands,
- Diversifying proteins in composite products and other processed private-label products,
- Optimizing plant-based private label products with a cleaner label (fewer ingredients and free from, e.g., artificial aromas and flavour enhancers) and better nutritional values,
- Offering blended meat products,
- Reducing meat portion sizes,
- Offering meal kits or ready-to-eat / -heat meals that are healthier and more sustainable,
- Optimizing naming, labels and packaging for the most important target group.

Price: Using a price strategy that is expected to increase consumer demand. For example, price parity for alternative products means meeting or going below the prices of animal-based counterparts, as initiated in Germany by Lidl[32] and widely implemented in Belgium[33] for example.

Placement:

- Placing alternative products next to their animal-based counterparts and in a separate vegetarian shelf,
- Creating a dedicated dry plant protein section,
- Testing and leveraging in-store nudges including placement initiatives,
- Optimizing "placement" on online sales channels**.**

Promotion:

- Showing directly and transparently what is healthier and more sustainable, e.g. with:
  - In-store promotional signs like labels, dividers, wobblers, etc.,
  - Online banners and descriptions,
  - In consumer applications that compare the purchases to personal targets and/or nutritional guidelines,
- Including plant-based options in cooking menus, e.g. before Christmas, Easter, etc.,
- Running promotion campaigns dedicated only to alternative protein products,
- Balancing promotions and recipes in line with the targeted sales of the respective product categories,
- Positioning product categories in the order of prioritization for sales objectives,
- Sharing actionable advice on how consumers can easily and with a clear target establish step-by-step a more sustainable and healthier diet,
- Creating national promotion campaigns for specific dishes or ingredients together with several retailers and more stakeholders,

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[32] Schwarz Gruppe, "Preisparität und Proteinstrategie bei den Unternehmen der Schwarz Gruppe" https://gruppe.schwarz/content/story-preisparitaet-und-proteinstrategie

[33] Stefan Van Rompaey, 17.12.2025.; "Huismerken maken plantaardige alternatieven goedkoper". Retail Detail Nieuwsbrief, https://www.retaildetail.be/nl/news/food/huismerken-maken-plantaardige-alternatieven-goedkoper/

- Using choice architecture (consumer nudges) along the whole consumer journey, especially in online grocery retail, in the following three areas:
    - Decision information, e.g., by making sustainability information visible and easily understandable by presenting CO_2e emissions;
    - Decision structure, e.g., with climate-friendly categories, sorting, and default choices;
    - Decision assistance, e.g. with health and sustainability goal-setting options and climate-friendly subscriptions,
- Creating and broadcasting influential commercials on TV and/or social media,
- Offering employee training so they can create better offers and give advice to customers,
- Involving customers in health challenges to purchase more alternative protein products.

Indirect measures, including strategies and other internal measures, cooperations, and working with other stakeholders[34]

Strategy and reporting: For example, specific targets, an actionable plan & comparable reporting. A protein diversification strategy can be connected with sustainability, nutrition, or other ESG targets.

Other internal measures:

- Starting with a clear position towards protein diversification to create a base for strategic decisions and work with policymakers or other stakeholders,
- Focusing on proactivity, an entrepreneurial spirit, and an intrinsic motivation when hiring people for key positions, e.g., sustainability, buying, marketing, and strategy,
- Building an innovative culture of including health and sustainability aspects in any private label product development,
- Creating internal working groups to advance the strategy or specific focus units on e.g., FoodTech, BioTech.

Cooperations:

- Collaborating along the whole value chain to enable a resilient supply chain while growing demand at the same time to increase the success chances of investments in new production and processing facilities at all stages of the value chain,
- Cooperating with other demand-driving actors to create a strong and consistent push on the dishes, ingredients or products that could be integrated into daily consumer habits,
- Investing in alternative protein companies for long-term cooperations,
- Running start-up cooperation platforms to bring new products quickly into stores, profit from potential new product hypes, and to stay an “innovative retailer”,
- Running product contests to test the best innovations in the store,
- Informing consumers via scalable campaigns, e.g., about:
    - Health and nutrition, including practical cooking advice and lessons,
    - Sustainability from a climate and an overall environmental point of view,
    - Farming and the overall origin and production of different foods,
- Cooperating with suppliers to adjust the brand assortment and foster innovation,
- Cooperating directly with farmers to enable stories about local plant proteins for:
    - Specific local brands that display local production,
    - As part of an overall product range with European sourcing,

[34] In compliance with all relevant EU and national rules on competition

- Enabling specific trainings for cooks in food service to increase uptake of products based on optimized recipes and presentation.

Working with stakeholders – including policymakers – on alternative protein sector development:

- Supporting the creation of joint objectives at national and European level based on dietary guidelines for orientation,
- Requesting overall national support, e.g., in the form of:
  - A Plant-Based Action Plan (or a holistic strategy for protein diversification),
  - A trade association dedicated to advancing protein diversification (inspired by alternative protein associations),
- Activating public support specifically to increase demand, e.g., by:
  - Public education about healthy and sustainable diets,
  - Support of public promotions of healthy and sustainable diets, including for specific ingredients or dishes, like in the "Bean Burrito Campaign" in Denmark,
  - Public procurement targets in line with dietary guidelines or strategies,
- Working towards a level playing field, e.g., with:
  - The same VAT for comparable everyday goods,
  - Clarity and alignment on naming, claims and labelling conventions,
- Accelerating innovation by requesting, e.g.:
  - Acceleration of the novel food authorisation process, while ensuring high food safety standards and environmental risk assessment, e.g., by increasing resources and improving administrative processes,
  - Public funding for research and development of high-potential solutions, including crop optimization and product development,
- Supporting voluntary transitions of value chain players by requesting, e.g.:
  - Knowledge and guidelines for transitions of value chain players,
  - Financial transition support for critical stakeholders in the value chain,
  - Financing options for scaling up the required facilities for new value chains,
- Supporting research to enable a clear and aligned science-based direction, e.g.:
  - Simple and uniform measuring and reporting methodologies (e.g. for CO_2),
  - Clarity on health and nutritional aspects between different foods, especially in areas of large public discussions and disagreements,
  - Clarity of sustainability aspects to target the most effective levers,
- Hosting conferences and speaking up publicly about the topic,
- Joining proactive alliances.

Evaluation of some measures with comparably little investment and potentially large impact

It is only sometimes possible to accurately quantify the direct impacts of the measures described above to increase protein diversification within a limited timeframe. Even when a clearly looking result of the impact quantification is feasible, the results remain challenging and only moderately reliable because many other factors influence outcomes.

Therefore, starting with implementing measures with comparably little investment can be the easiest way forward. Strategically evaluating the potentially most impactful measures, of which many require more investment, can help to prioritize the next steps.

Potential measures that could require comparably little investment

Promotion visibility: Giving more visibility to promotions of plant proteins and other alternative protein products could be an easy step to help increase plant-based sales while still promoting animal-based products in basically the same way.

For example, increased visibility can be achieved by showing plant-based options first, more often and literally with larger sizes in regularly updated promotional materials, such as leaflets or Out-of-Home marketing campaigns. This could be possible without additional effort, except for marginal adjustments to existing marketing processes.

Supporting existing initiatives: Joining or co-signing existing initiatives can be a comparatively easy step with relatively small efforts that might help to initiate larger changes in the future.

Placement: Both placing plant-based alternative products next to their animal-based counterparts and pointing out popular pulse products together on their usual shelves and in promotional spaces. This measure can require comparably little effort when focused on private-label products (whose placement retailers can freely decide) and when done as part of the regular shelf-position optimization (planogram).

Potentially most impactful measures that retailers and wholesalers can take consistently towards a longer-term protein diversification target

Price: Price is critical for consumer acceptance, as price-sensitivity was mentioned several times in the survey and interviews. Grocery retailers in Germany, the Netherlands and Belgium widely implemented a price strategy that aims for price parity of private-label alternative products with their animal-based counterparts to increase alternative protein sales. At Lidl Germany for example, the price parity strategy was associated with a 30% sales increase of plant-based products.[35]

Price parity can require comparably little investment when some prerequisites are met:

- If current product prices are only slightly higher than for animal-based counterparts, and
- If the price decrease leads to a higher number of units sold, and
- If the increased number of units sold leads to lower costs via economies of scale effects, and thus overall more profit from the relevant products.

Required investments and additional revenue potential depend on the individual products, current prices, and the respective price elasticity.

Product:

- **Assortment expansion:** The access to a tasty variety of affordable plant-based products has been a main driver of increased plant-based sales across retailers.

[35] Lidl, 07.11.2024. “Studie bestätigt: Lidl hat den günstigsten pflanzlichen Warenkorb”, https://unternehmen.lidl.de/verantwortung/csr-news/subitems/2024/20241107_proveg-preisstudie

- **Reformulation of plant-based products**: Removing additives and other “unnecessary” ingredients to create a “cleaner” label and improving nutritional values can increase consumer acceptance of plant-based products.
- **Health-focused optimization of the existing product assortment**: Integrating relatively small amounts of alternative proteins and other plant-based ingredients in composite products can be a very effective way to increase protein diversification and enable healthier nutrition without requiring a change of product choice or drawbacks on taste and texture.
- **Product innovation:** Enabling a better product quality (taste, texture, smell, appearance, convenience) is expected to create more consumer demand for alternative protein products.

Proactive alternative protein sector development – including working with policymakers: Education and public procurement, research, scale-up funding and market access regulation are the most important levers to enable the growth and quality of alternative proteins, and they are all in the hands of governments. Proactively working with other stakeholders on the development of the alternative protein sector is important for removing barriers and creating support mechanisms. For example, speaking up about how certain changes are beneficial for the value chain and civil society could initiate corresponding adjustments by policymakers.

Clear objectives, strategy and reporting: A clear target, an actionable plan and regular analysis of the effects of existing measures are driving consistent progress.

Cooperations:

- **Value chain collaborations:** Joint action is essential to lift the system on a new level because demand and supply cannot move individually but need each other to develop.
- **Demand driving cooperations:** Joint campaigns with gastronomy, public procurement, media and/or influencers have a larger chance of influencing food culture and establishing tasty dishes as new favourites.

Targeted promotions and nudging: Showing consumers directly what is healthier and more sustainable, for example with in-store signage, digital nudging or comparing purchase decisions with dietary guidelines in consumer applications, enables consumers to reach their own nutrition goals.

Internal (cultural) actions: If company leadership actively supports protein diversification and intrinsically motivated persons work in key positions, this can lead to greater employee engagement and thus more ideas and better implementation of measures.

Illustrative visualisation for gross comparison and as inspiration for future research

To provide a gross ranking for orientation and prioritization, the described measures can be compared based on expectations of their impact potential and hypotheses about the required investments or efforts.

Figure 14 shows an approximate visualisation of the above-explained measure categories and some sub-areas based on logical conclusions from the report research that put these measure categories in relative positions to each other in a scatter diagram.

For a more robust comparison, a quantitative analysis is required.

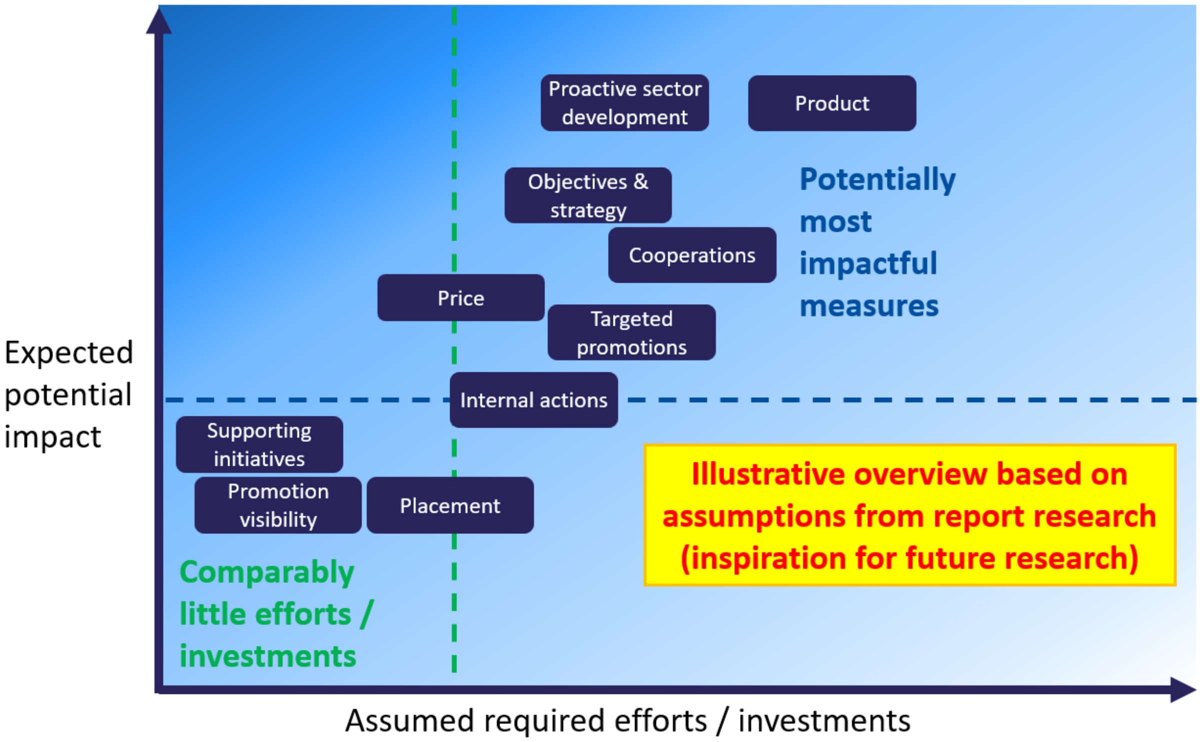

Figure 14: Approximate visualisation of possible positions of the measure categories and some sub-areas in a matrix of assumptions for impact potential and required investments or efforts based on the report research. Above the blue dotted line are the potentially most impactful measures and left of the green dotted line are the "low-hanging fruits". Future research on the topic may use this visualisation as inspiration for quantitative evaluations.

More detailed evaluations of the measure categories and the individual measures are helpful for prioritizing potential next steps wherever relevant, e.g., at the individual company level, but potentially also at national or an overarching European level.

To enable a good decision-making process, such evaluations should dive deeper into:

- The total potential impact (e.g., in terms of alternative protein sales),
- Other effects of the measures based on their position and in the food system,
- The additionality to other measures and overlaps between the measures (e.g., creating objectives and a strategy will influence most other measures),
- The feasibility of implementing measures at an appropriate risk level (e.g., step-by-step working on product innovation within realistic timelines and technological possibilities), and
- The overall success chances of reaching the total impact potential.

Such evaluations should also cover more accurately the required investments and efforts for retailers and wholesalers.

Interviews about best practice initiatives

The following interviews present the individual actions and opinions of the interviewed companies and organisations only.

Interview

Clément Tischer, Head of FoodTech at REWE Group, explains the potential of investing in alternative protein technologies.

"With [our investment] LEKKA, for example, we had one of the most successful new product launches by a new company in 2025."

Q: **Which synergies do you have between your investments and the daily retail business?**

A: We only invest in companies with which we can develop products and whose technology we can use to further advance our product range strategy, i.e., to launch new products on the market or use innovative ingredients to further develop our private label ranges.

Q: **What was the most important argument for starting this initiative?**

A: Per se, it is the promotion of topics that drive the transformation of the food industry. **So, it is really about consciously not only giving innovation a chance but also supporting it.**

I think it's also worth mentioning that we have ambitious sustainability goals and that **Food-Tech is one of the areas where we see relatively high potential to support us in achieving these goals**.

Q: **How much impact did this initiative have so far?**

A: Generally speaking, we naturally strive to make a positive impact, and alternative proteins have the potential to offer products that are much more resource efficient. It's worth mentioning that **with LEKKA, for example, we had one of the most successful new product launches by a new company in 2025**.

It is important for us to emphasize that we are not trying to replace animal proteins one-to-one with plant-based proteins, but rather to shift the overall mix in favor of plant-based proteins. **The goal is**

always to offer our customers the best and most balanced selection possible, so that they can ultimately decide for themselves what they want to eat.

Q: Which further developments and effects of your initiative do you expect in the future?

A: We want to be able to bring products to the market together with startups that close the sensory gap between animal and alternative proteins, so that in addition to achieving price parity, which is of course important, we are also striving for sensory parity. We hope that these new technologies will enable us to develop and distribute products that are truly suitable for the mass market.

Q: Which additional benefits do you see in similar measures to increase the protein diversification in your company?

A: I believe that **diversifying proteins enables greater resilience in the supply chain against external influences.**

Protein diversification can also promote the cultivation of native plants. When we talk about peas, field beans, etc., we also have the opportunity to integrate them in the local agriculture. In general, of course, we also aim to relieve the value chain through diversification, thereby perhaps increasing the quality of the supply in general.

Global population growth in the coming decades is expected to require an increase in the supply of protein, which means that **alternative proteins offer a very good and sustainable way of meeting this additional demand.**

Figure 15: The plant-based cold cuts from Lekka was one of the most successful new product launches by a new company in 2025 at REWE

Interview

Martijn Versteegh, Program Director Sustainability at Albert Heijn, explains their private-label assortment strategies to increase protein diversification.

"Changing the food system is a shared responsibility, and protein diversification is one of the most important steps to make diets healthier and more sustainable."

Q: **How many plant-based private label products do you have under the new plant-based brand?**

A: We currently have ca. 350 plant-based private label products under our AH Terra brand.

Q: **On which categories are you focusing and why? How important are traditional plant-based products compared to alternatives or blended products?**

A: We are focusing on all of them. That includes traditional plant-based products like beans, grains and legumes, but also animal protein alternatives and hybrid or blended products. **We believe it is important to offer plant-based options across all categories**, because different consumers have different entry points into eating more plant-based.

Q: **How was the consumer reaction to the new brand and how did you promote it? Which changes could you see in purchasing behaviour?**

A: When we launched AH Terra, we supported it with a large campaign to really put plant-based food in the spotlight. **One of the main barriers for consumers is still taste, so our first goal was to get people to try the products.** We did this through tastings in stores and strong promotion at launch.

We have also been running campaigns such as the “Enjoy the Good Food” initiative together with Unilever and the Dutch Lottery, which helps bring more attention to plant-based categories and attracts consumers into our stores.

In general, **we do see that many customers say they want to eat more plant-based, but there is still a gap between intention and action.** People often fall back into previous shopping routines, or they feel plant-based is less convenient, less tasty or more expensive.

Q: What was the most important argument for starting this initiative?

A: For us, the most important driver is our purpose: **“Together we make better eating the easy choice for everyone”**. We want to contribute to a meaningful, social and sustainable society.

We also know that the current food system is not sustainable. Around one third of carbon emissions are related to food, and animal products, have the highest impact. That is why we have set clear ambitions to shift towards a more plant-based diet.

Our target is to reach a 60:40 plant-based to animal-based protein split by 2030.

Q: How much impact did the creation of the AH Terra brand have so far?

A: In terms of the protein split, we have made progress but achieving targets remains challenging. **We see an uplift in the sales of plant-based products.** On the other hand, we also see customers eating more animal-based proteins based on the “enriched protein trend”.

Q: Which further developments and effects of the initiative do you expect in the future?

A: We will continue to expand the AH Terra assortment further. We are also working on the way we present plant-based products. In the Netherlands, very green packaging can sometimes create the impression that products are only for a specific group of consumers, so **we want to move towards branding that feels more fun, fancy and focused on taste.**

Going forward, we will place **more emphasis on plant-based protein sources such as bread, legumes and beans**, and we will continue to **grow our hybrid and blended product range**.

We also need continuous innovation to improve taste and consumer acceptance, because taste remains one of the most important factors for customers.

Q: Which additional benefits do you see in similar measures to increase the protein diversification in your company?

A: Advancing the protein transition directly contributes to achieving our climate ambitions. Shifting sales towards proteins with a lower carbon footprint can significantly reduce scope 3 emissions, thereby supporting our CO_2 reduction targets.

We believe the transition to more plant-based diets is essential, but it is not something retailers can achieve alone. **We can contribute through assortment, affordability, promotions and inspiration, but we also need consumers, stakeholders and governments to work together.**

Changing the food system is a shared responsibility, and protein diversification is one of the most important steps to make diets healthier and more sustainable.

Figure 16: Albert Heijn currently has ca. 350 "AH Terra" products on their shelves, which is marketed as the "largest selection" of plant-based options in the Netherlands

Interview

Dr. Julia Adou, Director National Sustainability at ALDI SÜD Deutschland, presents the #Ernährungswechsel as part of the national sustainability strategy.

„The #Ernährungswechsel at ALDI SÜD in Germany is guided by the Planetary Health Diet, which supports human health while respecting planetary boundaries."

Q: When did you launch your nutritional objectives and strategy and what are they focusing on?

A: In 2023, we introduced the ALDI SÜD #Ernährungswechsel as part of our ALDI SÜD Deutschland corporate sustainability strategy. A balanced diet based on resistant food systems is essential for the long-term health of both people and the planet. This is why **the #Ernährungswechsel at ALDI SÜD in Germany is guided by the Planetary Health Diet**, which supports human health while respecting planetary boundaries[36] [5]. It serves as a compass for ALDI SÜD's nutrition and sustainability strategy because it combines elements of both areas and is grounded in scientific research. **We aim to make healthy eating simple, sustainable, and affordable**. For that, we are committed to continuously increasing the share of our plant-based product range, with a particular focus on fruits and vegetables, whole grains, and plant-based protein sources.

[36] Johan Rockström et. al., "The EAT–Lancet Commission on healthy, sustainable, and just food systems," The Lancet Commission, vol. 406, no. 10512, pp. 1625-1700, 2025.

Q: To which extent is protein diversification a part of the strategy and how do you measure progress?

A: With our goal of implementing the Planetary Health Diet in our product range, we also aim to ensure the supply of plant-based protein sources. As part of our German #Ernährungswechsel journey, setting a concrete protein target is the next step - ideally in collaboration with all German food retailers. **To make our progress transparent, we have been using the WWF's enhanced methodology** since last year to classify our entire food assortment. This method allows for a particularly detailed categorization of relevant product groups within the Planetary Health Diet.

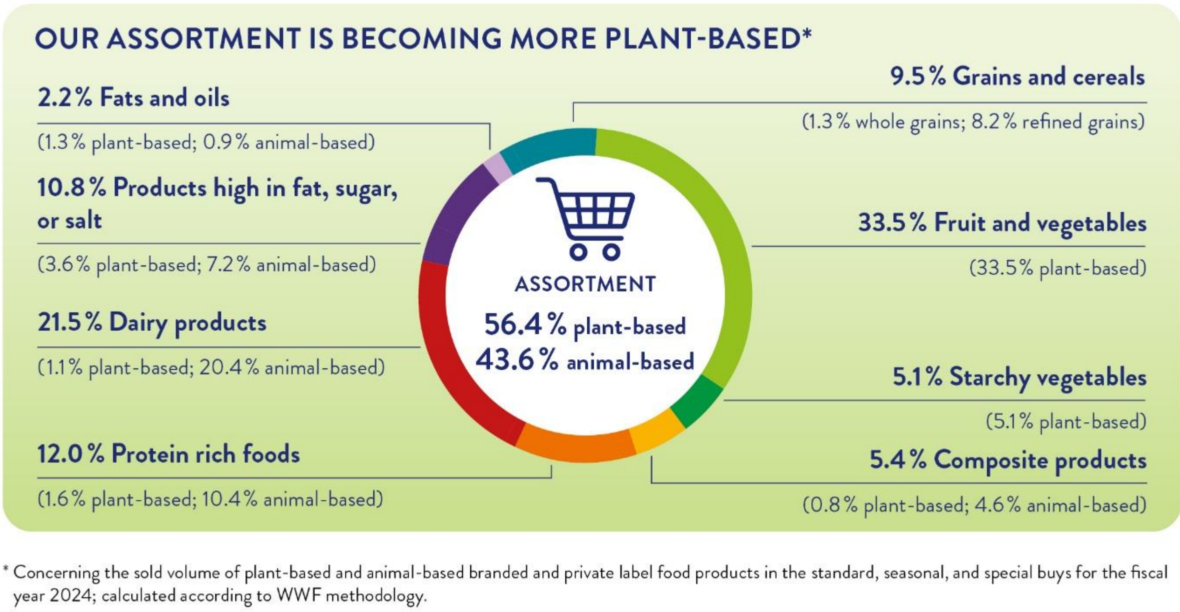

Figure 17: Assortment categorization across different food groups at ALDI SÜD Deutschland

Q: How do you engage consumers in order to make progress towards your targets?

A: Our goal is to promote an affordable and healthy diet for all current and future customers by enabling them to make informed and healthier choices. **We strive to help our customers select healthier options.** This includes reformulating existing products to improve their nutritional profile by reducing salt, sugar, saturated fatty acids and additives, while increasing fiber content and the amount of plant-based protein. In our cereal range, for example, we have already been able to reduce more than 400 tons of sugar compared to the year 2014.[37] This corresponds to approximately 17 truckloads, each weighing about 25 tons. **We also adjust our product portfolio by introducing healthier and more innovative product types and ranges**, such as plant-based alternatives. To support consumers in quickly evaluating the nutritional quality of processed and packaged foods, we provide clear and intuitive nutrition labeling. Furthermore, **we actively promote education on nutritious and balanced**

[37] All cereal products in our own-brand standard range were compared between the years 2014 and 2024. For all comparable products, the difference in sugar content was determined, and the amount of sugar saved was extrapolated based on the sales volume in 2024.

diets by sharing recipes online and sharing information through nutrition reports to encourage healthy eating habits.

Q: What was the most important argument for starting the 'ALDI SÜD #Ernährungswechsel'?

A: As a global food retailer, we recognize the important role ALDI SÜD Deutschland plays in tackling the challenges related to healthy nutrition. **We are dedicated to promoting healthier and more sustainable diets with a reduced environmental footprint.** There is a scientific consensus that switching to a predominantly plant-based diet can support the reduction of emissions[38] [6, 7]. Therefore, expanding the plant-based range is part of our comprehensive strategy to achieve our ambitious net-zero climate goals. By integrating healthy eating into our Sustainability Strategy, we strive to create a positive impact not only on people's health but also on lowering greenhouse gas emissions.

Q: How much impact did this initiative have so far?

A: In 2023, we published the first ALDI SÜD Deutschland Nutrition Report to make our German strategy, measures, and goals transparent. Since then, we have been releasing our Nutrition Report annually, sharing the progress we have made, together with interesting facts and tips on conscious nutrition, like science-based information on protein sources such as legumes or possible ways of salt and sugar reduction. **Regarding the ALDI SÜD Deutschland food assortment, the plant-based share stands at 56.4%, while the animal-based share accounts for 43.6%.**[39] We support the joint use and further development of this methodology within the industry to advance our #Ernährungswechsel. **As part of that, throughout the year, we offer more than 1,400 products labeled as vegan.**[40] **This is more than twice as many as in the year 2021.**

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[38] Poore, J. & Nemecek, T., 2018: Reducing food's environmental impacts through producers and consumers. Science. 360. 987-992. ; Rabès, A., Seconda, L., Langevin, B., Allès, B., Touvier, M., Hercberg, S., Lai¬ron, D., Baundry, J., Pointereau, P. Kesse-Guyot, E., 2020: Greenhouse gas emissions, energy demand and land use associated with omnivorous, pesco-ve¬getarian, vegetarian, and vegan diets accounting for farming practices.

[39] Concerning the sold volume of plant-based and animal-based branded and private label food products in the standard, seasonal, and special buys for the fiscal year 2024; calculated according to WWF methodology.

[40] Counted were food and cosmetic product varieties labeled with the V-Label vegan or the Veganblume (standard, special buys, and seasonal items) throughout the year 2024 in the ALDI SÜD assortment.

Interview

Jerónimo Martins

Carlos Santos, Quality & Private Brand Development Global Director at Jerónimo Martins, explains how they inspire customers to try a more diverse and healthier diet across their retail brands.

"We place fruits and vegetables at the entrance of our food stores regardless of the banner, and we actively promote the consumption of less processed food."

Q: How do you help consumers test plant-based products, recipes and a plant-rich diet in general?

A: At the heart of our private brand development lies a simple commitment: to empower consumers with trustworthy dietary options, freedom of choice and accurate information. As we operate food retail chains specialised in the quality of fresh products, we actively promote the consumption of less processed food. This starts with a special focus on fresh fruits and vegetables, while also ensuring healthy, ready-to-eat soups and meals prepared daily in our takeaway sections – always made with fresh, natural ingredients and including vegetarian options.

We do this based on our firm conviction that a diverse and balanced diet is key to healthy living. That is why we actively promote the Mediterranean diet, an immaterial heritage of humankind, which defines a role and portions for all nutritional groups of foods.

Year after year, we have been reinforcing both the availability and the diversity of healthy alternatives on our shelves. Today, across the countries where we operate, **consumers can choose from 1,880 alternative products, including gluten-free, lactose- free, vegan/vegetarian or organic**.

Providing clear and accessible information is a pillar of our approach to healthy food. **We promote literacy around product labelling and apply labels** such as Nutri-Score to all new private brand food launches in Portugal and to selected categories in Poland. This simple, easy to read system helps consumers to compare the nutritional profiles of similar products, supporting the informed choices that match their needs and values.

Figure 18: Jerónimo Martins places fruits and vegetables at the entrance of their food stores regardless of the banner

Q: Which elements did you include to make it easier for consumers to take relevant first steps towards a more diversified and healthier diet?

A: To lower the barriers to healthier food, while preserving free and informed choice, we have included a set of practical elements that help democratise access to nutritious and more diverse options, including plant-based ones. **Central to this effort is the range, availability and affordability of healthier options across all the countries where we operate**. In our stores, consumers can easily find affordable products that match their preferences and needs – which is critical for first-time trial and access. Among the several options available at our banners, we highlight two:

1) Specific ranges of private brand products, such as **the Go Active line – created especially for consumers who prioritise movement, wellbeing and an active daily life** – and **the Go Vege line – aimed at vegan and vegetarian consumers.**

2) The investments in our banners' takeaway services, ensuring that freshly prepared, ready-to-eat options are available on a daily basis. **Consumers can choose from fresh soups to meals from the Balance or Vegetarian lines available at Pingo Doce** – recipes crafted by our main chef and a nutritionist to offer varied dishes, with a high predominance of vegetables.

Clear front-of-pack information is central to helping consumers make confident first choices. That is why, besides the Nutri-Score labels already mentioned, we also use easy-to-read icons for gluten-free, lactose-free, omega-3, GMO-free or vegan/vegetarian suitability products. **Our companies also run programmes to promote healthy dietary principles (such as the Mediterranean diet in Portugal and relevant healthy-eating guides in Poland and Colombia), complemented with recipes and tips that help consumers take their first practical steps at home.**

Recipe reformulation is another key factor in our approach, making the "healthier pick" also an easy pick as we improve the nutritional profile of everyday choices without compromising taste. By doing this, between 2020 and 2024, we helped avoid the consumption of more than 5,100 tonnes of sugar, almost 900 tonnes of fats and around 240 tonnes of salt.

Finally, we prioritise children and other vulnerable groups, such as seniors, by ensuring products that meet nutritional benchmarks.

Q: How do you spread healthier products and recipes with your consumers?

A: The feedback we receive from our customers is reflected less in formal statements and more in the choices they consistently make. **What we observe is a consumer appreciation for transparent, simple information and affordable healthier options.** The solid purchase of products that carry clear front-of-pack information, confirms how much consumers value guidance that helps navigate the shelf with ease. This behaviour has encouraged us to keep expanding these labelling features across our private brand ranges.

We also see rising interest in health-focused and specialised categories. The continuous increase and wide presence of differentiated products across our banners reflect strong consumer acceptance and demand.

Finally, our educational initiatives continue to gain relevance. While product labelling is a crucial touchpoint, we use several communication channels to turn our nutritional guidelines into practical, everyday tools that help households with different levels of literacy and digital habits.

Some examples are the partnership we have in Portugal with CUF, a leading private healthcare provider, through the [A Saúde Alimenta-se] (Feeding Health) **programme, helping consumers to apply healthy-eating principles at home**. Also in Portugal, we also produce digital booklets and curated recipe collections, such as the **Receitas e Conselhos para Doentes Oncológicos** (Recipes and Advice for Cancer Patients) e-book, which includes 100 Mediterranean-style recipes and guidance for managing cancer treatment-related symptoms. These recipes also feature regularly in

Sabe Bem (Tastes Good), Pingo Doce's bimonthly magazine and the most read publication in Portugal, which also generally includes articles from the Portuguese national healthcare authority. **In Poland, Biedronka invests in educational and loyalty campaigns, such as the Gang Mocniaków** (The Strong Gang)**,** aimed at raising the awareness of younger generations to the "superpowers" of food, focusing on fresh produce. Biedronka also uses **its website** to disclose information on the Go Vege range, with articles and tips for consumers interested in increasing the uptake of vegetable proteins.

Q: What was the most important argument for starting these initiatives?

A: We can tell the story behind the Go Vege private brand. We launched it in Poland, because Biedronka saw the opportunity to provide tasty, affordable, everyday products that meet the plant-based trend without jeopardising its principle for fostering diverse diets and thus public health.

The Go Vege brand was conceived to offer a broad, good-quality plant-based range – from burgers and hummus to drinks and desserts – **made for everyone: vegans, vegetarians, flexitarians or simply the curious about new flavours.**

Another strong argument was the recognition that plant-based alternatives must be widely available and trusted in order to **support real diet diversity**. The creative strategy behind the launch emphasized exactly that point: **Go Vege sought to inspire consumers by making plant-based eating feel accessible, tasteful and free of ideological pressure, a "bloom of opportunities" rather than a restrictive shift.**

Q: How much impact did these initiatives have so far?

A: Although Go Vege is still a young brand, there are already some tendencies emerging. It has become an important contributor to the assortment diversification at Biedronka, offering plant-based products that promote diverse diets thus avoiding pressure over just one group of foods or production methods. Also, the Go Vege assortment is produced without GMOs, contributing to the Group's broader commitments on responsible sourcing and ingredient transparency.

Go Vege also supports national campaigns. **The "Roslinne Wyzwanie – Misja Oszczedzanie"** (Plant-Based Challenge – Mission Savings) **attracted nearly 7,000 people who joined the challenge to know more about plant-based proteins and how to incorporate them into their eating habits using Go Vege recipes and meal plans** – an indicator of growing consumer engagement and trial.

More broadly, plant-based food is gaining consumer traction in Poland. **There is evidence that diverse diets are rising in popularity and are not limited to specific areas.** This is also supported by the consumer uptake of other products targeting healthy lifestyles, such as Go Active, fresh soups or gluten-free and lactose-free products.

Q: Which further developments and effects of the initiatives do you expect in the future?

A: Rising consumer interest in healthier eating is shaping the demand for products and ready-to-eat meals with better nutritional profiles, less processed and diversified sources of protein, vitamins and minerals – while ensuring convenience, flavour and affordable prices.

In more developed countries, longer life expectancy combined with a higher incidence of diet-related diseases – such as diabetes, obesity or cardiovascular diseases –, reinforce the need to reduce the intake of saturated fats and to increase the consumption of fibres and plant-based proteins in the scope of a balanced and diverse diet.

We will therefore continue to enhance the nutritional profile of our products, develop and strengthen product categories such as fruits and vegetables, promote clear communication and initiatives that encourage healthier lifestyles.

Figure 19: Consumers at Pingo Doce can choose from fresh soups to meals from the Balance or Vegetarian lines available – recipes crafted by their main chef and a nutritionist to offer varied dishes, with a high predominance of vegetables.

Interview

BILLA

Verena Wiederkehr, Head of Plant-Based Business Development at Billa, speaks about their current plant-based reformulation project and the advantage of a dedicated role to align and drive all initiatives within their plant-based strategy."

"The consumption of purely plant-based foods is not a trend, but rather a sustainable development in society, and it is our job as food retailer to meet current and prospective customer needs."

Q: **How many and which type of private label products did you adjust as part of the current reformulation project "One Ingredient"?**

A: At the beginning of 2025, we screened the entire private label assortment together with the Albert Schweitzer Foundation. They evaluated each product in terms of how easily it could be converted to a fully plant-based recipe.

Based on this pre-selection, we internally assessed all products together with our dedicated product managers and created a **shortlist of 80 products. These products shall be reformulated within two years in the regular product revisions** when every private label product is reviewed in terms of taste and quality. The plant-based recipe must offer a fully convincing taste experience while ensuring commercial viability. The project is embedded in the regular revision cycle as we aim to avoid disposing of packaging materials for sustainability reasons.

In addition, we have introduced a new internal workflow for all new product developments, requiring a fully plant-based version to be included in the tender process from the very beginning wherever possible.

Q: **What were the main challenges in the reformulation and how did you address them??**

A: Our primary goal is to address a larger customer group. **Ideally, existing customers do not even notice that a product has become fully plant-based – it should still taste excellent**.

The biggest challenges are product dependent. In general, taste and texture are the most important criteria. **The product needs to have a great taste, still with a good texture and a convincing price–performance ratio**. Price is critical. We know that our customers are becoming increasingly price sensitive.

Another challenge is that some manufacturers still lack sufficient know-how in plant-based reformulation, for example when it comes to replacing eggs. Many are still at the beginning of their journey and need support, including collaboration with ingredient suppliers to integrate suitable plant-based raw materials. We encourage all manufacturers to further strengthen their expertise in plant-based product development so they can deliver high quality recipes that convince in taste, texture and price.

Q: How important is it for such initiatives to have a dedicated plant-based business developer or category manager who is a proactive innovator?

A: It definitely requires someone who holds all the threads together, motivates people, brings everyone on board, and clearly outlines the parameters of the project. In our organization, we have many different product managers who are responsible for their own categories. In addition, a central project lead coordinates all efforts.

From a broader perspective, my current role strengthens the organization by ensuring that **plant-based topics are addressed strategically and guided by someone with deep market expertise**. We continuously analyse market dynamics, including active manufacturers, current and emerging trends, areas that demand attention, upcoming challenges, and potential gaps in our assortment.

This encompasses a holistic communication and marketing strategy targeting a wider consumer base and supported by dedicated PR and outreach activities. Using the right language and messaging has enabled us to shape public discourse in a positive way and has been an important driver of our growth in Austria.

A recent example of strong media coverage was the announcement of a major milestone for our private label brand "Vegavita": the entire product range is now 100% free from preservatives, added artificial aromas, flavour enhancers, hydrogenated fats, and palm oil. Especially the elimination of preservatives and artificial aromas is noteworthy, as it is still quite rare for a private-label plant-based brand to take such a clear and comprehensive stance."

Another strategic priority is that plant-based products should be priced on par with equivalent animal-based options to strengthen affordability.

Having someone who can inspire colleagues and build a shared understanding of the strategic goals is essential. At BILLA, teamwork truly makes the difference, with a large cross-functional team working together not only to develop a more diverse and improved plant-based assortment, but also to advance all other key areas that drive the growth of the segment.

Q: What was the initiator or the most important argument for starting the reformulation initiative?

A: The basic idea was that even small adjustments can already make a meaningful difference. In many cases, it is just a single ingredient that prevents a product from being fully plant-based – creating numerous quick wins.

We are also aware that shelf space is limited. We cannot simply place a second plant-based variant next to every animal-based product. **If we want to increase the share of plant-based products, we need to evaluate what can be achieved within the existing assortment.**

There are several reasons why we aim to expand our plant-based offering: climate considerations, overall sustainability goals, and the growing demand from our customers.

Q: How much impact did this initiative have so far?

A: The initiative is still very recent, and its effects are difficult to isolate, as factors such as promotions, price changes, or timing/season can influence sales far more than a recipe adjustment. For now, our primary focus is on increasing the number of plant-based products in our assortment.

Q: Which further developments and effects of your initiative do you expect in the future?

A: We will continue to work on this topic consistently. New products are developed on an ongoing basis, and plant-based options should always be considered. Our key objective is to anchor this mindset across the organization so that it no longer needs to be managed as a separate project but becomes part of our everyday business.

In the ideal scenario, when all criteria are met, plant-based formulations will become the standard option across many product categories.

Manufacturers need to invest more in product development expertise to deliver the best possible taste at competitive prices. Without significant improvements in quality, pricing, and economies of scale, many products will not yet be ready for full replacement.

Q: Which additional benefits do you see in similar measures to increase the protein diversification in your company?

A: The consumption of purely plant-based foods is not a passing trend but a lasting societal development, and as food retailers, it is our responsibility to meet evolving customer needs. In Austria, according to a survey 29% of people under the age of 25 no longer eat meat – a shift that cannot be ignored. From an economic perspective, it would be unwise not to respond to this growing demand.

It needs proactive work to build up the market and there is also a transition phase until **younger generations eventually become the majority of our customer base. Therefore, we have to invest resources early to gain a foothold in the market.**

In addition, plant-based products have a much better environmental footprint. For reducing Scope 3 CO_2 emissions, protein diversification is one of the biggest levers we have.

Finally, there is also the health aspect. We are far from meeting dietary recommendations – national ones or the Planetary Health Diet – particularly regarding legumes and plant-based intake.

There are many drivers that make protein diversification valuable – particularly in meeting evolving consumer expectations, addressing environmental and climate challenges, and improving health.

Figure 20: BILLA immer gut Riesengermknödel (large, sweet dumplings) at BILLA Austria are fully plant-based as a result of the One Ingredient reformulation project

Interview

FORBRUGERRÅDET tænk

Maja Effersøe Khan, political adviser at Forbrugerrådet Tænk, speaks about the Danish "Bønne Burrito" campaign, a cross-industry collaboration together with major grocery retailers.

"The campaign deliberately "pushed" one single recipe – the Bean Burrito – to reduce cognitive load and increase the likelihood of adoption."

Q: What was the "Bean Burrito Campaign" and to which extent did retailers participate?

A: The "Bean Burrito Campaign" was a **nationwide Danish joint initiative between the Danish Consumer Council Tænk and a coalition of major grocery retailers in Denmark**: Dagrofa, Coop, Lidl, Rema 1000, Salling Group and Nemlig. It was a collaboration driven by a shared ambition to help consumers choose more legumes.

Our focus was on families with children, where we know there is significant interest in putting more legumes on the plate, but where making it happen in everyday life can be challenging. Consumers themselves point to inspiration and recipes as tools that can help them get started.

Therefore, **the campaign centered on communicating one simple message – one single recipe –** and essentially saturating the Danish public with it, in the hope that it would be a recipe that families with children would feel encouraged to try – and ideally incorporate into the small repertoire of meals that we know many families tend to rotate between. **The Bean Burrito recipe only contains ingredients that are easily accessible at all supporting retailers.**

The campaign was developed by the Danish Consumer Council Tænk in close collaboration with the supermarket chains and this was **the first time such a large portion of the Danish grocery retail sector united behind one shared message** together with us.

Q: How was the campaign structured and which aspects were most important to increase consumer demand for the promoted recipe and the required ingredients?

A: Instead of promoting many legume dishes or motivation factors for eating more legumes, **the campaign deliberately "pushed" one single recipe – the Bean Burrito – to reduce cognitive load and increase the likelihood of adoption.**

The campaign in general and the design of the recipe were developed in a way that gave the retailers strong opportunities to adapt and incorporate the content into their own formats, as well as scale it up or down according to their individual capacities.

The campaign was designed for broad multichannel exposure. **An important element was a film** in which the Bean Burrito appeared in all sorts of more or less exaggerated contexts: from being placed at the bottom of a shopping basket, to being rolled out on a banner from a dormitory building, to being plastered on the side of a truck and shouted through a megaphone from a moving car.

Different versions of the film were shared by all partners on social media, **while the recipe's ingredients were promoted in the individual retailer's weekly ad flyers, websites, newsletters**. Finally, the whole **recipe was shown all over the country in OOH displays**.

At the same time, we issued a joint press release highlighting the need to eat more legumes – and less meat.

The success laid particularly in the combination of bringing together an entire industry that, for the first time, **joined forces with us as a consumer organization** to communicate this shared message – which in itself became a story – and in the campaign's clear, action-oriented message that could be adapted to each individual retailer. This ensured that the campaign achieved broad reach.

Q: What should be kept or adjusted for similar campaigns in the future?

A: Many of the chains are interested in continuing the collaboration and creating a joint campaign again, focusing on legumes or vegetables in general. A flexible concept, which the retailers can adapt so it fits the individual chains, is also something that we will take with us for our next project.

Q: Who started the initiative and what was the most important argument for so many stakeholders to participate?

A: The initiative was launched by us at the Danish Consumer Council, which managed to get funding for a broader project aimed at making it easier for consumers to choose legumes, with the campaign being one of the key initiatives.

My impression is that **the retailers are well aware that they have a responsibility to make the green choice easy and attractive for consumers**. However, it can be challenging for grocery retailers (just as it is for consumers) to determine how to approach this task effectively. The campaign therefore aligned with a responsibility they had already taken on.

The grocery retailers also tell us that **campaigns work best when carried out by a broad network of partners** as in this case. Such an agenda as 'more legumes' can be difficult for a single chain to implement effectively on its own.

It also made a difference that **the campaign was largely designed with consideration for their reality and day-to-day operations**. For example, it ran in January, when the chains are already focused on communicating healthy and green messages.

Q: Could you measure how much impact this initiative had?

A: 39% of the target audience recall seeing the campaign – this is significantly higher than comparable campaigns – thanks in large part to close collaboration with supermarket chains. Of those who remember the campaign, **75% liked it or liked it very much**. The main reasons cited (open-ended responses) were that the campaign conveys an important message, is easy to understand, and is fun. **72% of those who recalled the campaign were inspired to include legumes in their cooking**, our closest measure of actual behavioural impact.

The campaign is still mentioned by our partners when I'm out and about – and **many people have a story to tell about it**, for example, that their teenage son encouraged them to make it, that their kids liked it or that they found it fun, or something similar. And I know other organisations have been inspired by the concept of one simple message – and one simple recipe, so we are content with the result.

Campaigns do not do the job of helping the consumers with this agenda alone – however this has been a good one.

Q: Which further developments and effects of the initiative do you expect in the future?

A: We are already underway with a new project called *Taste Your Way Forward* – also in collaboration with a broad range of partners within the grocery sector. This time, it is not "just" a joint campaign, but an entire project focused on developing and testing various communication and behavioral design approaches in three different municipalities that can **help families make greener choices in their everyday life**. The goal is that over the three years the project runs, we can test a wide range of approaches and scale up the successful initiatives.

The grocery chains have expressed that it has been motivating to collaborate across chains, and the Bean Burrito Campaign has provided us with a strong foundation to build on in this new project.

Figure 21: The Danish " Bønne Burrito" recipe in out-of-home advertisement

Figure 22: A newspaper article about The Danish "Bean Burrito" campaign

Interview

David van Dooijeweert, CSR Advisor at JUMBO Supermarkten, explains their use of the Protein Tracker and how it helps them make progress to reduce emissions and offer more sustainable protein products.

"Importantly, this transition cannot be achieved by supermarkets alone. It requires collaboration across the entire food environment – including governments, retailers, restaurants, caterers, and consumers."

Q: **When did you set the first protein split target and started reporting the progress towards it? Which methodology do you use and why?**

A: We published our first protein split in 2023. We use the "Eiweet" methodology (the "Protein Tracker", which we developed together with other supermarkets, the Green Protein Alliance, ProVeg, Questionmark, and other partners. **The goal was to create one shared method so retailers could report their protein split between animal and plant-based protein in a comparable and transparent way.**

The ambition behind this methodology is to measure protein at product level to understand how much animal and plant-based protein is contained in each individual product. Once you combine that with sales volume data, you can calculate your protein split very accurately. However, this is still a relatively new metric, and collecting reliable data takes time. Suppliers need to provide protein composition data, and until that is fully available, we complement it with industry-average data. Each year, we publish the share of products based on actual data versus estimated data, and that share is steadily improving.

In October 2023, we set our target of reaching 60% plant-based protein sales by 2030. This is more ambitious than the Dutch government's national goal of achieving a 50:50 protein balance by the same year.

Q: What insights have you generated through measuring and reporting, and how has this enabled you to act more effectively?

A: The measurement work gave us much clearer insights into which categories have the biggest impact. Milk, cheese, and meat are obviously major contributors, but protein is also present in many other product groups – sometimes even in categories people do not immediately associate with protein, such as bread.

One of the most important lessons is that companies should not focus solely on meat, cheese, and dairy. Significant opportunities exist across many product categories, and sometimes the biggest improvements come from areas that are initially overlooked. Plant-based staple foods such as grains, breakfast cereals, and legumes can offer strong potential for improvement and often deliver additional health benefits.

This broader view helped us identify where we can make the biggest difference. It also showed us that focusing exclusively on meat alternatives is not enough. Plant-based meat and dairy alternatives still represent a relatively small share of overall protein consumption. **We therefore need to consider other high-volume product groups such as beans, nuts, cereals, and bread.**

For example, bread – and especially wholegrain bread – contains a significant amount of protein. Changes in bread consumption can sometimes have a larger impact on the overall protein split than promotional campaigns for plant-based meat alternatives.

Another key insight is that innovative products, including enriched or blended products, can help shift the protein balance without requiring consumers to drastically change their eating habits. Increasing plant-based protein intake by integrating it into familiar products can be very effective. An important condition here is that the taste of these products should be similar or even better.

At the same time, increasing plant-based protein alone is not sufficient. The impact becomes much stronger when plant-based products replace animal-based proteins. For example, increasing bean consumption instead of meat delivers a double effect on the protein split.

Q: What was the main motivation for starting the protein split reporting?

A: CO_2 emissions were a major driver. **Animal-based products represent one of the largest contributors to food-related emissions, and reducing their impact is therefore crucial for achieving climate targets.**

However, sustainability was not the only original motivation**.** In the early stages, food security was also an important consideration. Europe is currently highly dependent on imports of animal feed and other agricultural inputs from outside the EU. **Diversifying protein sources and strengthening local plant-based production can improve supply security and resilience.**

At the same time, improvements can also be made within animal-based production, for example by reducing emissions related to animal feed. **The transition is about improving balance and sustainability across the entire food system and not about eliminating animal products**.

Q: How much impact did this initiative have so far?

A: We are already seeing positive developments, particularly with blended or enriched meat products that combine animal and plant-based proteins sourced from European agriculture. These types of products were not widely available before and are now gaining traction.

Progress overall is gradual. Trends such as the growing popularity of high-protein diets can sometimes slow the transition because they often drive increased consumption of dairy products. At the same time, improved data quality has allowed us to better track developments, and we have seen modest improvements in recent years.

Importantly, this transition cannot be achieved by supermarkets alone. It requires collaboration across the entire food environment – including governments, retailers, restaurants, caterers, and consumers. Ultimately, protein diversification is a cultural shift as much as a supply chain transformation.

Q: Which further developments and effects of the initiative do you expect in the future?

A: We expect blended products to continue playing a significant role, and we are also exploring similar opportunities across other assortments. Taste remains the most important factor for consumer acceptance, so new products must meet consumer expectations first and foremost.

One barrier we encounter relates to product naming regulations that limit the use of names for plant-based products. Terms such as "milk" and "yogurt" are legally protected, which can make it difficult to market alternative or enriched products in ways that consumers easily understand. If consumers do not recognise familiar product terminology, adoption can be slower. Similar regulatory challenges may also arise for meat-related product names.

Another challenge is that the transition is sometimes framed as pushing consumers toward vegan diets, but that has never been the objective. **The goal is to create a healthier and more sustainable balance between plant-based and animal-based proteins, while also improving the sustainability of animal products themselves.** It is good to realise that, when explained properly, the general opinion of consumers (at least in The Netherlands) is that a more balanced diet is favourable.

Q: Which additional benefits do you see in similar measures to increase the protein diversification in your company?

A: The primary benefits are environmental and health-related.

Protein diversification also opens opportunities for strengthening European and local agricultural supply chains. Many plant-based protein crops can be grown within Europe, including in the Netherlands. **Increasing local sourcing allows retailers builds stronger connections between farmers and consumers while reducing dependency on imported raw materials**. This creates a compelling sustainability story and supports regional agricultural development.

Figure 23: Illustrative image of the new range of plant-based meat alternative products at Jumbo

Interview

Minna Vakkilainen, Senior Vice President Marketing, Data and Digital services at Kesko, introduces some sustainability and nutrition features of the K-Ruoka app.

"We want to help customers make choices that are beneficial for their health and at the same time aligned with their own values and goals."

Q: What is the K-Ruoka mobile app and how many people does it reach?

A: The K-Ruoka grocery trade app is an over one-decade long development project, continuously evolving to make grocery shopping and individual choices easier. **Today K-Ruoka app serves over 2 million users (36% of Finland's population)** and what makes our application unique, is its ability to stand out as grocery retailer who can meet the very individual needs of each customer by delivering them tailored benefits based on their own data. Our share of loyalty sales is over 75%, which is top notch at a European level.

To outline the exceptional user satisfaction among our customers, in 2025, the app demonstrated 27% user growth and app store rating (4.5/5.0.)

There are three key figures which make our app stand out from the crowd: 1) The strong market position with 40% market share in Finnish online grocery trade, 2**) the health impact with nutrition index tracking across 13 dietary components with personalized improvement targets**, and 3) the **sustainability impact with carbon footprint tracking for 40+ product categories** since 2019.

Q: How does the K-Ruoka app help customers take purchasing decisions based on their own nutrition choices, for example towards healthier and more sustainable diet?

A: The Nutrition Index describes, with a single figure, **how well the nutritional recommendations are reflected in the customer's own shopping basket**. The Nutrition Index is broken down into 12 different sub-areas, such as red meat, fish, legumes and plant-based proteins, and vegetables. **The service helps customers improve their Nutrition Index by suggesting nutrition goals that guide them**, for example, to increase their consumption of vegetables or reduce their intake of added sugar. The Wellbeing Service supports the set Nutrition Goals through various product and recipe recommendations.

It is important for customers that information flows into the service automatically and that data does not need to be entered separately. However, when activating the Nutrition Index service, it is advisable to enter a few details that refine both the information provided by the service and the recipe and product recommendations.

The Nutrition Index is affected by information on how many people belong to the customer's household, while **the product and recipe recommendations are influenced by whether the customer wishes to follow a specific diet or avoid certain products**

Q: Which are the important features that help consumers compare their personal purchasing behavior compared to the national dietary guidelines and their own nutritional goals?

A: The K-Ruoka application has several key features that help consumers reach their own nutritional goals. **The application is primarily promoting wellbeing based on the customer's individual purchasing data and gives them the possibility to set and monitor personal goals**.

The app is basically **comparing purchases against the Finnish nutritional recommendations**. This feature includes tracking of vitamins and minerals in customer's purchases alongside promoting 13 Finnish nutritional recommendations for the goals that each customer can set for themselves. In addition, **it offers experts' ideas and advice on promoting wellbeing, as well as recipes, product recommendations and individualized benefits** that support the customer's own set targets.

Another important area of features is the sustainability and carbon footprint monitoring. **Customers can monitor the climate impacts of their grocery shopping** with relevant indicators as part of the "climate level". **They can also set goals to reduce the carbon footprint of their grocery purchases**, after which they will be provided with practical advice on how to reduce the climate load of their purchases.

The domesticity level allows customers to track how many products of Finnish origin they are buying and set goals to increase this. Customers will then be provided with recommendations of Finnish products.

Via the app, **customers can also participate in sustainability challenges**, for instance challenging themselves to reduce the usage of plastic bags.

Last but not least, smoother everyday retail experience is enabled with features such as online grocery services, including smart shopping lists and high-quality product information. Product, recipe and store searches, as well as personalized customer-specific content, product recommendations and offers **help consumers find what they want and need based on their personal goals**.

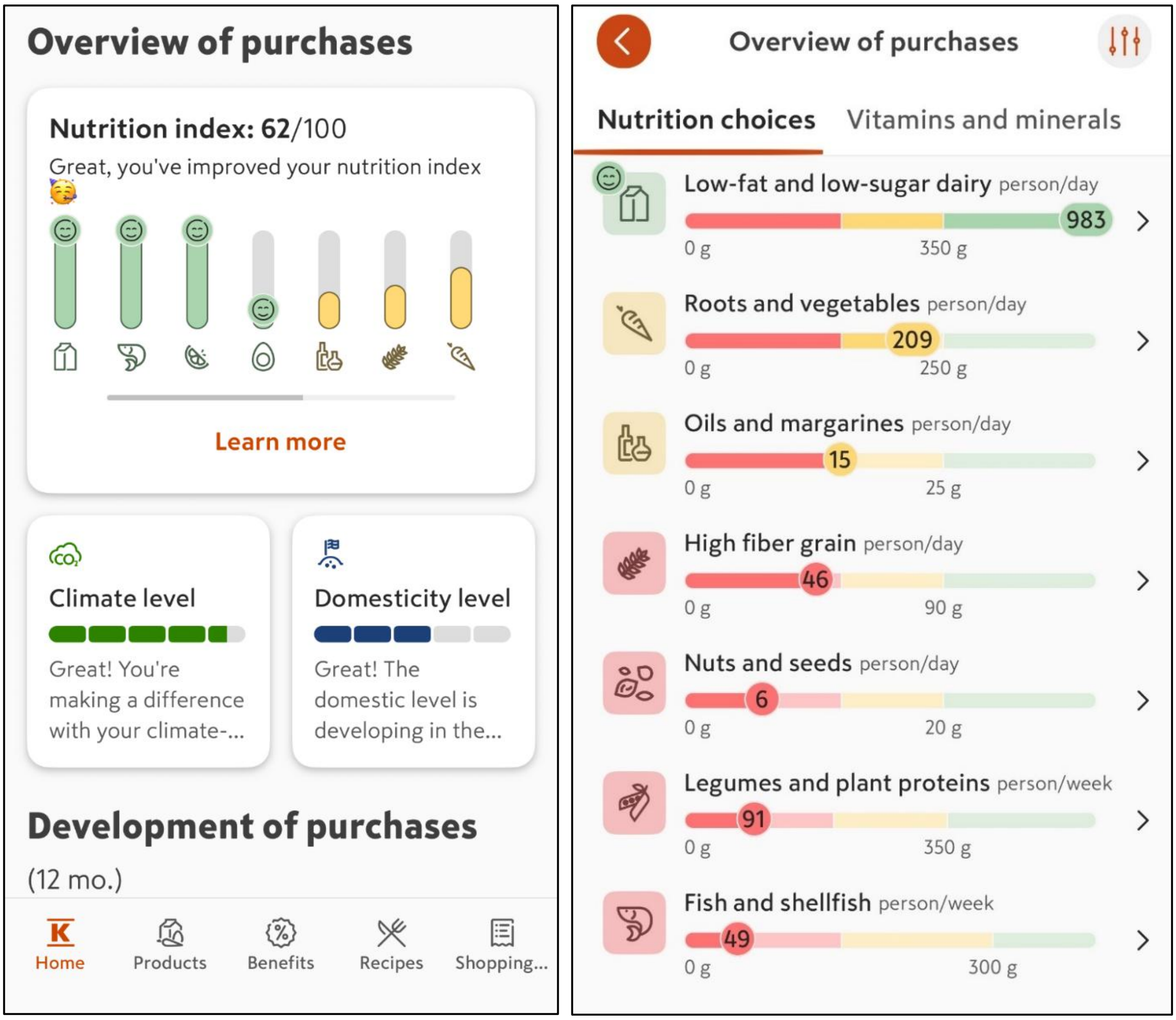

Figure 24: The K-Ruoka app shows how a customer's purchasing behaviour performs on their self-decided personal nutrition goals that are compared to the Finnish national dietary guidelines

Q: What was the most important argument for including the dietary guidelines for nutritional comparison and the climate score in the K-Ruoka mobile app?

A: Nutritious food is the foundation of wellbeing. **We develop our services based on customer wishes** and our customers consider it important to have visibility into their own purchases and tools for weighing choices and monitoring their impact.

We want to help customers make choices that are beneficial for their health and at the same time aligned with their own values and goals. It is extremely important for us to return data to customers for their own use and to provide information that genuinely helps them make everyday choices.

Q: How much impact did this initiative have so far?

A: It is impossible to measure precise impact, but even though the food market is still relatively price-driven, **well-being is definitely a growing trend among many consumers** and therefore decisively influencing what sort of food people buy. We believe this is due to many factors, for instance our sales data shows that the new national nutrition recommendations, published in November 2024, have interested consumers and have influenced what ends up in their shopping baskets.

Q: Which further developments and effects of the initiative do you expect in the future?

A: The core idea is not just to create new features. Further development of the K-Ruoka application will focus on a more seamless customer experience and smarter personalization. **The aim is to offer the most personalized solutions on the market and make everyday grocery shopping effortless**, and for K-Ruoka to be the most personalized and attractive app in grocery trade.

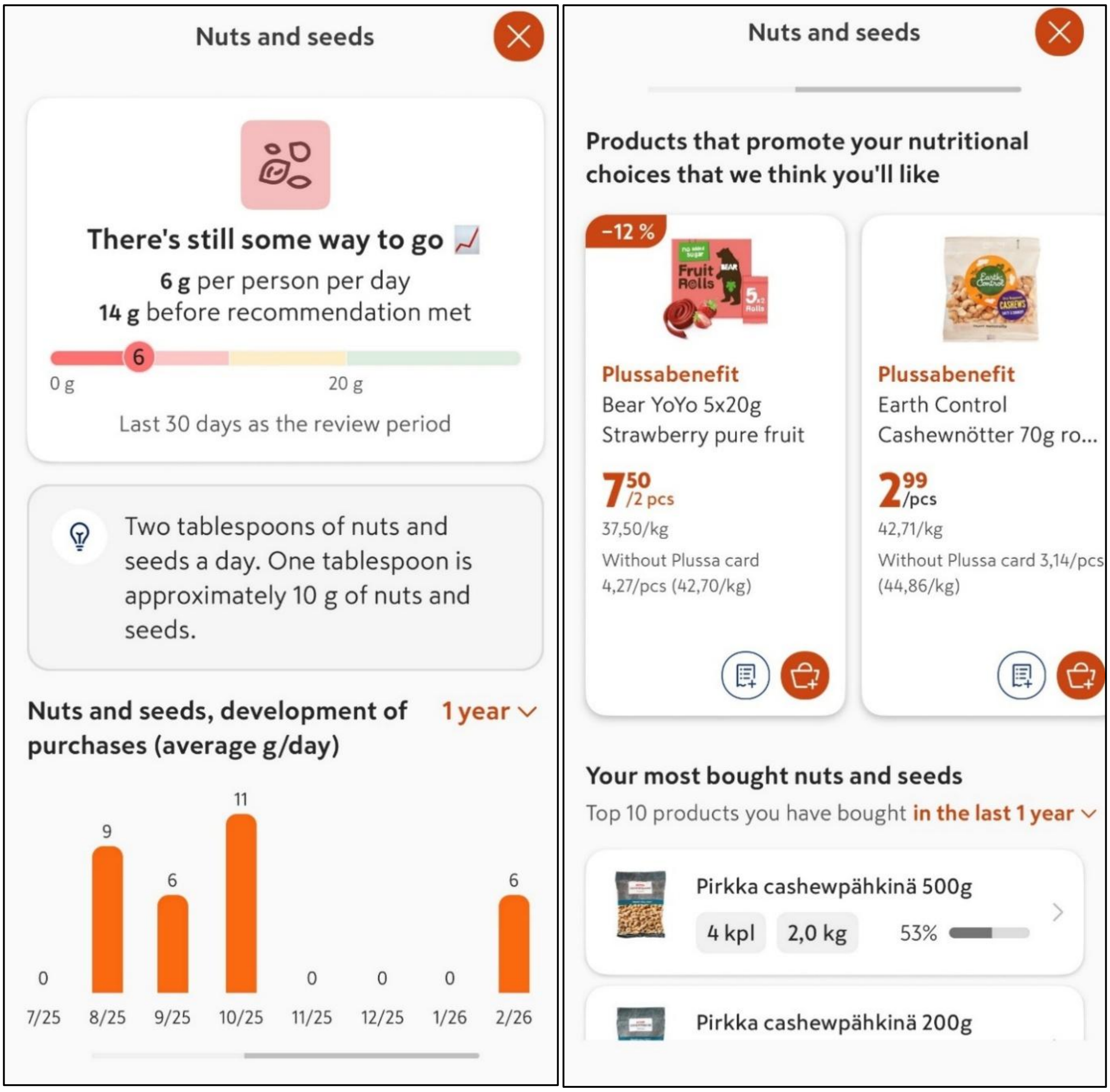

Figure 25: The K-Ruoka app also shows how closely purchasing behaviour aligns with individual targets based on the simply explained nutritional guidelines and suggests suitable products.

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