

BLUEPRINT FOR PLANT-BASED GROWTH



Realising the commercial opportunity in protein diversification | June 2026

The plant-based market is evolving, not disappearing

Protein diversification is increasingly a commercial resilience issue. We investigated the challenges and opportunities of the UK plant-based market and where commercial growth is being limited through lack of in store activation.

OUR RESEARCH EXPLORED THREE QUESTIONS

01 Where is plant-based still showing commercial momentum?

The work looked at which parts of the market are under pressure, which are stabilising, and which are showing stronger growth signals.

02 How effectively is the category being activated in store?

The store audits assessed whether plant-based products are visible, signposted, connected to relevant adjacencies and supported by communication that helps shoppers discover and buy them.

03 What would make the category more investable for retailers?

The industry conversations explored the practical realities behind plant-based growth, including fixture strategy, value perception, health and quality cues, category ownership, promotion, measurement and the role of shared learning.



KEY FINDINGS

The plant-based market is sizeable, but no longer moving as one category.

The subcategories of meat substitutes, dairy alternatives, and plant-based ingredients are moving independently from each other and require individual attention.

Distribution has scaled faster than category activation.

Products are widely stocked, but store audits show inconsistent signposting, limited shopper communication and weak meal-occasion framing.

Growth is strongest where products feel normal, useful, and easy to buy.

Stronger integration into everyday routines and fixtures has helped dairy alternatives sustain growth in drinks and yoghurts.

Ingredient-led proteins are an under-activated growth space.

Tofu, tempeh, beans and pulses align with shopper interest in protein, fibre, value and scratch cooking, but are not yet consistently activated in store.

Price, promotion and own label need a more precise role.

Price can support trial, but brand outperformance and reliance on temporary price reductions suggest trust, quality, usage confidence and repeat purchase are just as important.

Plant-Based Dairy Wins

+2.2% to £812.3m

Dairy alternatives YoY 2024-2025
(The Grocer, 2025b)



+12.3%

Yoghurt alternatives value YoY 2024-2025
(The Grocer, 2025b)



Plant-Based Proteins Wins

+15.3%, +25.2%

Tofu value and volume growth YoY
2024-2025 (The Grocer, 2025)



+736%

Tibah Tempeh retail sales value growth
YoY 2024-2025 (The Grocer, 2025)



THE CATEGORY IS STOCKED, BUT NOT SOLD

The blueprint uses an activation journey – stocked, signposted, shoppable, sold and scaled – to provide a way to distinguish between availability, which is now well established across much of the market, and the stronger retail conditions needed to support discovery, trial, repeat purchase and longer-term category development.

Activation test	Current maturity	Evidence signal
 01 Stocked Are the right products listed in the right roles?	Established	- Plant-based is widely listed, but performance is splitting by category lane. - Whole-food plant proteins represent 82% of assessed alternative protein volume, while tofu grew 15.3% value / 25.2% volume and Tibah Tempeh grew 736%.
 02 Signposted Can shoppers find it without already intending to buy it?	Under-built	- No retailers incorporated plant-based into corporate in-store communications. - No retailer reached half of the maximum execution score, and fixture signposting was partial or absent in most stores.
 03 Shoppable Are products connected to meals and missions?	Inconsistent	- Dairy alternatives show stronger routine integration, while ingredient-led proteins are still often treated as ambient staples or standalone products. - Tofu, tempeh, beans and pulses are growing, yet receive limited meal, protein, fibre or scratch-cooking activation.
 04 Sold Is activation building repeat, not only trial?	Narrow	- Promotional activity is dominated by temporary price reductions, with typical discounts ranging from 10% to 33%. - There is limited evidence of demand-building through meal occasion framing, cooking inspiration or nutritional communication.
 05 Scaled Is plant-based embedded in category decision-making?	Early-stage	- UK protein sales remain heavily weighted towards livestock-based sources, at 77% livestock-based, 12% plant-based and 11% seafood. - Only Lidl is identified in the UK evidence as having a measurable plant-based sales or protein split target.

Successful Retail Activation Across Europe



Lidl GB

Action: Committed to own-label investment in meat-free and plant-based milk, with a formal 400% sales growth target by 2025.

Result: Surpassed the target by a significant margin, reaching 694% sales growth, nearly double what was planned.

Signal: When a retailer backs plant-based with genuine own-label commitment, shoppers respond at scale.



Tesco

Action: Actively developed plant-based ranges across multiple sub-categories, including mince, whole proteins and snacking formats.

Result: Plant-based mince demand up nearly 25%; tofu, tempeh and seitan up 12%; plant-based snacking up over 5%, all within the last year.

Signal: Growth is not limited to meat substitutes. Where range and availability are developed across sub-categories, multiple growth streams open simultaneously.



Carrefour

Action: Built a coalition with suppliers to coordinate plant-based category growth across its business, with a formal sales target in place.

Result: The coalition exceeded its target, reaching €664 million in plant-based sales in FY2025.

Signal: Supplier collaboration, aligned to a shared commercial goal, can accelerate category performance beyond what a retailer achieves alone.



Lidl Germany

Action: Implemented a structured protein strategy centred on price parity between plant-based and animal alternatives.

Result: Over 30% uplift in plant-based sales within six months of the strategy launching.

Signal: Price parity is not just an ethical position, it is a direct commercial lever with a measurable and rapid sales effect.



THE GROWTH PLAYS RETAILERS CAN PULL

Activation	Growth Play	Commercial Benefit	Impact	Timeline (Months)		
				0-6	6-12	12-24
 01 Stocked Build the right product and range foundations	Build Plant-Based Ingredients Into Every Project Brief	New entry points drives frequency drives volume increases healthy sales	M	■		
	Build Plant-Based Into Range Considerations	Margin protection drives volume supply resilience	M	■		
	Review underlying drivers of performance	Range optimisation drives frequency margin opportunity	H	■	■	■
 02 Signposted Make plant-based easier to find	Improve Fixture Cues and Category Navigation	Easier discovery reduces shopper friction supports conversion	H	■	■	■
	Show Plant-Based Products in Store Communications	Drives visibility supports trial strengthens supplier co-investment	L	■		
 03 Shoppable Connect products to meals and missions	Connect Products to Meals and Missions	New entry points builds usage confidence drives repeat	H	■	■	■
	Integrate Plant-Based Products	Lifts basket size new entry points drives trial margin protection drives frequency	H	■	■	■
	Create Smarter Adjacencies	Cross-shop basket building easier meal planning drives trial	H	■	■	■
 04 Sold Build demand beyond discounting	Support Smaller Brands In Promotions	New entry points drives trial builds category credibility	M	■	■	
	Utilise Loyalty Schemes And Digital Platforms To Grow Plant-Based	New entry points drives trial drives frequency	H	■	■	■
	Take Advantage Of Key Calendar Moments And Create New Meal Occasions	New entry points drives trial drives frequency	M	■	■	
 05 Scaled Embed learning, structures and shared confidence	Integrate Plant-Based Buying Teams	Range optimisation streamlined structure stronger protein basket planning	H	■	■	■
	Use Sector Knowledge to Grow The Market and Commercial Opportunity	Drives market growth strengthens confidence sustains long-term growth	M	■	■	■

RETAILERS THAT ACT EARLY CAN BUILD ADVANTAGE

- ✓ Implement the growth plays
- ✓ Set a plant-based target and measure progress
- ✓ Get in touch for further plant-based activation support

Download the full Blueprint or Executive Summary here:



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