Plant-Rich
UK

The commercial opportunity in plant-based protein

A quick guide for commercial managers on the benefits and incentives of selling plant based proteins

November 2026

The plant-based market is sizable, growing, and no longer moving as one category.

Plant-based protein categories are stabilising after a volatile period, with **renewed growth visible** in the UK market, especially in dairy alternatives and minimally processed protein e.g. beans.

2x

Revenue across plant protein categories is projected to double by 2040, increasing from 14% to 29% of UK retail protein sales.

Retailers can help drive this growth through pricing, placement and promotion.

The commercial opportunity has diversified; meat alternatives, dairy alternatives and other plant proteins such as beans, pulses, tofu, nuts now play different roles in the basket, and sit at different stages of maturity. Commercial teams should develop different activation strategies for each plant-based protein type. Full details **here**, or for specific bean examples see **here**.

Dairy alternatives and pulses have seen the biggest growth out of the plant based protein category in the last year:

Dairy alternatives:

£812.3m

was the total value of dairy alternative sales between 2024 and 2025, representing 2.2% growth.

Yoghurt alternatives grew by **12.3%**, and household penetration reached **35%** in July 2025.

Plant-based protein:

In the first half of 2026:

+6.4% Canned and jarred beans

+7.2% Tofu

+16.7% Dried beans, peas and lentils



Tempeh +71.5%

Overall plant-based protein sales:

+7.3% in units sold

+10.1% in sales value.

External factors and consumer trends mean the demand for plant based food is not only growing, but here to stay.

The rise in demand for GLP1s is changing the market. Consumer demand is shifting toward nutrient dense, fibre rich foods.

57%



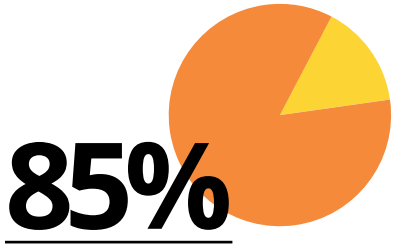
of UK customers want to eat healthier, more sustainable food.

↑ 9.6% ↑ 14.1%

Protein & **Fibre** foods saw growth in 2025-2026, ahead of total FMCG growth

1 in 4

households say health is their number one priority for the year ahead.



85%

of people are worried about food prices. They are looking for savvy ways to eat well for less.

Mandatory reporting of healthy sales is likely to come into effect. Food businesses will soon be required to disclose sales of healthy and unhealthy foods.

Protein diversification strengthens resilience as price parity approaches.

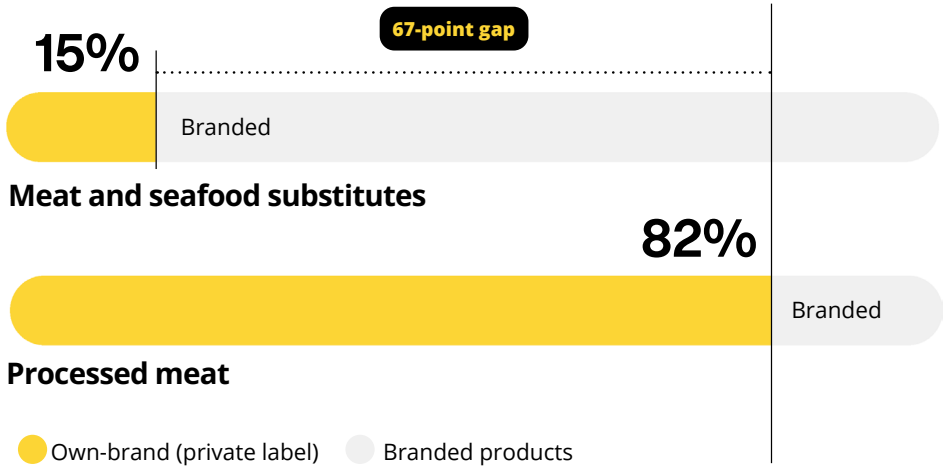
- Climate change and geopolitics are increasingly putting **food security at risk**, seen in reduced availability and rising prices of key ingredients; meat prices have increased by **42%** since 2019. Meat and dairy depend on a high volume of inputs and complex supply chains, increasing exposure to disruption. On top of this, meat is promotion-heavy and margin-compressed, leaving little buffer against volatility.
- Plant-based products **hold steadier**, mid-range margins. Beans and pulses are grown across multiple regions, so sourcing can switch if one supply is lost, and are shelf-stable at ambient temperatures, making them more **reliable through supply chain volatility**.
- Plant based meat alternatives, already **80%** of meat-substitute value and the category's main growth driver, are expected to reach **price parity** with processed meat by 2028. As the price gap narrows between plant based meat alternatives and processed meat, a significant barrier will be removed and it will become easier for consumers to switch. There remains a significant EPP price gap and retailers can get ahead and help close the gap for price-sensitive consumers ahead of the wider market by providing value-tier plant-based alternatives.

Key areas where value is being left on the table

- **Private label is underleveraged across plant-based protein categories:**

  Private label accounts for **15%** of meat and seafood substitute sales, compared with 82% in processed meat, and private label expansion represents a large commercial opportunity to cater to price-sensitive and value-conscious shoppers. For beans, own-label is delivering volume in ambient but has not yet built into the premium tier, despite clear evidence that consumers will trade up. Strengthening tier architecture within this will also benefit **volume and margin.**

Own-brand share of sales:



- **High-frequency missions are underserved:**

  Breakfast, lunch, snacking, and on-the-go are all occasions where plant based proteins have a credible role and demand, but **minimal presence.**

- **Distribution has scaled faster than category activation:**

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

- **Weight of purchase can be increased through stealth:**

  Stealth inclusion of beans and plant-based whole foods in high-volume formats like ready meals, sauces, meal kits and through stock-up mechanics can support cost-effective protein diversification, while increasing accessibility and familiarity.

- **Plant-based products are under-positioned on health:**

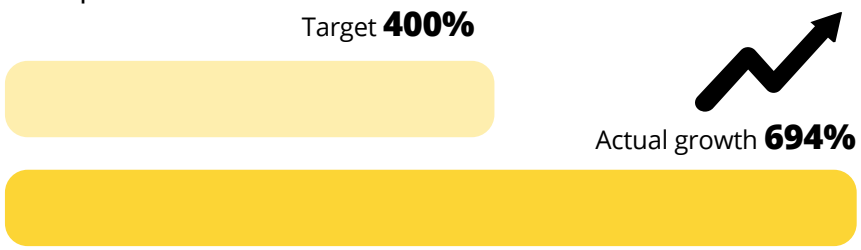
  Shoppers are increasingly seeking high-protein, high-fibre, nutrient-dense foods, a shift accelerated by the rise of GLP-1 medications but extending well beyond GLP-1 users. Many plant proteins, particularly beans, pulses, tofu and tempeh, naturally meet these needs, yet they are rarely merchandised or communicated on their nutritional credentials. Positioning them within health-led missions and messaging is a clear, low-cost growth lever.

First movers proving the model

Lidl GB

01
First movers proving the model

- **Action:** Committed to own-label investment in meatfree and plant-based milk, with a formal 400% sales growthtarget by 2025.
- **Result:** Surpassed the target by a significant margin, reaching 694% sales growth, nearly double what was planned.

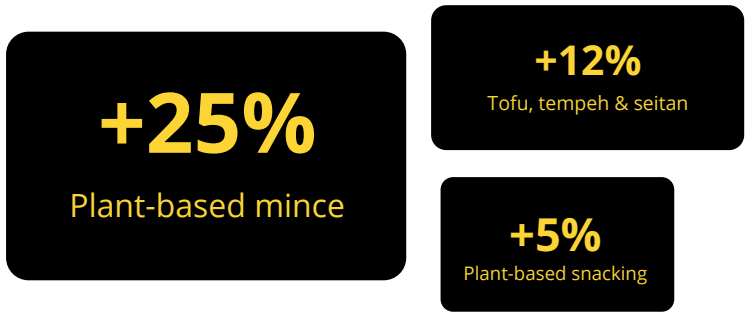


- **Signal:** When a retailer backs plant-based with genuine own-label commitment, shoppers respond at scale.

Tesco

02
First movers proving the model

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



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

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Ready to unlock the opportunity?

Explore the resources below for practical insights, market projections and strategies to help grow plant-based protein sales.

Full commercial blueprint

Beans commercial playbook

Market projections

Plant Rich UK call to action

proveg international · madre brava · WWF · Eating Better · The Food Foundation