

S Y S T E M I Q

Taking Root: The Case for Plant-Based Proteins in UK Retail

Executive Summary

22 April 2026

Introduction

This report examines the accelerating evolution of the UK plant-based protein sector and quantifies the significant economic, environmental, and health benefits of protein diversification.

While the European market is already shifting, with major Dutch retailers targeting a 60% plant-based / 40% animal-based protein split by 2030, the UK is now showing renewed momentum. Leaders like Tesco and Lidl report that the category has returned to growth, with Lidl's own-label meat-free and plant-based milk sales reaching a 694% increase against its original 400% targetⁱ.

Despite this progress, the UK still has substantial headroom compared to leading European markets. By diversifying their portfolios, retailers can reduce exposure to the price volatility of animal proteins while strengthening long-term margin stability.

This study provides a strategic roadmap for retailers to capture this opportunity. It outlines the growth potential of the UK plant-based sector, quantifies the economic, environmental and health impacts of protein diversification, and highlights the strategic levers retailers can use.

Methods overview

The analysis covers four product categories assessed in full: meat analogues (aimed at replacing meat in taste and texture); minimally processed plant proteins (including tofu and tempeh); legumes (including peas and beans); and nuts. These span whole foods through to processed alternatives and represent the main commercially relevant plant-based segments in UK retail today. A fifth category, precision fermentation, is included as a case study to illustrate the potential of ingredient substitution as a key lever for protein diversification within retail portfolios. The analysis draws on Euromonitor and NielsenIQ retail sales data, consumer research, and life-cycle assessment evidence to outline a high-ambition scenario for the UK's protein transition through 2040.

Outcomes relate to these five categories and do not represent a full projection of retail protein diversification in the UK. Categories such as ready meals, blended meat products, and staple protein sources such as grains are excluded due to limited data granularity, though we recognise their relevance for achieving broader protein diversification.

Future sales projections are modelled using an adoption framework combining three drivers:

- **Behaviour:** Extrapolation of Euromonitor sales data (2015–2025), reflecting growing consumer movement toward plant-rich diets.
- **Price:** S-curve modelling, where growth accelerates as categories approach price parity with animal proteins. Price parity assumptions were developed in a previous projectⁱⁱ. Underlying demand growth draws on FAO projections.
- **Retailer action:** Additional uplift of 33% applied to behaviour-driven growth and 20% on the price effect, reflecting the impact of pricing, placement and promotion, based on evidence from retailer interventions, and informed by interviews with UK retailers throughout this project.

The model outcomes represent a top-down, high-ambition scenario, not a bottom-up attribution of individual levers. Three scenarios are used throughout the exhibits:

- **2025 baseline:** current retail sales volumes across the five assessed categories, derived from Euromonitor and NielsenIQ data.

- 2040 business-as-usual (BAU): extrapolation of 2015–2025 sales trends to 2040, assuming no change in price, behaviour or retailer action.
- 2040 projection: BAU plus the modelled effects of price convergence with animal proteins, shifting consumer behaviour, and retailer action (pricing, placement, promotion).

Key findings

1. Plant-based proteins have a bright future in the UK

Plant-based protein categories are stabilising after a volatile period, with renewed growth visible in the UK market. Over the past decade, most categories have expanded in both value and volume. After rapid expansion and a dip from a 2020 peak, the meat substitutes category is recovering. Chilled meat and seafood substitutes grew 5% in retail sales value from 2024 to 2025.

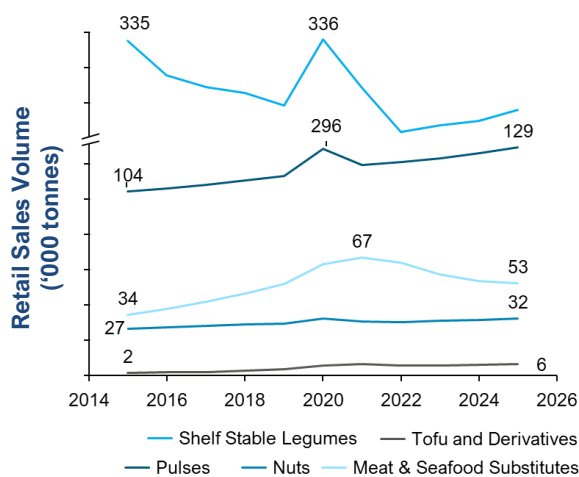


Figure 1. Retail sales value and volume by category, UK, 2015-2025.ⁱⁱⁱ

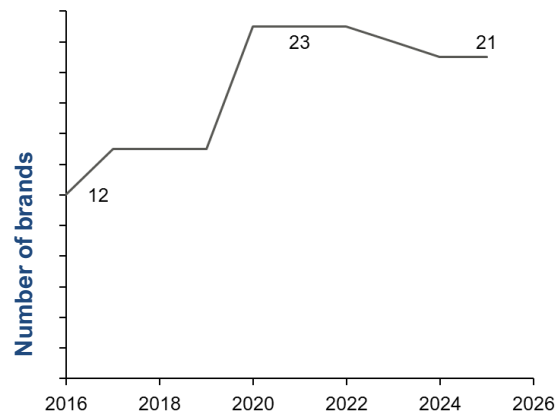


Figure 2. Meat and seafood substitutes: brand consolidation, 2016-2025.^{iv}

Across the assessed categories, **the plant-based share of protein sales is projected to rise from 14% in 2025 to 29% by 2040.** Growth is driven primarily by legumes and meat analogues, which represent the largest plant-based protein volumes in the 2025 baseline. The business-as-usual scenario is based on historic growth trends. The projection takes into account the effects of price convergence and retailer action.

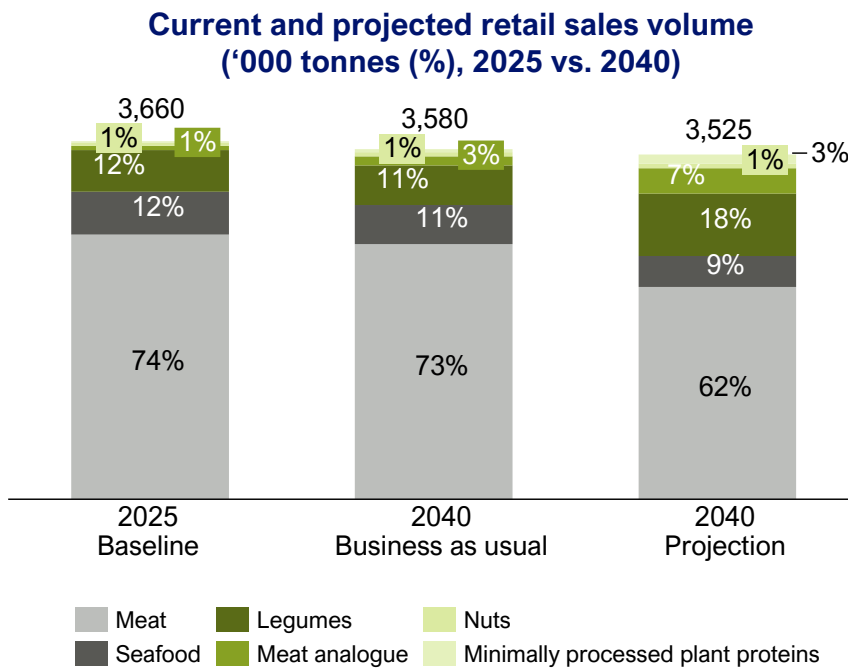


Figure 3. Current and projected retail sales volume by category, ‘000 tonnes (%) UK, 2025 and 2040.^v

2. Price parity, behaviour change, and retailer action will drive growth

The price gap between animal and plant proteins is shrinking. Retail prices for meat analogues have declined steadily since 2015, while processed meat and seafood prices have risen. Meat analogues are projected to reach price parity with processed meat by 2028. As the price gap narrows, barriers to switching decline and substitution within everyday meals becomes easier.

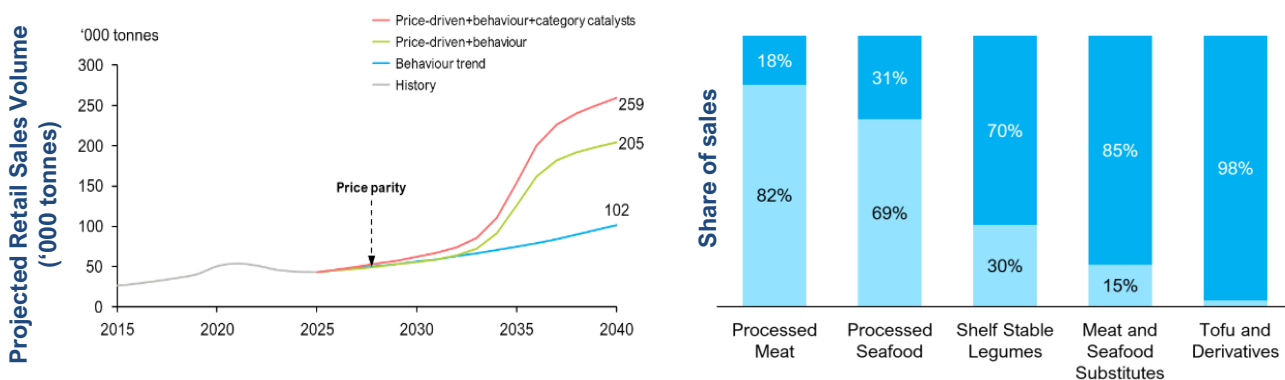


Figure 4. Meat analogue projected growth and price parity.^{vi}

Figure 5. Private label share of sales by category. Light blue represents private-label.^{vii}

Private label is underleveraged in plant-based protein. **Private -label accounts for 15% of meat and seafood substitute sales, compared with 82% in processed meat.** Closing this gap enables retailers to leverage pricing, margin and category development.

The forecast growth dynamics differ across the four protein types:

- **Meat analogues:** Approaching price parity by 2028. Meat analogues account for 80% of meat substitute value and are the primary driver of category growth. Private label expansion represents the largest commercial opportunity.
- **Minimally processed plant proteins:** Already price competitive with meat and in many cases cheaper, with the gap widening as animal protein prices rise. Underleveraged in-store.
- **Legumes:** Largest absolute volume growth potential. Consumer attitudes are positive, but uptake is constrained by limited awareness. Convenience formats and own-brand expansion can accelerate uptake.
- **Nuts:** Intake remains five times below recommended levels. Growth potential lies in positioning beyond snacking into everyday cooking occasions.

Plant-based revenue across the assessed categories is projected to double relative to business as usual. Revenue growth is primarily driven by meat analogues, given their higher price per kilogram and large absolute volume increase. Legumes deliver the largest volume growth, but their lower price point limits their contribution to total revenue. Plant-based proteins cost less per kilogram, so revenue per unit is lower than the animal-based equivalent. However, they also carry higher and more stable margins than meat and seafood, strengthening overall profitability.

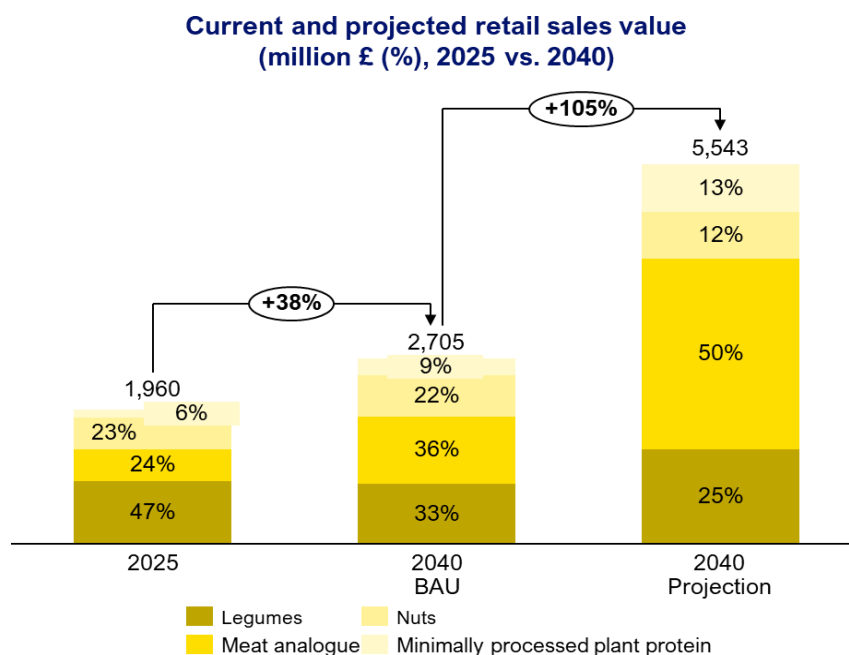


Figure 6. Projected plant-based protein revenue by category.^{viii}

Private label is underleveraged in plant-based protein. **Private -label accounts for 15% of meat and seafood substitute sales, compared with 82% in processed meat.** Closing this gap enables retailers to leverage pricing, margin and category development.

Precision fermentation enables like-for-like replacement of functional animal-derived ingredients inside existing products. Egg white makes up ~7% of baked goods volume by weight, small in tonnage but functionally critical and hard to replace without precision fermentation/ Adoption rate is the key scaling variable; current projections assume 14% uptake, but full substitution would deliver roughly 7x the impact: annual GHG savings of 1.6 million tCO₂e, land use reduction of 2,700 km², and freshwater savings of 51.5 million m³ - equivalent to 10–30% of combined environmental gains across all other assessed categories.

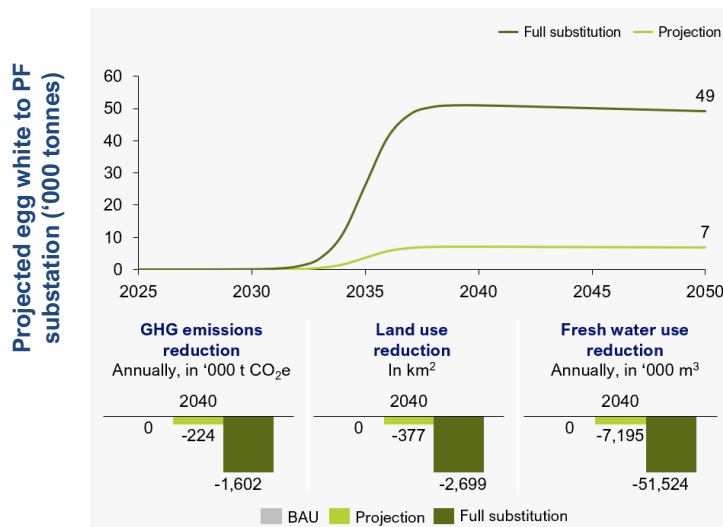


Figure 7. Projected egg white to Precision Fermentation substitution.^{ix}

3. Protein diversification reduces environmental impact and strengthens health outcomes

A shift toward plant-based proteins in the assessed categories is projected to reduce environmental impact by 13–16% versus business as usual across greenhouse gas emissions, land use, and water use. Greenhouse gas reductions are the most pronounced, reflecting substantial per-unit emission differences between animal and plant proteins. Protein diversification is therefore a key lever in delivering scope 3 reduction targets.

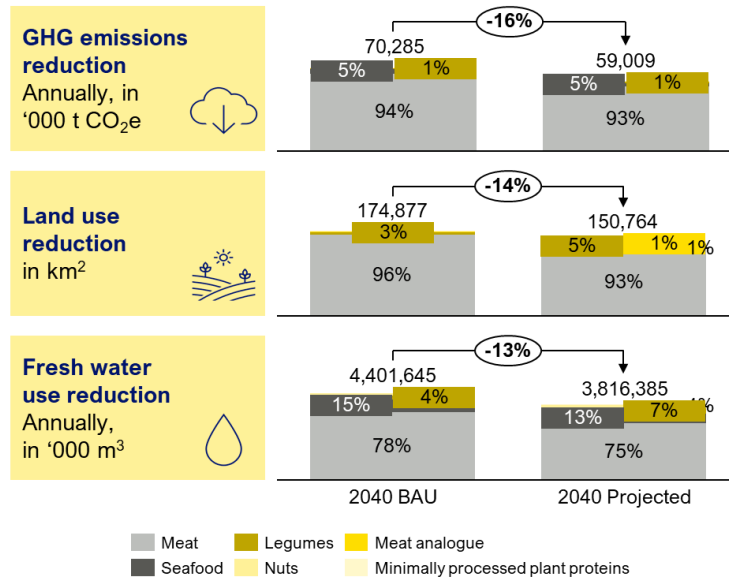


Figure 8. Projected environmental impact reduction: greenhouse gas emissions, land use and water use.^x

On health, the projected category shift would increase average daily fibre intake by 71% compared to the 2040 business as usual scenario, closing approximately 11% of the current UK fibre gap. Associated health benefits are estimated at £108 million per year.^{xi}

These categories alone will not close the gap to the protein shift we need. Amongst other actions, ingredient substitution will be key: replacing animal-derived ingredients within composite products such as baked goods, without relying on consumer behaviour change.

4. Realising the opportunity requires action across sourcing, store and system

The full report details a range of levers available to retailers. Three are summarised here:

- **Sourcing.** The primary lever is increasing the share of own-label products, which account for 15% of meat substitute sales versus 82% in processed meat. Closing this gap gives retailers direct control over pricing and margin and reduces dependence on branded suppliers.
- **Store.** Cross-merchandising and meal occasion positioning convert consumer openness into repeat purchase behaviour. Placing plant-based products alongside animal-based equivalents, supported by clear value communication, builds habit formation across everyday shopping occasions.
- **System level.** Transparent, harmonised methods for measuring protein split create a level playing field. Retailers reporting collectively against shared targets generate stronger signals for investors and policymakers. The Dutch Protein Tracker Assessment, where over 90% of retailers report annually against a common methodology, demonstrates this at national scale.

What retailers can do now

Demand for a shift towards plant-based proteins is resilient and growing. Retailers play a significant role in helping to nurture this continued growth, with benefits for health, environment and commercial performance. Supporting the shift requires focused attention within companies and at sectoral and policy level.

Retailers can catalyse protein diversification by embedding it in corporate governance:

1. Measure. Start measuring their ratio of plant- to animal-source food sales using a recognised methodology
2. Disclose. Publicly disclose the outcomes on an annual basis to create accountability and momentum
3. Set Targets. Set targets to increase their percentage of plant-based sales aligned to a trajectory towards the Planetary Health Diet
4. Take Action. Implement ambitious individual and sector-wide actions to rebalance sales towards plant-rich consumption

Beyond individual retailer efforts, sector-wide collaboration reduces first-mover risk and builds shared infrastructure.

1. Adopt a sector-wide protein split measurement methodology to make progress visible and raise ambition across the sector
2. Pre-competitive best-practice sharing through trade associations and sector working groups, reduces time and cost of iteration for all.
3. Use industry platforms and associations (e.g. BRC, IGD, NFU) to coordinate and sustain sector action outlasting any single initiative or commitment cycle.
4. Engage government jointly, bringing a coordinated retail voice to shift policy levers like updated dietary guidelines, support for growing plant-based proteins in the UK, and taxation and subsidy reform.



This is an abridged version of a longer report. For the full analysis and further discussion, please contact Systemiq or ProVeg International

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Thank you to ProVeg International for commissioning this report and acting as a key adviser and partner.

Endnotes

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- ⁱ Lidl UK (2025). Beet-ing expectations: Lidl GB shoots past plant-based target, achieving nearly 700% sales uptake. Corporate press release. Tesco (2026). Plant-based category update.
- ⁱⁱ See n. vi (GFI Europe, 2025). Retail pricing and market analysis.
- ⁱⁱⁱ Euromonitor (2025). Retail sales data, UK packaged food and beverages.
- ^{iv} Euromonitor (2025). Retail sales data, UK packaged food and beverages.
- ^v Euromonitor (2025); ProVeg (2024). Market and consumer research; Systemiq analysis (2026).
- ^{vi} Euromonitor (2025); NielsenIQ (2025); GFI Europe (2025); Systemiq analysis (2026).
- ^{vii} Euromonitor (2025). Retail sales data, UK packaged food and beverages.
- ^{viii} Euromonitor (2025); NielsenIQ (2025); Systemiq analysis (2026).
- ^{ix} Poore, J. & Nemecek, T. (2018); GFI (2024). Good Food Institute - plant-based market data. Systemiq analysis (2026)
- ^x Poore, J. & Nemecek, T. (2018); GFI (2024). Good Food Institute - plant-based market data. Systemiq analysis (2026).
- ^{xi} Abdullah, M.M.H. et al. (2015). Cost-effectiveness analysis. Public Health Nutrition. Systemiq analysis (2026).