Supermarket

2023

The Protein Tracker

National Supermarket Protein Split 2023

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2023 National assessment of animal vs plant proteins sold in supermarkets

The Protein Tracker is a tool developed by the Green Protein Alliance and ProVeg Netherlands for companies wanting to track the volumes of animal vs plant-based proteins in their procurement and sales.

March 2024

Introduction

The Dutch government has set a target for the shift towards more plant-based proteins in our diets: by 2030, the proteins in the average Dutch diet should be of 50% plant vs 50% animal origin. This switch to a more plant-based way of eating is a crucial part of lowering our environmental impact and improving our dietary health.

The majority of food consumed in the Netherlands is bought from supermarkets. Retailers appreciate the big part they have in the shift towards more plant-based diets and are increasingly setting their own targets, often more ambitious than those set by the national government.

In order to know where supermarkets stand and how they can effectively progress towards their target, a standardised monitoring tool is indispensable. To fill this gap in the market, the Green Protein Alliance and ProVeg Netherlands developed The Protein Tracker, using input from representatives of Dutch supermarkets and experts at Questionmark and Natuur&Milieu.

The Protein Tracker methodology is a standardised measurement tool that helps retailers track the volumes of animal vs plant-based proteins in all products sold for human consumption. Not only is it a measurement tool, it also provides supermarkets with suggestions for interventions to push plant-based protein sales for each food category.

The assessment of the protein split in supermarket sales was commissioned by the Dutch Ministry for Agriculture, Nature and Food Quality. This first nation-wide assessment shows us where we stand and provides us with insight on what actions retailers need to take if we are to achieve the necessary dietary shift.

In this publication, the Green Protein Alliance and ProVeg Netherlands present the first national assessment of the protein split in supermarket sales from 2023.

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On commission of the Dutch Ministry for Agriculture, Nature and Food Quality.

1. The Methodology

The Protein Tracker methodology consists of 4 steps. The first is to link each individual product or product category to a 'Protein Tracker group'. The next step is to calculate the volume of product (in kgs) sold within a given calendar year. This is then multiplied by the protein content to compute the total volume of protein sold. Finally, the total protein split can be deduced based on the volume of proteins from all four Protein Tracker groups.

Figure 1 provides a brief explanation of these steps. For a full breakdown of the methodology, please refer to The Protein Tracker methodology.

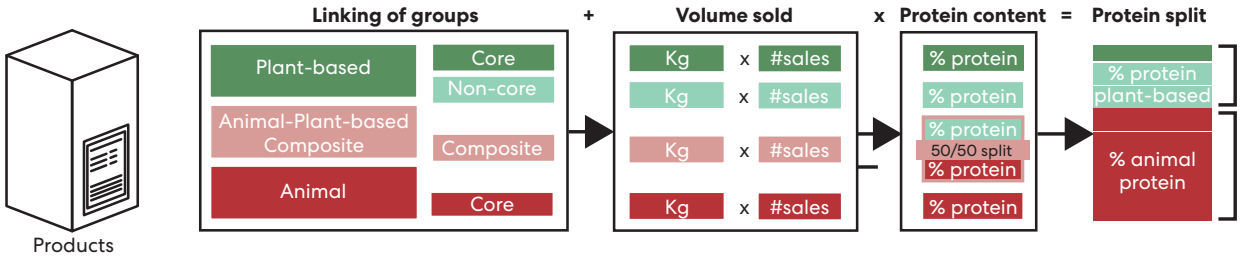

Figure 1 - The Protein Tracker methodology

The Protein Tracker Methodology

The objective of this methodology is to assess the ratios of animal vs plant-based proteins in sales. As data on the distribution of these proteins provide valuable insights, we categorise all products into four Protein Tracker groups. These groups are 'plant-based core', 'plant-based non-core', 'animal - plant-based composite' and 'animal core'. Figure 3 shows a breakdown of the different groups. All proteins in the groups 'plant-based core' and 'plant-based non-core' as well as 50% of the proteins in 'animal-plant-based composite' count towards the overall ratio of plant-based protein. All 'animal core' and 50% of 'animal-plant-based composite' proteins count towards the overall volume of animal protein[1].

A large share of the data for these calculations can be taken from supermarket databases. Wherever this is not possible, you may take the required data from the NEVO Online database[2] or other relevant sources. However, our 2022 pilot and this first national assessment showed that supermarkets have taken large strides last year in improving data availability.

Even if we don't have data available for each product, the Protein Tracker is the best standardised methodology with which to determine plant vs animal proteins in sales to date. Data on products that are well represented in the monitor, because of their high sales numbers and/or high protein content, are available for all supermarkets. The methodology also serves to encourage retailers to improve the availability and accuracy of their data.

1 - The proteins from the group 'animal-plant-based composite' are split 50/50. This means that 50% of the proteins count towards the plant-based share of the ratio and the remaining 50% count towards the animal ratio. For most of these composite products, we have information on the total protein percentage, but not the protein composition (what % plant vs what % animal protein). If data on composition are lacking, the products are split 50/50 in this methodology. If data about the exact protein buildup are available, or if it can be otherwise deduced, we use the actual protein split rather than the 50/50 default.
2 - NEVO Tabel Online is the Dutch Food Composition Table, compiled by the Dutch National Institute for Public Healh and Environnment

In the summer of 2022, most large Dutch supermarkets took a first step by participating in our pilot assessment. The first national assessment we will go into in the following pages has shown that supermarkets have taken big strides in improving the quality of their data. All chains are able to make calculations based entirely or at least partly on product-level data. In chapter 4, you will find a breakdown of the data & protein goals for all participating supermarkets.

2. National protein split

Results
This national protein split combines the ratios of animal vs plant-based proteins sold by Dutch supermarkets ALDI, Dirk, Ekoplaza, Jumbo, Lidl and Plus in 2023. Key industry player Albert Heijn was involved in the creation of the methodology but is not currently using it for its protein assessments.

The six participant chains have each made their own calculations, which were then validated by the Green Protein Alliance and ProVeg Netherlands. The validation of the data includes a rerun of the methodology and an analysis on both product and category level. Based on the validated data, we've calculated the average measured across Dutch supermarkets. Supermarkets with higher sales also contribute a larger share towards the final outcome.

National balance
In 2023, the total balance of proteins sold across Dutch supermarkets was 39.7% plant proteins compared to 60.3% animal proteins[3].

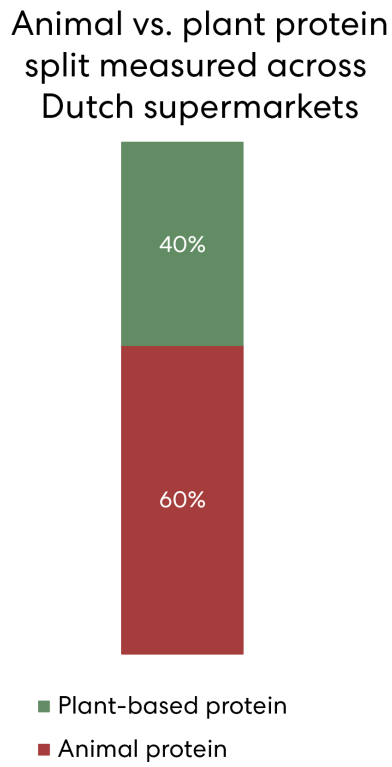

Figure 2 - Protein split measured across Dutch supermarkets in 2023

3 - In line with communication from the national government and supermarkets regarding the protein split and goals, the percentages in the chart have been rounded off.

National balance per group
In addition to the share of animal vs plant-based proteins in sales, supermarkets have looked into the distribution of the proteins sold across the four Protein Tracker groups (see figure 3).

The analysis[4] showed that of all plant-based proteins sold, the majority is in 'plant-based non-core'. Only 5% of all proteins sold are in the 'plant-based core' group. The 'animal - plant-based composite' group accounts for 14% of the total protein volume. Many products in Dutch supermarkets classify as 'composite', but their protein content tends to be relatively low. The animal protein sales in the total balance are mainly from products in the group 'animal core'.

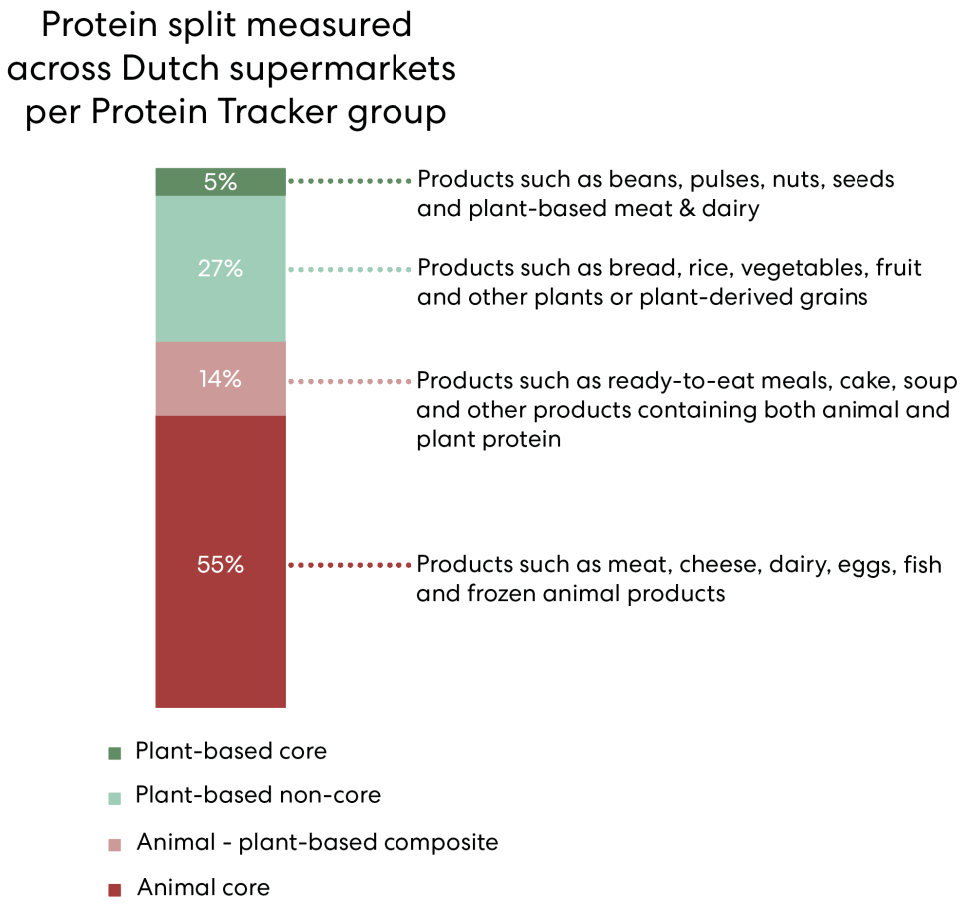

Figure 3 - Protein split measured across Dutch supermarkets in 2023 per group

4 - The percentages in this graph have been rounded up in line with communication standards set by the national government and supermarkets, meaning the total of percentages combined surpasses 100%. The exact ratios are 4.8% (plant-based core), 26.8% (plant-based non-core), 13.7% (composite) and 54.7% (animal core).

3. A national task

This first assessment clearly shows the challenge supermarkets and the Dutch government are facing. In order to attain a 20% more plant-based way of eating, we need both a drastic reduction of animal protein intake and an increase in plant protein sales (especially in the group 'plant-based core'). In addition, there is ample opportunity to 'plantify' product ranges by replacing animal protein with plant-based alternatives in product formulations.

The breakdown into the different Protein Tracker groups shows that only 5% of protein bought from Dutch supermarkets is from foods such as beans, nuts and plant-based meat and dairy alternatives. This is meagre compared to the volume of animal protein sold through products such as meat, dairy, cheese and eggs.

In 2023, most Dutch supermarket chains embraced the Protein Tracker methodology and tightened their goals accordingly. In the next few years, Green Protein Alliance and ProVeg Netherlands will continue to work together with supermarkets to improve the methodology and monitor the protein split on the move towards their 2030 targets.

4. Breakdown per retailer chain

We created The Protein Tracker with input from several different retail chains. Since 2022, most supermarkets have been publishing their own protein reports. In this chapter, we briefly explain how each chain has used the Protein Tracker methodology and go into their specific targets and results.

ALDI
ALDI made its Protein Tracker calculations based on product-level data. Whenever the protein content of a product was not listed in their own database, data was obtained from the NEVO Online dataset or other sources.

ALDI's target for 2030 is a ratio of 60% plant vs 40% animal protein. They have set an intermediate 50/50 goal for 2025.

"ALDI is using multiple strategies to make the shift to a more plant-based diet possible. The Protein Tracker has given us an understanding of which interventions are most effective in achieving our goals."
– Gideon van Bussel, Managing Director Procurement ALDI

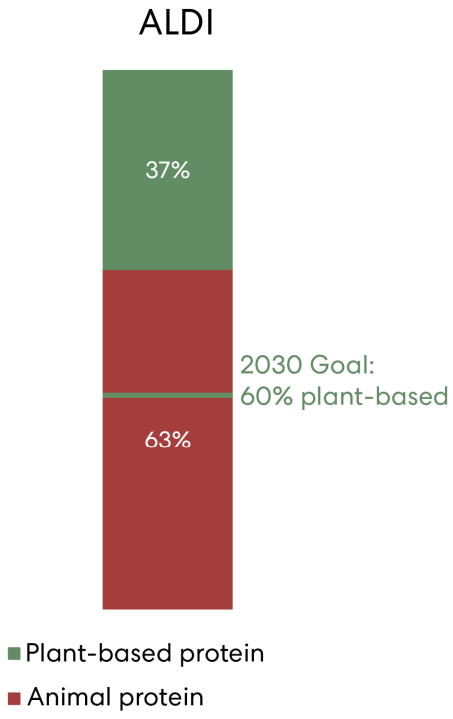

Figure 4 - ALDI protein split

Dirk
Dirk made their Protein Tracker calculations based on product-level data. Whenever the protein content of a product was not listed in their own database, data were obtained from the NEVO Online dataset or other sources.

Dirk has set a target of 60% plant vs 40% animal protein in 2030, with an intermediate 50/50 goal for 2025.

"The Protein Tracker provides us with insight into the protein split in our range, helping us implement focused interventions to achieve our target."
– Robin Methorst, Sustainability Manager Dirk

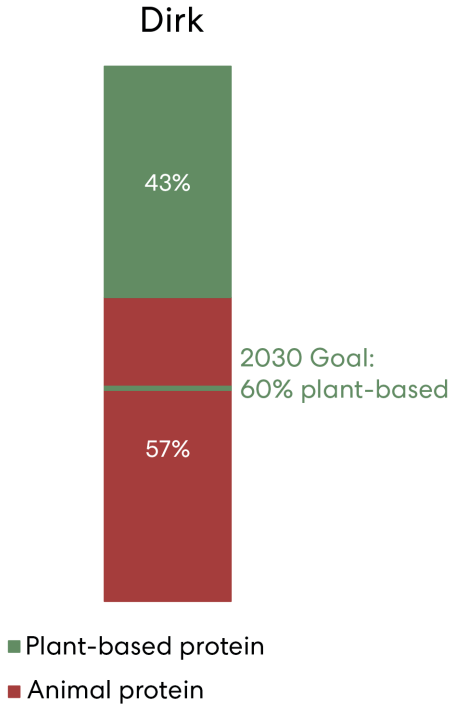

Figure 5 - Dirk protein split

Ekoplaza
Ekoplaza carried out its Protein Tracker calculations largely based on product-level data. Wherever data on a specific product were unavailable, Ekoplaza used category-level data.

Ekoplaza has set a target of 60% plant vs 40% animal protein by 2030, with an intermediate goal of 50/50 in 2025.

"We are proud that Ekoplaza is the first Dutch retailer to have already achieved the national 50% target. In the coming years, we will keep doing what needs to be done to make a difference in this protein shift."
- Ekoplaza

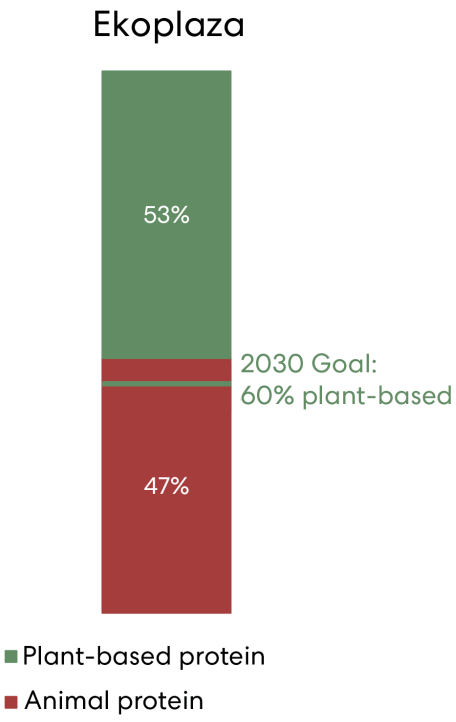

Figure 6 - Ekoplaza protein split

Jumbo
Jumbo has carried out its calculations based on a combination of product- and category-level data. For products in the composite group, Jumbo has been able to a do in depth calculation. Whenever data was not available, Jumbo made use of the NEVO Online dataset. The total calculation contains data grom supermarkets in both the Netherlands and Belgium.

Jumbo has set a target of 60% plant-based vs 40% animal protein for 2030, with an intermediate 50/50 goal by 2025.

"At Jumbo, we are making an effort to help our customers eat a healthy and sustainable diet. We're nudging them towards a more plant-based way of eating by things like banning meat promotions, lowering prices on vegan meats and in-store inspiration."
-Marianne de Schutter,
CSR Manager Jumbo

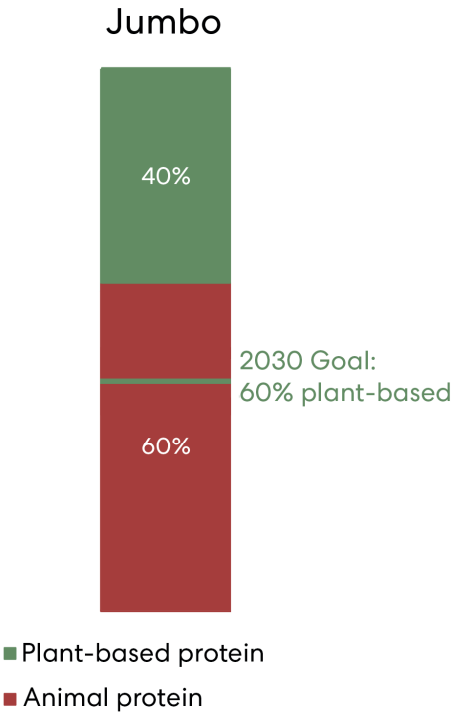

Figure 7 - Jumbo protein split

Lidl

Lidl carried out its calculations using mostly product-level data. Whenever product data were unavailable, Lidl referred to category-level data. Whenever a product's protein content was not listed in the Lidl database, data were obtained from the NEVO Online dataset or other sources. In its monitoring, Lidl did not include changing promotional assortiment.

Lidl has set a goal of 60% plant vs 40% animal protein in sales by 2030, with an intermediate goal of 50/50 by 2025.

"The shift to alternative proteins has our full attention and our efforts are paying off. In 2023, Lidl saw more plant-based protein sales than in the year before. We will keep working hard to achieve our goal of 60% plant-based sales!"

- Quirine de Weerd,
Senior Manager CSR & Relations Lidl

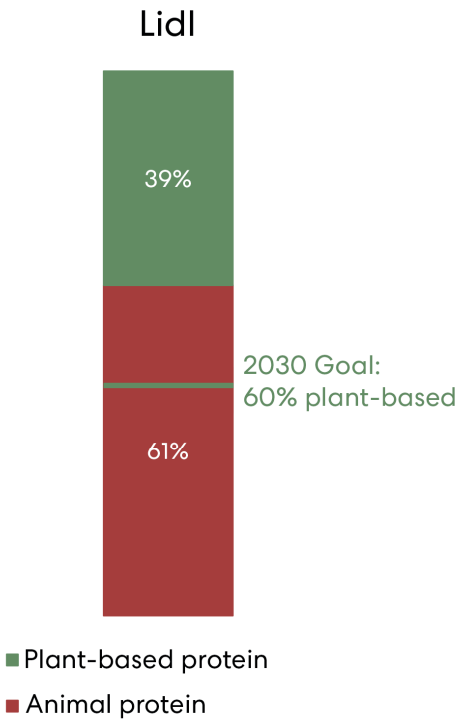

Figure 8 - Lidl protein split

PLUS

PLUS has made their Protein Tracker calculations using product-level data. Wherever the protein content of a product wasn't listed in their own database, data were obtained from the NEVO dataset or other sources.

PLUS has set a target of 60% plant-based vs 40% animal protein by 2030, with an intermediate goal of 50/50 by 2025.

"At PLUS, we want to do our part in the shift towards sustainable proteins and feel the urgency to do more. That's why we've decided to sharpen our target for 2023."

- PLUS Retail

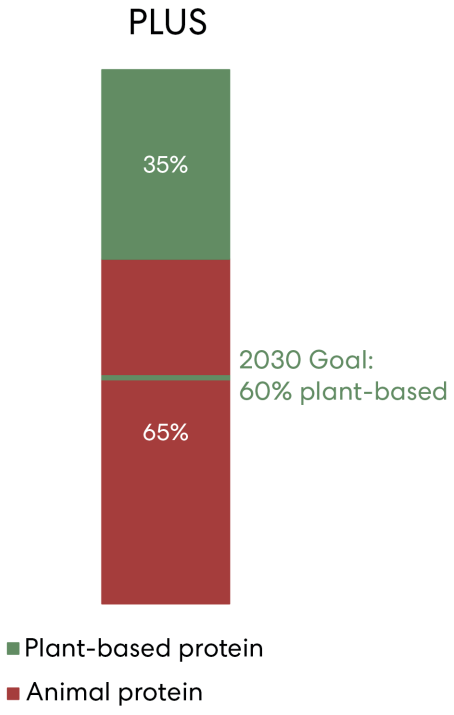

Figure 9 - PLUS protein split

Albert Heijn
Albert Heijn aims to achieve a 60% plant vs 40% animal protein split by 2030, with an intermediate 50/50 goal by 2025.

In order to achieve this goal, Albert Heijn has been using its own assessment tool which is similar, but not equivalent, to the Protein Tracker methodology. For this reason, we have agreed to not use Albert Heijn's protein data in this first assessment.

Albert Heijn has been actively involved in the development of the Protein Tracker methodology and the company plans to join in on.

"Albert Heijn is set on its goals to make a positive contribution to the alternative protein shift. This will also help us to reach our objective of slashing our scope 3 CO2-emissions by 45% by 2030."

- Albert Heijn

Acknowledgements
This publication is the result of a successful collaboration between NGOs and Dutch supermarkets. We want to thank all participating retail chains for their efforts in the collaborative creation and implementation of our methodology. We also thank the experts at Questionmark and Natuur&Milieu for their expertise and input. Lastly, we thank the Dutch Ministry of Agriculture, Nature and Food Quality for funding this project.