

Supermarket

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**The Protein
Tracker
National Supermarket
Protein Split
2025**

The Protein Tracker

National assessment of plant-based versus animal proteins sold in supermarkets in 2025

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 (foodservice) and sales (retail).

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THE PROTEIN TRACKER

THE SHIFT TO PLANT-BASED PROTEINS IN DUTCH SUPERMARKETS

Introduction

Dutch supermarkets are Europe's frontrunners when it comes to the shift to alternative proteins: nearly the entire sector has openly committed to ambitious goals for more plant-based proteins in our diets by 2030. In their efforts to rebalance the protein split in favour of more plant-based than animal protein, supermarkets are paving the way for a healthier and more sustainable way of eating.

These industry wide ambitions call for a unified measurement system. To this end, the Protein Tracker methodology was developed, in close collaboration with Dutch supermarkets, the Green Protein Alliance, ProVeg Netherlands, Questionmark Foundation and Natuur & Milieu. This is a standardised measurement tool that helps retailers establish the exact split between animal and plant protein in their sales. The Protein Tracker is an important indicator of progress towards 2025 and 2030 protein goals. It is also the standard tool used by the Dutch Ministry of Agriculture, Fisheries, Food Security and Nature in its sustainability dashboard¹.

This is the 3rd consecutive annual assessment by Green Protein Alliance and ProVeg Netherlands of the national protein split in Dutch supermarkets. This publication compiles the aggregated data over the year 2025 from the following supermarket chains:

Albert Heijn, Aldi, Crisp, Dekamarkt, Dirk, Ekoplaza, Hoogvliet, Jumbo, Lidl, Nettorama, Odin, Picnic and PLUS.

Besides industry-level results, this report also presents the individual protein splits per supermarket chain. Comparing the figures for 2025 with the data for 2023 and 2024 provides a picture of the long-term development of the protein shift in Dutch retail.

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¹ - <https://dashboardduurzaamheid.nl/>

1. The Protein Tracker Methodology

The purpose of the Protein Tracker Methodology is to gain insight into the ratio between animal and plant-based proteins sold over one calendar year. Its scope covers all products suitable for human consumption sold in both physical and online stores. The total volume of protein is established by multiplying the total volume (in kgs) of product sold by its protein content (in %).

The methodology categorises all food products into four Protein Tracker groups. This classification allows the user to establish the total protein ratio in their sales, as well as which products and product categories make the biggest contributions to the overall volume of protein sold.

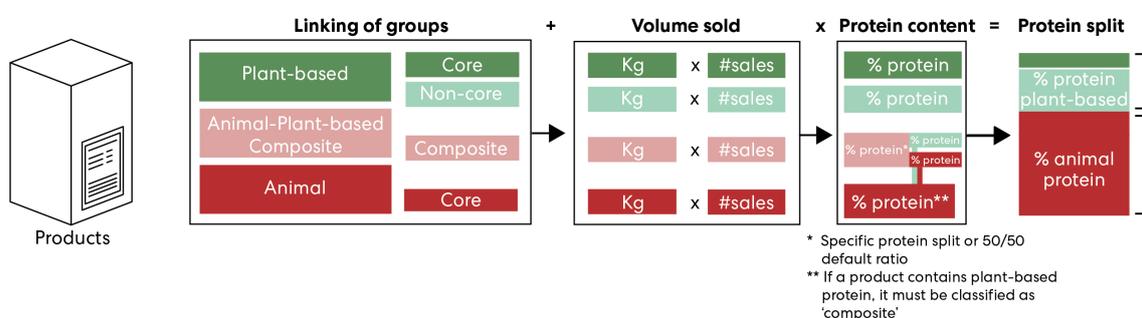


Figure 1 - Overview steps The Protein Tracker methodology

The Protein Tracker methodology uses the following 4 groups:

- **Plant-based core:** Products containing exclusively plant-based protein and make a large contribution to the protein shift. These include beans, nuts, seeds and plant-based meat, dairy and egg replacements.
- **Plant-based non-core:** Products containing exclusively plant-based protein but are not a primary protein source, such as bread, rice, vegetables and fruits.
- **Animal-plant-based composite:** Products containing both animal and plant-based proteins. These are composite products such as ready-made meals, pastries and animal products enriched with plant-based proteins (e.g. hybrid dairy).
- **Animal core:** Products containing exclusively or mainly animal sourced proteins, such as meat, fish, dairy, cheese and eggs.

The steps to the methodology are laid out below in Figure 1. For the full methodology, please see theproteintracker.com².

Methodology update (October 2025)

In October 2025, the Protein Tracker methodology was updated to better reflect the current market developments and the increased availability of product data. The core of the Methodology remains unchanged. This update introduces two levels of data accuracy to the Protein Tracker methodology: level A and level B.

- **Level A** is used when a retailer has data on the exact ratio of animal vs plant proteins in individual products. In this case the protein content is split into two categories and this exact ratio of plant vs animal protein is used in the assessment. For instance: A sausage roll containing 7.2 grams of protein (of which 6 g animal and 1.2 g plant protein) is assessed according to its actual animal & plant protein content. Since A level data assessments use the actual ratios of protein in their calculations, this is the most accurate level of assessment.
- **Level B** is used when data on the exact ratio of plant and animal protein in composite products is unavailable. Level B assessment uses the total protein content for its calculations. For composite products, this means using a 50/50 default ratio, which assumes 50% of a product's protein is plant-based and 50% is animal-sourced.

It is important to note that data levels A and B may be used in combination in the Protein Tracker assessment. This allows supermarkets to work with what data they have and grow towards increased accuracy in their assessments as their data quality improves. Chapter 5 elaborates on which level of data accuracy (A, B or a combination of both) each supermarket used for the assessment of their protein split.

2. The 2025 Protein Split

Participating retailers

This 2025 assessment combines the ratios of animal vs plant-based proteins sold by supermarket chains ALDI, Albert Heijn, Crisp, Dekamarkt, Dirk, Ekoplaza, Hoogvliet, Jumbo, Lidl, Nettorama, Odin, Picnic and Plus. This is the first year that Albert Heijn, Hoogvliet and Odin are included in the national assessment.

Data optimisation

The update to the methodology has meant that several supermarket chains are now able to track their plant-based progress more accurately. Ever more products from the animal-plant-based composite group are assessed according to their actual protein content, not the default 50/50 ratio. This means that their exact animal vs plant protein ratio was established and it's clear how these contribute to the overall protein split.

Calculations and validation of data

The participating supermarkets have carried out their own Protein Tracker assessment to establish the total ratio of animal and plant-based proteins in their sales. All products for human consumption sold in the year 2025 were included in the supermarkets' assessments³. Those retailers who (across the span of 2025) improved the quality of their data have redone their assessments of previous years for more accurate comparison. Those supermarkets who took part for the first time in 2025 were allowed to also provide protein data for the years 2023 and 2024. Albert Heijn and Odin have provided additional data for 2024. Hoogvliet has provided data for 2023 and 2024.

All data provided by the supermarkets are validated by the Green Protein Alliance and ProVeg Netherlands. Previously, this validation involved a survey and a representative sampling of data to check for consistency in the application of the methodology. For first-time participants, this validation constituted a qualitative test of the methodology, a verification of source data and a representative sample test. It's a step forward that so many Dutch supermarkets are now tracking their protein, creating transparency on the overall state of the protein shift in the Netherlands.

3 - Where it was not possible for a retailer to calculate a protein split for the whole assortment, a disclaimer was placed next to the provided data.

3. National Protein Split

Results

The national average protein split over the year 2025 was established using validated data from all supermarkets participating in this Protein Tracker assessment. The data is aggregated, meaning supermarkets with larger sales volumes also contribute a larger share towards the total average. This assessment encompasses around 95% of the total market share of Dutch supermarkets.⁴

National Protein Split

The total protein split of all participating supermarkets in the year 2025 sits at 42.6% plant vs 57.4% animal protein, compared with 42.7% plant vs 57.3% animal protein in 2024 and 42.0% plant vs 58.0% animal protein in 2023.⁵

Protein split of retailers for the years 2023, 2024 and 2025

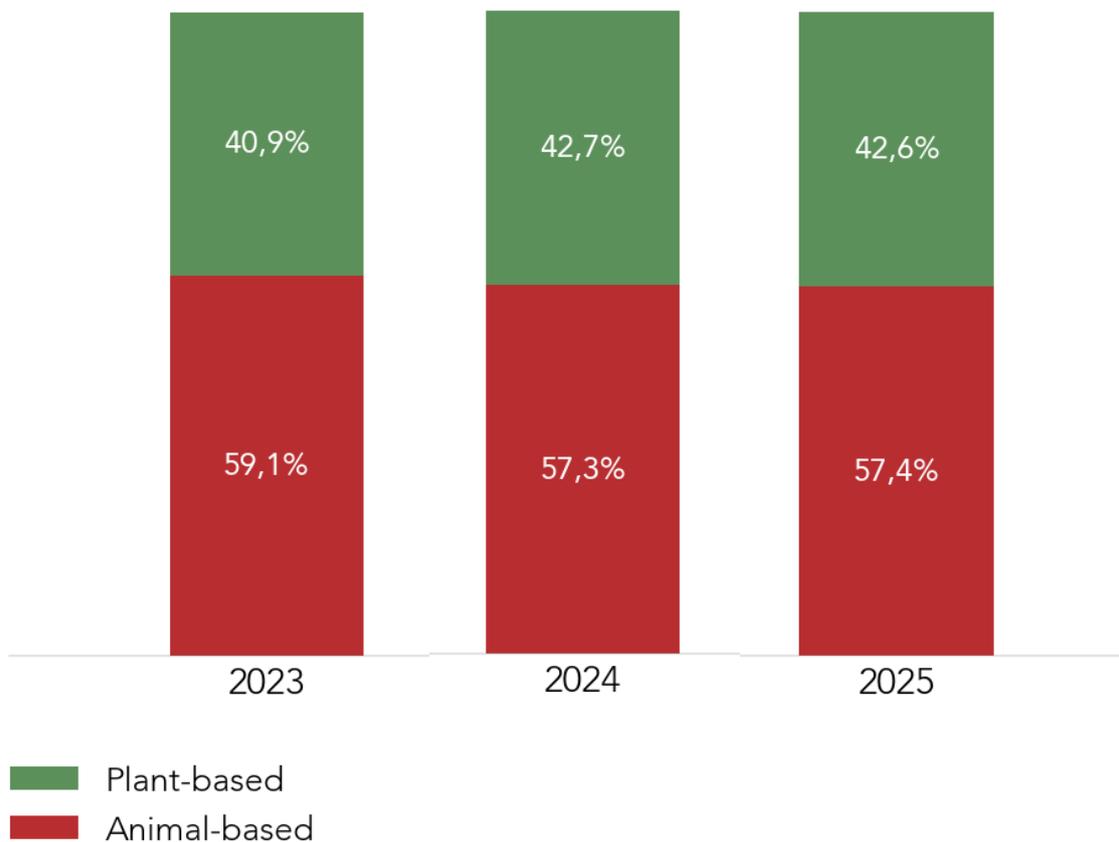


Figure 2 - National protein split 2023, 2024 and 2025

4 - www.distrifood.nl/195430/marktaandeelen-aldi-groeit-hard-ah-klimt-en-jumbo-zakt-onder-20

5 - For the aggregated data of 2024 and 2025 all participating retailers are included. The 2023 data excludes Albert Heijn, Odin and Nettorama.

National Average per Protein Tracker Group

An assessment of the split of total protein volume across the four Protein Tracker groups sheds light on what has changed over the past year. The results show that the sales volume of 'plant-based core' products has decreased by 0.6%. At the same time, there is a 1.1% increase in the share of 'plant-based non-core' products. There is a reduction in sales of 'animal core' products, as well as an increase of 'animal-plant-based composite' products. This last shift can be partially explained by increased accuracy in supermarket databases and likely also has to do with the introduction of hybrid products (such as hybrid meat and dairy).

Some of the animal products in supermarkets naturally contain both animal and plant-based proteins (e.g. frankfurters, meaty spreads). Once a supermarket has data on the exact split between animal and plant-based protein in products, they are classified as 'animal-plant-based composite' instead of 'animal core'. This is how small adjustments to product formulations (such as substitution of 10% of its animal protein content) are incorporated into the total split.

Products whose animal protein content was lowered without substituting the loss with a plant-based alternative protein will remain in 'animal core'. If sold in large quantities, they can cause a reduction in animal protein sales.

Retailer protein split between Protein Tracker groups for 2023, 2024 and 2025

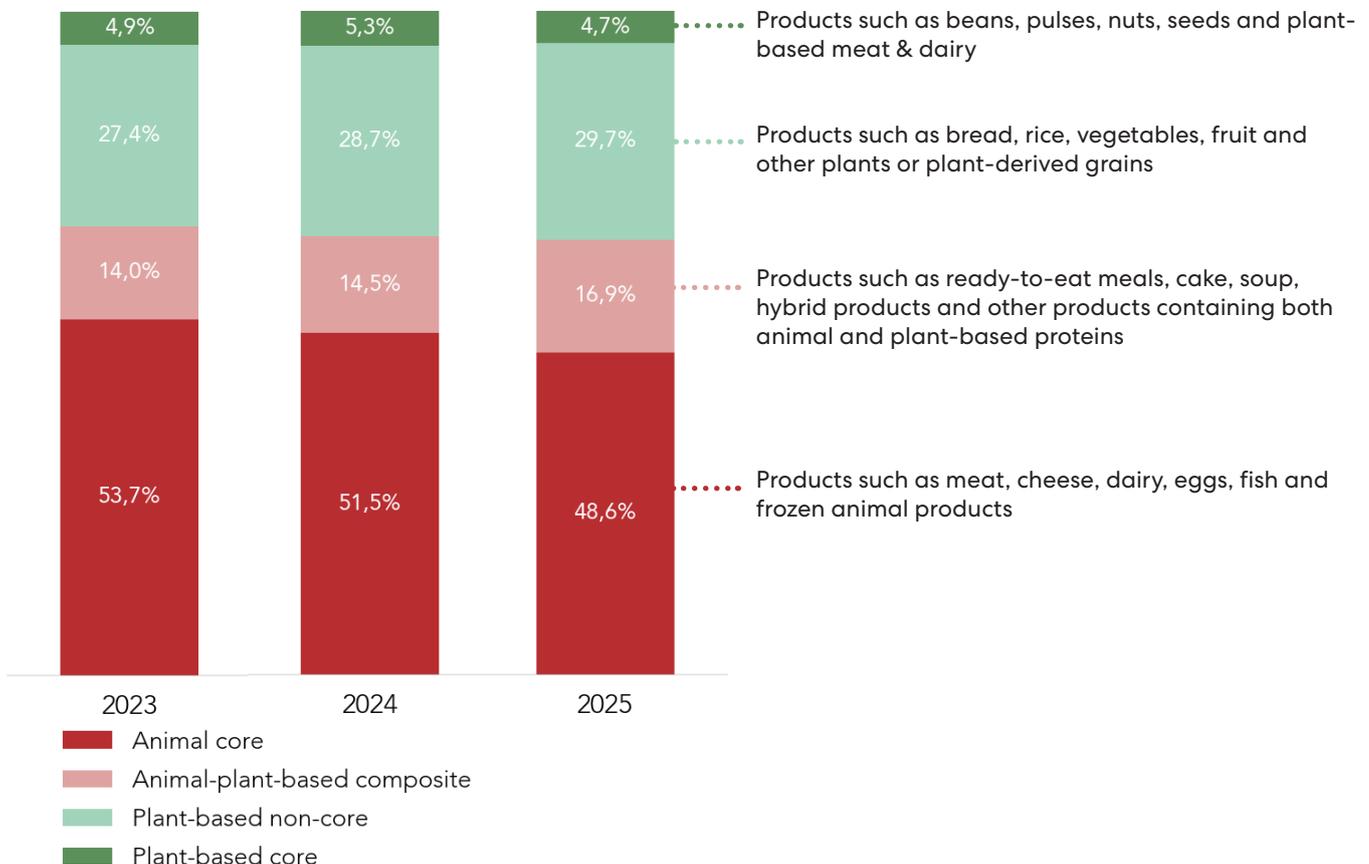


Figure 3 - National protein split per Protein Tracker group for 2023, 2024 and 2025

4. The road to 60/40

The results from this 3rd national Protein Tracker assessment show that supermarkets have not managed to move the 'protein transition' forward to be on track with the goal of 60% plant-based protein by 2030. After some initial growth, the share of plant-based proteins has now slightly dropped compared to 2024.

Voortgang en doel landelijke supermarkt eiwitverhouding

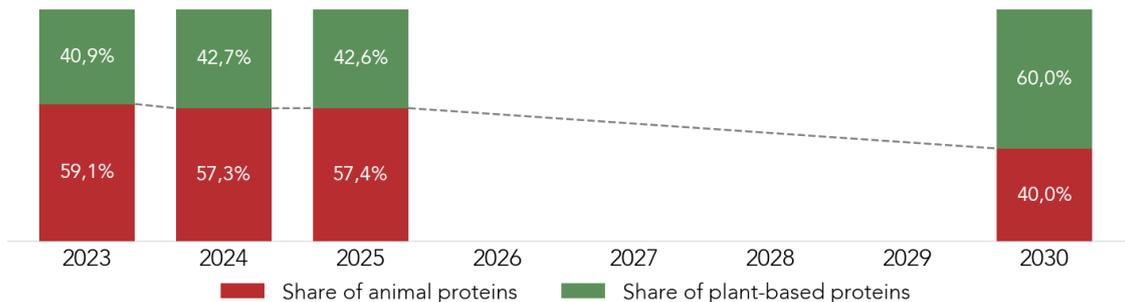


Figure 4 - Protein splits and target 2030

Dutch supermarkets are in the lead internationally when it comes to ambitions and transparency in the plant-based shift. The Netherlands is the only country in the world whose entire supermarket sector has formulated plant-based goals that they report on annually. In order to maintain this leadership position, it's essential that these ambitions translate to tangible results in the near future.

The assessment also shows that the goal of an average of 50% plant-based protein by 2025 has not been achieved yet. Compared with previous years, 2025 has seen relatively few large-scale interventions from supermarkets to encourage consumers to choose plant-based foods over animal products.

The most significant development of 2025 was the introduction of animal products enriched with plant-based proteins. The sales volume of these products as yet is not significant enough in comparison with the large volumes of animal products sold to really contribute to the plant-based shift. At the same time, these products fit into a larger development where animal products are gradually supplemented with plant-based components. This development holds great potential for the shift towards more plant-rich diets.

In the past several years, supermarkets have taken individual actions to advance the protein shift. However, the options for individual front-runners to take further steps without losing market share are limited. A more collective approach is therefore needed to move the protein transition to the next level. Industry-wide agreements and cooperation can ensure a level playing field and facilitate interventions that would be difficult for individual parties to implement on their own.

5. Breakdown per supermarket chain

The Protein Tracker was developed in collaboration with various supermarket chains. Since 2022 most supermarkets have been publishing their own protein reports each year. This elaborates on each supermarket's targets and results: which level of data accuracy was used in the assessment, the exact protein split and targets for the next few years.

Albert Heijn

Albert Heijn used level B data accuracy in their analysis. For products in the animal-plant-based composite group they have used the 50% plant protein /50% animal protein default assumption. This assessment included 77% of their total volume sold in 2025. In the calculation of 2026 100% of the volume sold will be included.

Albert Heijn has set a goal of 60% plant vs 40% animal protein in sales by 2030, with an intermediate goal of 50/50 by the end of 2025. This intermediate goal has not been met.

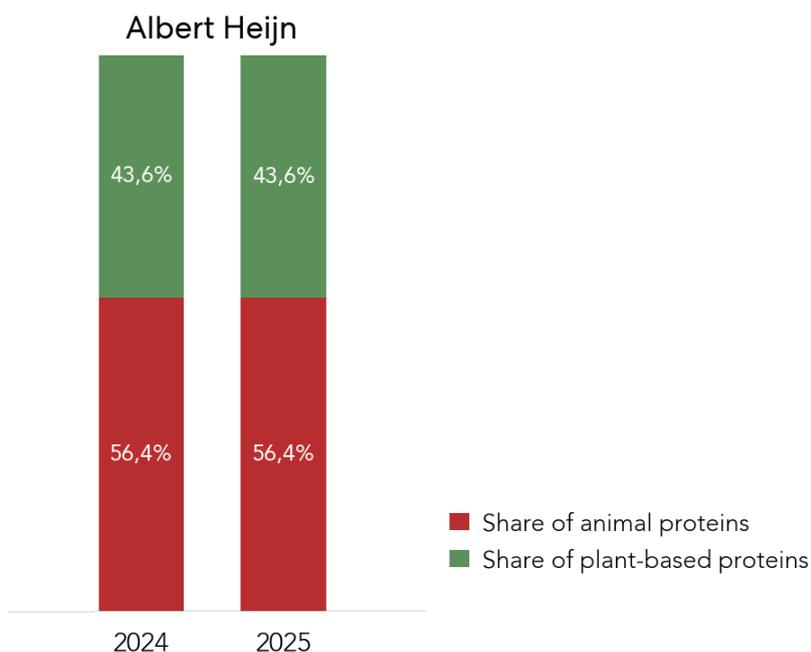


Figure 5 - Protein split Albert Heijn

“Albert Heijn is working on the shift from animal to sustainable plant-based proteins. Compared to diets high in animal protein, plant-rich diets reduce CO2 emissions, save land and water and contribute to biodiversity and overall health. We are working on this shift, also known as the protein transition, through the introduction of more plant-based and hybrid products and we actively encourage our customers to choose plant-based.”

— Martijn Versteegh, Program Director Sustainability

Aldi

Aldi has carried out their Protein Tracker assessment using level A and level B data accuracy combined. 90% of their total protein data have level A accuracy. For 10% of their protein volume, only the total protein content is known. This means that for all products from the animal-plant-based composite group, Aldi used the 50/50 default ratio (level B).

Aldi's target for 2030 is a ratio of 60% plant vs 40% animal protein, with an intermediate 50/50 goal for 2025. This intermediate goal has not been met.

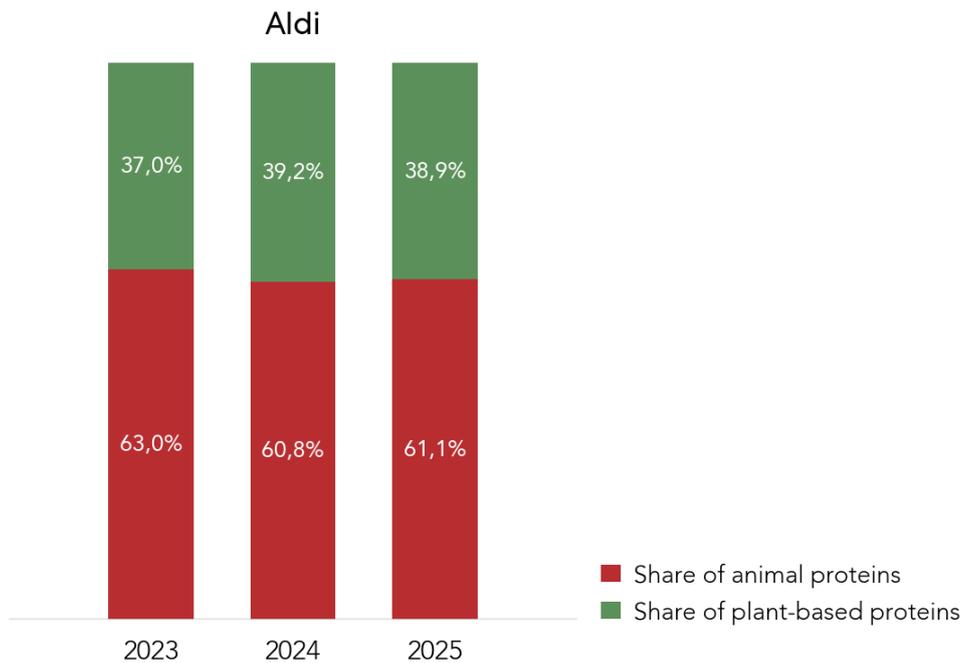


Figure 6 - Protein split Aldi

“Aldi uses multiple strategies to make the shift to a more plant-based diet possible. In our special offers leaflet, for instance, you will find one vegetarian meat option on the same page with the meat promotions. We regularly add additional plant-based meats to this flyer. ALDI always offers affordable meat and dairy substitutes. The plant-based alternative is always the same price or cheaper than its animal equivalent.”

— Gideon van Bussel, Managing Director Procurement

Crisp

Crisp has carried out its assessment using both level A and level B data accuracy. For 93% of the total protein sold, the exact ratio of animal vs plant protein was known (level A). For 7% of the volume of protein sold, only the total protein content was known. For this 7%, the 50/50 default was used for products from the animal-plant-based composite group (level B).

The Protein Tracker assessments for 2023 and 2024 have not been redone after data optimisation, meaning any differences compared to previous years may be ascribed to data optimisation.

Crisp's goal is to achieve a protein ratio of 60% plant-based protein and 40% animal protein by 2030, with an intermediate 50/50 goal for 2025. This intermediate goal has not been met.

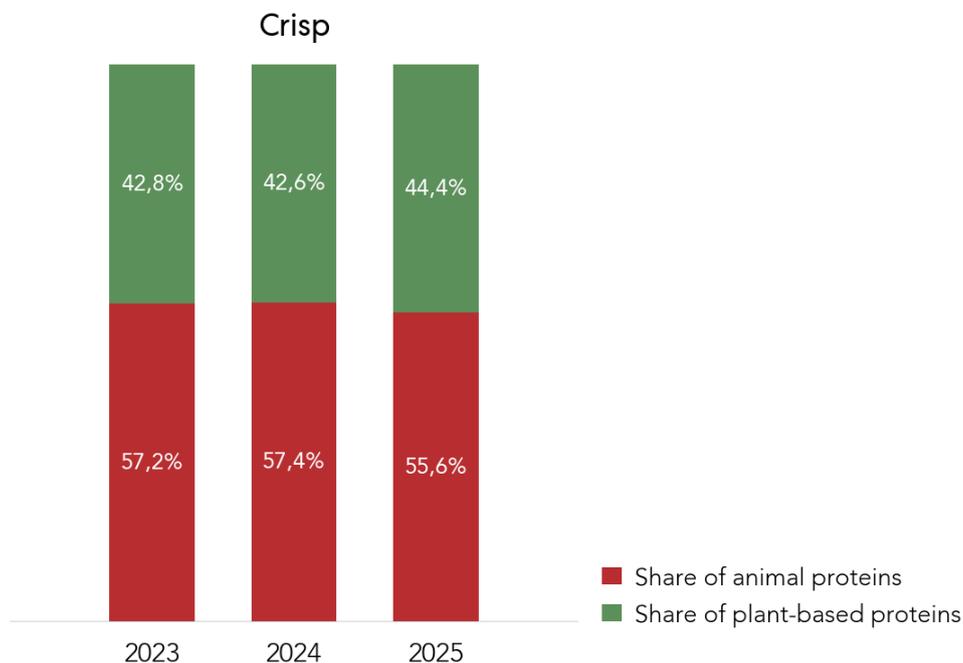


Figure 7 - Protein split Crisp

“With an increase to 44.4% plant-based proteins, we are taking steps forward. Although the transition is progressing more slowly than expected, we also see many opportunities for impact. In our meal box, we already see this reflected, with 59.4% plant-based. We continue to commit to the green transition by showing that more plant-based food goes perfectly together with plenty of flavor on your plate. Together with our local farmers and small-scale producers, we make this accessible through a short supply chain.”

— Michiel Roodenburg, cofounder

DekaMarkt

DekaMarkt carried out their assessment using a combination of level A and level B data accuracy. For 65% of the total protein sold, the exact ratio of animal vs plant protein was known (level A). For 35% of the volume of protein sold, only the total protein content was known. For this 35%, the 50/50 default was used for products from the animal-plant-based composite group (level B).

The Protein Tracker assessments for 2023 and 2024 have not been redone after data optimisation, meaning any differences compared to previous years may be ascribed to data optimisation.

DekaMarkt's goal is to achieve a 50% plant vs 50% animal protein split in sales by 2030.

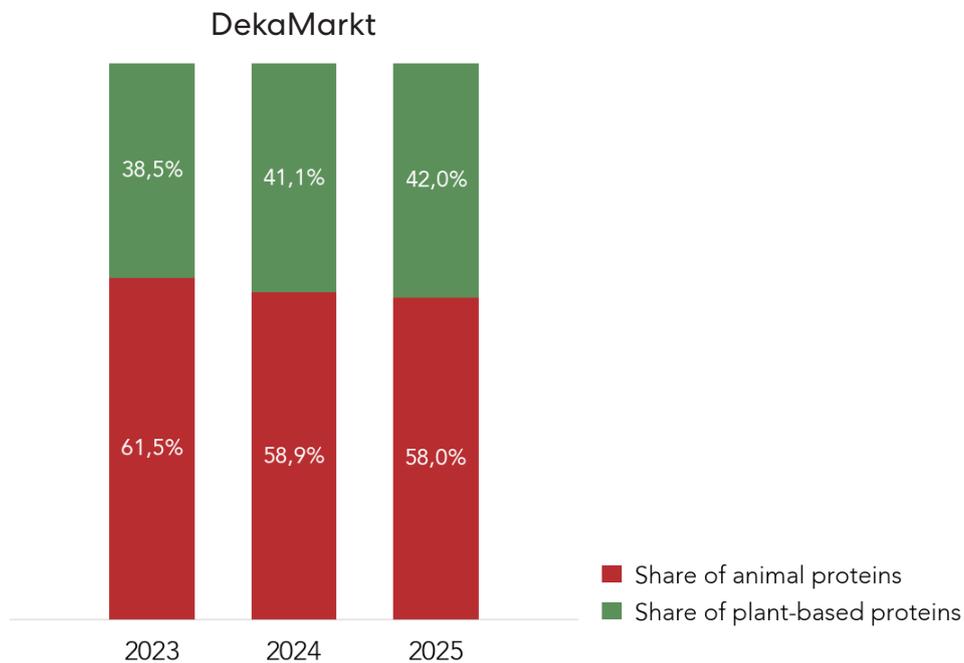


Figure 8 - Protein Split DekaMarkt

“DekaMarkt onderschrijft het belang van de eiwittransitie als essentieel onderdeel van de klimaattransitie en voor het bevorderen van een duurzaam en gezond eetpatroon. DekaMarkt gaat door met inspireren, het bieden van een breed productaanbod en passende acties om haar doelen voor 2030 te behalen.”

— DekaMarkt

Dirk

Dirk carried out their Protein Tracker assessment using data accuracy level B. For products in the animal-plant-based composite group, a default assumption of 50% plant and 50% animal protein was used.

Dirk has set a goal of 60% plant vs 40% animal protein in sales by 2030, with an intermediate goal of 50/50 by the end of 2025. This intermediate goal has not been met.

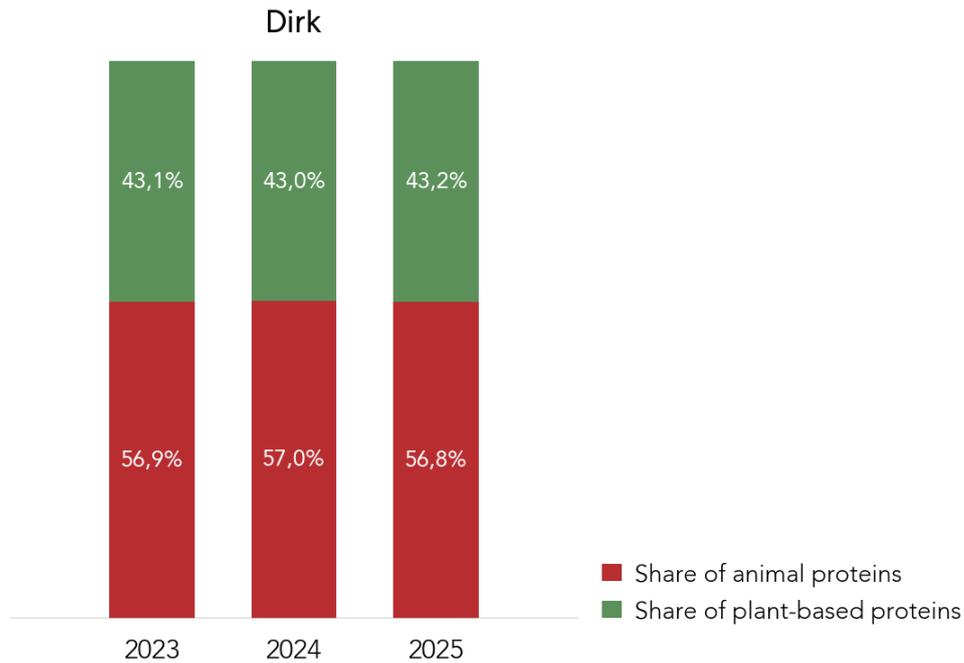


Figure 9 - Protein split Dirk

“The protein transition requires both insight and action. That’s why we are working on improving our data to gain clearer insight into our progress.

At the same time, we continue to actively focus on inspiration and a surprising assortment to encourage customers to choose plant-based options more often.”

— Uwe Saueressig, Manager General Affairs Quality and Sustainability

Ekoplaza

Ekoplaza carried out their Protein Tracker assessment using data accuracy level B. For products in the animal-plant-based composite group, a default assumption of 50% plant and 50% animal protein was used.

Ekoplaza want to achieve a 70% plant-based vs 30% animal protein split by 2030. Their previous 60/40 goal was met in 2024.

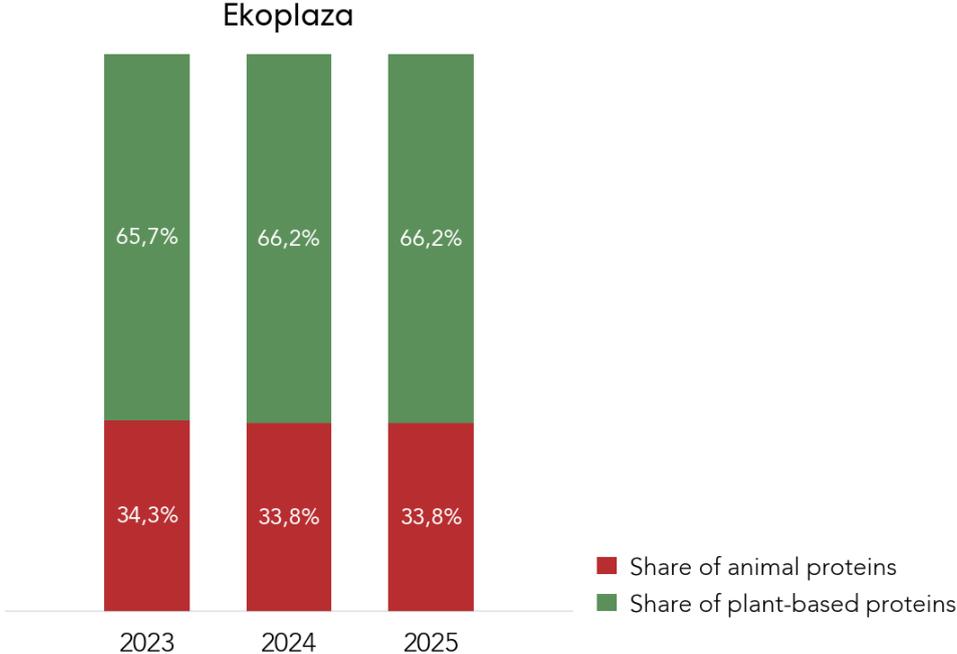


Figure 10 - Protein split Ekoplaza

“At Ekoplaza, we consider the protein transition key to a resilient and future-proof food system. Transparency, quality and flavour are important motivators for people to choose more plant-rich diets.”

— Lorenzo van Nistelrooij, Quality & CSR

Hoogvliet

Hoogvliet carried out their Protein Tracker assessment using data accuracy level B. For products in the animal-plant-based composite group, a default assumption of 50% plant and 50% animal protein was used.

Hoogvliet has set a 50% plant-based vs 50% animal protein goal for 2030.

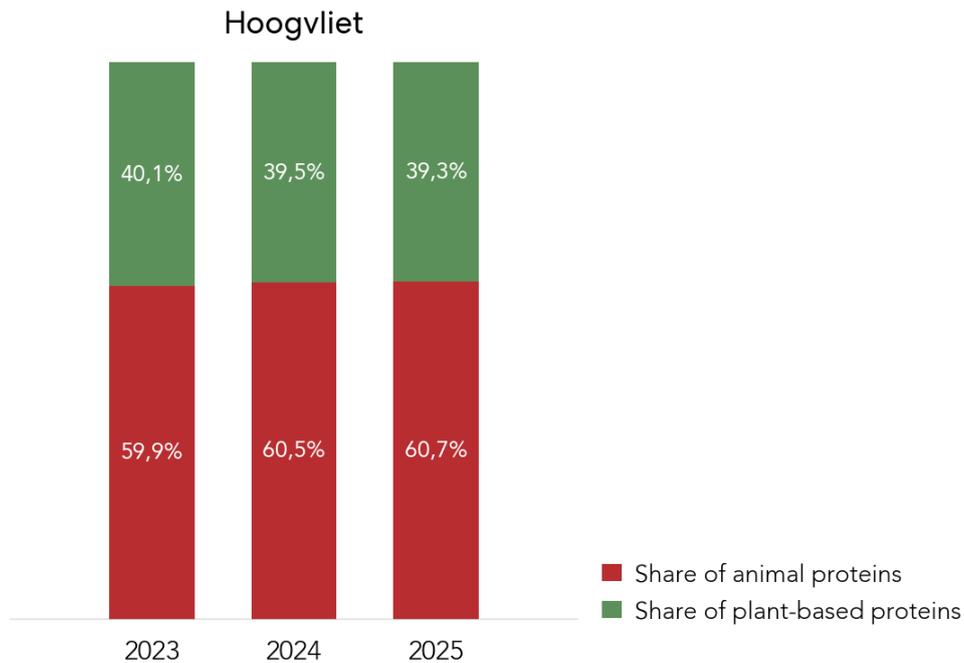


Figure 11 - Protein split Hoogvliet

“Hoogvliet wants to help consumers make more conscious food choices. From both a health and sustainability perspective, the shift to plant-based proteins is a part of that. We’re promoting the shift by offering plant-based and hybrid alternatives to animal products.”

— Hoogvliet Supermarkt

Jumbo

Jumbo carried out their assessment using data accuracy level A. The exact ratio of animal vs plant-based protein in products was used to establish the total protein split.

Jumbo has a target of 60% plant-based vs 40% animal protein for 2030, with an intermediate 50/50 goal by the end of 2025. This intermediate goal has not been met.

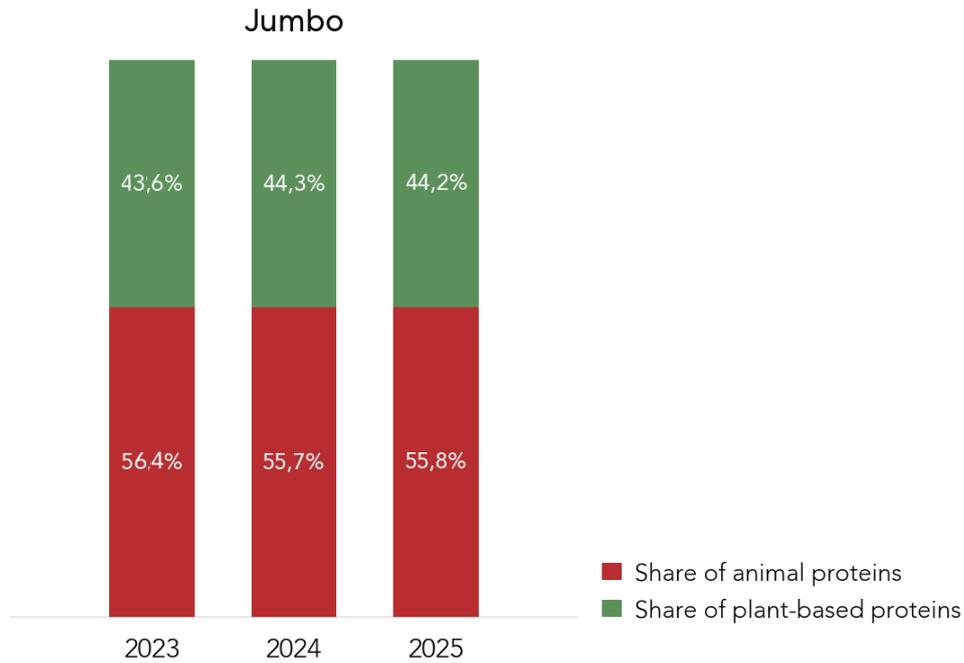


Figure 12 - Protein split Jumbo

“As Jumbo, we continue to commit to a more plant-based diet. We do this through product innovations, consumer activations and campaigns, attractive pricing, and tasty recipes. We will continue to work closely with companies, government, civil society organizations, and educational institutions to encourage consumers to choose plant-based options more often. This requires both time and collaboration.”

— Marjolein Verkerk, Manager CSR and Communications.

Lidl

Lidl carried out their assessment using data accuracy level A. For the data of 2023 and 2024 all of the action assortment was excluded. In the 2025 assessment 33% of the action assortment was included. The 2025 assessment included 94% of their total volume sold in 2025.

Lidl has a target of 60% plant vs 40% animal protein in sales by 2030, with an intermediate goal of 50/50 by 2025. This intermediate goal has not been met.

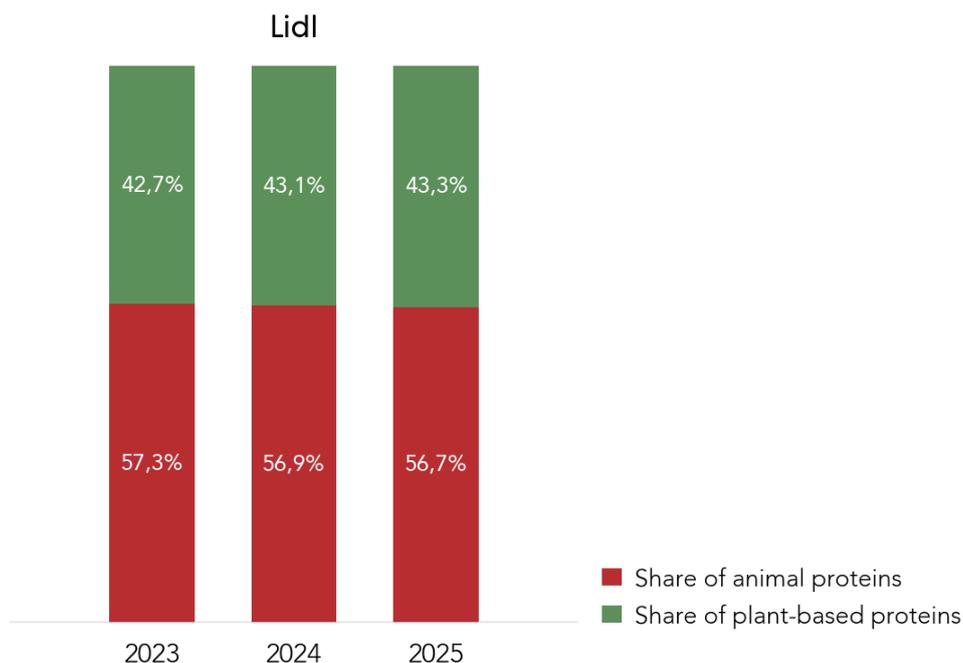


Figure 13 - Protein split Lidl

“By expanding our assortment of legumes and meat alternatives within the Schijf van Vijf—and through the introduction of hybrid products—we are taking important steps in the protein transition. Our price parity policy remains a crucial pillar in this effort.”

Although we are making progress, we need to accelerate to realize our ambitions in this transition. We therefore remain fully committed to making the plant-based choice accessible and affordable for every customer.”

— Srdan Markov, Director of Procurement

Odin

Odin carried out their assessment using data accuracy level B.

For products in the animal-plant-based composite group, the default assumption of 50% plant and 50% animal protein was used.

Odin has a target of 70% plant-based vs 30% animal protein by 2030. Odin's previous 60/40 goal was met in 2024.

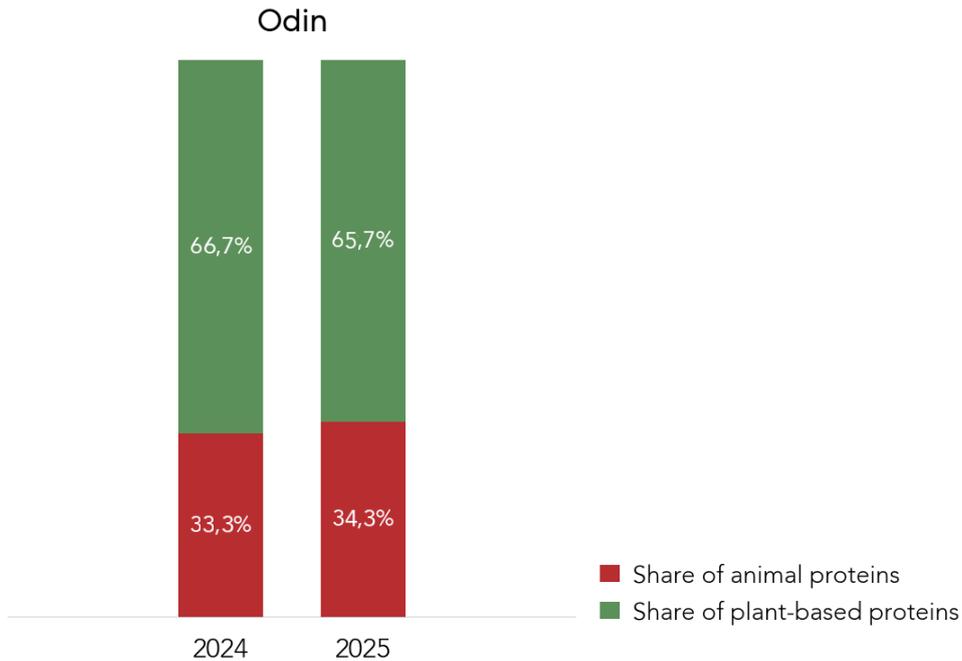


Figure 14 - Protein split Odin

“We believe it is important that our animal proteins come from animals raised according to the highest animal welfare standards. In 2025, we let our farmers tell consumers how they work toward this, for example through good living conditions, keeping animals with their horns or tails intact, using dual-purpose breeds, and ensuring careful slaughter. As a result, more people who consciously choose fair and animal-friendly products were able to find us, which led to growth in this category. For us, it is a great challenge to inspire these new customers with appealing plant-based recipes and products so that this year we can move even further toward plant-based.”

— Wouter Wezenbeek, Directeur Source & Supply

Picnic

Picnic carried out their assessment using data accuracy level B. For products in the animal-plant-based composite group, the default assumption of 50% plant and 50% animal protein was used.

Picnic has set a goal of 60% plant vs 40% animal protein in sales by 2030, with an intermediate goal of 50/50 by 2025. This intermediate goal has not been met.

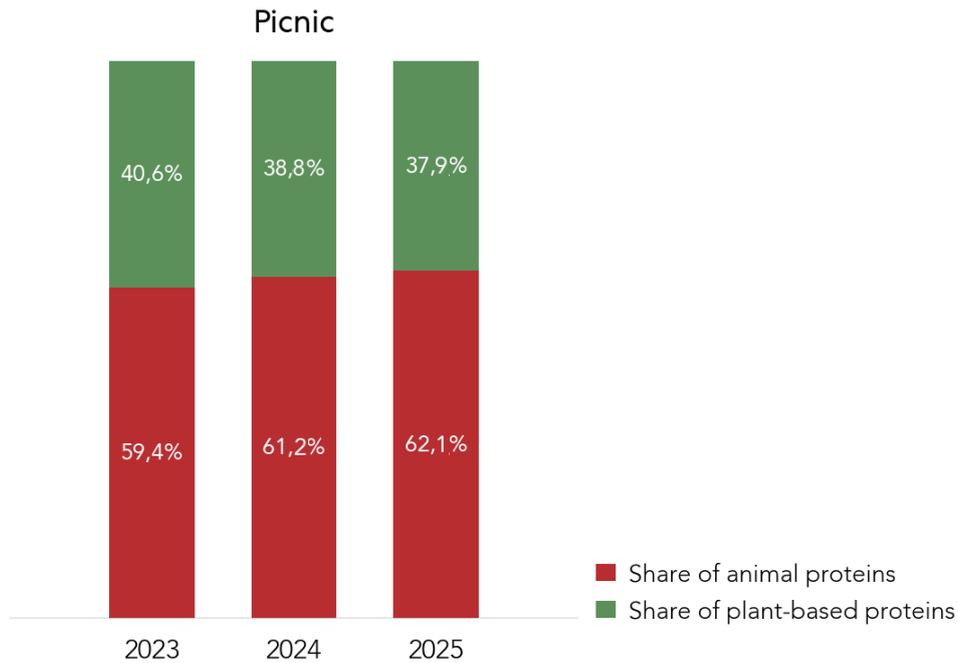


Figure 15 - Protein split Picnic

“We began disclosing our split between plant-based and animal proteins in 2023, as part of our commitment to transparency and supporting the protein transition. While we aimed to reach 50% plant-based proteins by 2025, our most recent results show that we have not yet achieved this milestone.

Changing consumption patterns takes time and requires collaboration across the entire value chain. We will continue to expand our plant-based offering, work on pricing and promotions, and engage customers in making more balanced protein choices.”

— Picnic

PLUS

PLUS carried out their assessment using data accuracy level B. For products in the animal-plant-based composite group, the default assumption of 50% plant and 50% animal protein was used.

PLUS has set a goal of 60% plant vs 40% animal protein in sales by 2030, with an intermediate goal of 50/50 by 2025. This intermediate goal has not been met.

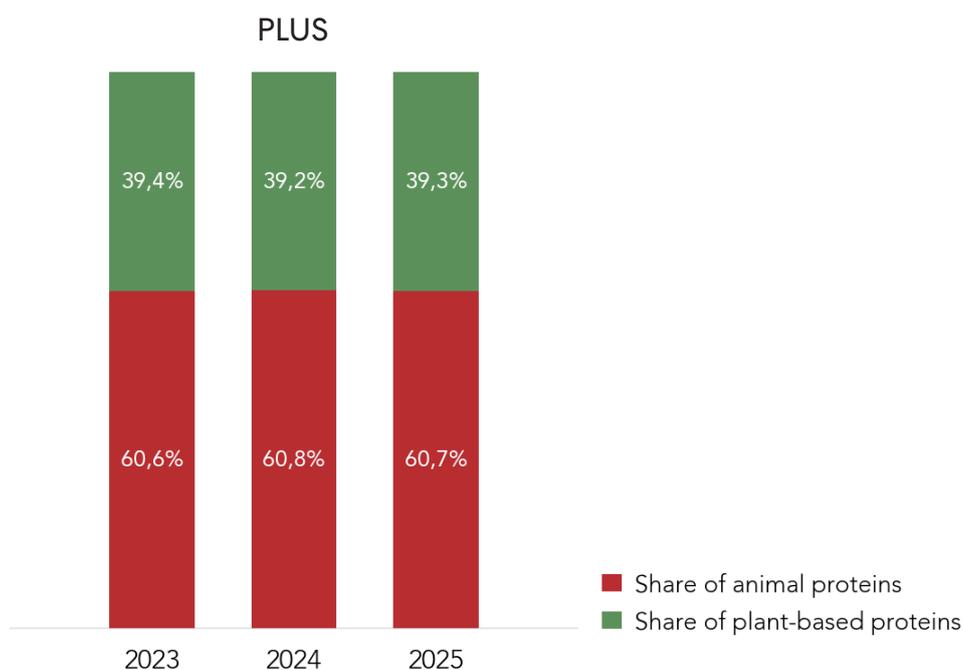


Figure 16 - Protein split PLUS

“At PLUS we believe the protein transition is an important part of the food transition. By offering conscious choices we help our customers embrace a more sustainable way of eating, step by step. Together, we’re moving towards a healthier future.”

— Petra Morssinkhof-Eijkholt, Quality Manager and CSR Commerce

Other participating supermarkets

Although not mentioned in the list above, Nettorama has carried out their Protein Tracker assessment for 2025 and their data have been validated. The protein split in their 2025 sales has been integrated into the total national average. Nettorama has chosen not to make their protein split public. Nettorama has set a target for 50% plant to 50% animal protein in their sales by 2030.

Acknowledgements

This publication is the result of a successful collaboration between NGOs and Dutch supermarkets. We thank all participating supermarkets for their efforts in the collaborative creation and implementation of our methodology.