

Supermarket

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**The Protein
Tracker
National Supermarket
Protein Split
2024**

The Protein Tracker

National assessment of plant-based versus animal proteins sold in supermarkets in 2024

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.

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THE PROTEIN TRACKER

THE SHIFT TO PLANT-BASED PROTEINS IN DUTCH SUPERMARKETS

Introduction

Almost all Dutch supermarkets have set a target to rebalance their protein sales. The current target is a 50/50 split in plant-based versus animal proteins sold by the end of 2025, moving towards a 60/40 balance by 2030 (or, in some cases, 50/50 by 2030). The targets are based on recommendations from the Dutch Health Council¹. The 60% plant / 40% animal protein target is similar to the ideal protein split as outlined in the Planetary Health Diet².

In the past year, different supermarkets have taken steps to increase the share of plant-based sales. The introduction of new (partially) plant-based products, price parity between plant-based meat and dairy and their animal counterparts, and the placement of plant-based alternatives in the meat aisle are just a few examples. Some supermarkets have also made efforts to curb their meat sales, by taking measures such as stopping all promotions on fresh beef, pork and chicken.

In order to evaluate the impact of these efforts, 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 tool that helps supermarkets track the volumes of animal vs plant-based proteins in all products for human consumption that they sell. This makes the Protein Tracker an important indicator of progress towards the 2025 and 2030 protein targets. The Dutch Ministry for Agriculture, Nature and Food Quality also uses The Protein Tracker in its protein shift dashboard³.

In 2024, the Green Protein Alliance and ProVeg Netherlands presented the first national assessment of the protein split in Dutch supermarket sales from 2023⁴. Now, a year after the first report, this report shows the next national protein split for all food products sold over 2024, to monitor supermarkets' progress towards the national target.

For this second national assessment, the Green Protein Alliance and ProVeg Netherlands looked at the protein split measured across Dutch supermarkets ALDI, Crisp, DekaMarkt, Dirk, Ekoplaza, Jumbo, Lidl, Nettorama, Picnic and PLUS for the year 2024 including a breakdown of the protein split of each individual supermarket.

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Green Protein Alliance en ProVeg Netherlands



1 - Dutch Health Council. (2023). [Gezonde eiwittransitie](#)

2 - ProVeg International, WWF, & Green Protein Alliance. (2024, 22 October). [Retailers urged to shift to 60% plant 40% animal protein](#)

3 - The Dutch Ministry for Agriculture, Nature and Food Quality. (n.d.). [Eiwittransitie - Dashboard supermarkten](#)

4 - Green Protein Alliance, & ProVeg Nederland. (2024). [Eiweet: Landelijke supermarkt eiwitverhouding 2023](#)

1. 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](#).

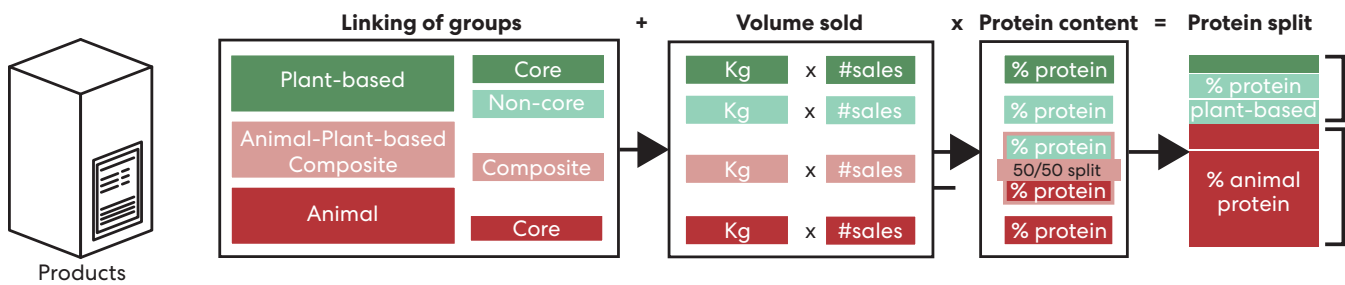


Figure 1 - Overview steps The Protein Tracker methodology

The Protein Tracker Methodology

This methodology aims to assess the ratios of animal vs plant-based proteins in supermarket sales. Data on the distribution of these proteins provides valuable insights. All products intended for human consumption are categorised 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. 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 ratio of plant-based protein. All 'animal core' and 50% of 'animal-plant-based composite' proteins count towards the ratio of animal protein. If supermarkets have data on the exact ratio of plant and animal protein in products from the 'animal-plant-based composite' group, this actual protein is used for their calculations, rather than the 50/50 default split.

A large share of the data used for the assessment can be found in supermarket databases. In cases where they do not have the right data in their database, supermarkets using the Protein Tracker may base the required data on estimates from the NEVO Online database or other reliable sources. This same strategy can be used to establish the protein ratio in 'animal-plant-based composite' products.

The Protein Tracker is the best standardised methodology to date with which to determine plant vs animal proteins in sales. All supermarkets have data available on those products that are sold in high volumes and/or have a high protein content; i.e. the products that count significantly towards the total national protein split. Additionally, using the methodology helps retailers improve the availability and accuracy of their product data during each yearly assessment.

2. The 2024 split

Participating retailers

This 2024 assessment combines the ratios of animal vs plant-based proteins sold by supermarket chains ALDI, Crisp, Dekamarkt, Dirk, Ekoplaza, Jumbo, Lidl, Nettorama, Picnic and PLUS into an average national protein split. Out of these, ALDI, Dirk, Ekoplaza, Jumbo, Lidl and PLUS already started using the Protein Tracker in 2023. Crisp, DekaMarkt, Nettorama and Picnic were first-time participants in this assessment. Major player Albert Heijn decided not to have their data validated by ProVeg and the Green Protein Alliance, which is why their data have been excluded from the assessment. The remaining smaller Dutch retailers do not yet use The Protein Tracker.

Calculations and validation of data

The participating supermarkets have carried out their own Protein Tracker calculation¹, which were then validated by the Green Protein Alliance and ProVeg Netherlands. All products for human consumption sold within the year 2024 have been included in the supermarkets' calculations. These data were then validated by the Green Protein Alliance and ProVeg Netherlands. The validation process consists of a qualitative scan and a quantitative analysis. Respectively, these involved a structured analysis of methodological consistency and a representative sampling of data.

Data improvement

Compared to the 2023 assessment, the quality of the supermarkets' data has improved in a number of ways. All participant supermarkets are reporting data at product level, meaning each product is classified into a Protein Tracker group and the precise protein content is established. For a growing number of composite products, there is now data that shows a breakdown of the ratio of plant vs animal protein in that total protein content. Data on this product-level 'protein split' were obtained from suppliers' databases or extrapolated from data on similar products from the NEVO Online database.

Wherever these data were available, the exact protein split in a composite product has been used for the assessment (rather than the default 50/50 ratio). Hybrid products too have been included with their separate animal vs plant-based protein content wherever possible.

These improvements in data quality means an increasingly accurate representation of the split between animal and plant-based protein in Dutch supermarkets. For products that contain solely plant or animal protein, the Protein Tracker already provided accurate data. These products make up the largest share of the total protein volume. For composite products ('animal-plant-based composite'), the assessment is most accurate if there is data on the exact ratio of animal vs plant protein contained in the product. Whenever these data are unavailable, supermarkets work with the assumption that 50% is plant-sourced and 50% animal-sourced. Ultimately, this could mean that improved data availability will, within time, reveal a larger share of plant protein in the total split than was previously assumed.

¹ - Green Protein Alliance, & ProVeg Nederland. (2023). [The Protein Tracker Methodology](#)

3. National Protein Split

Results

Based on validated data from all supermarkets using The Protein Tracker, the national average over the year 2024 has been calculated. The data is aggregated, so supermarkets with larger sales volumes also contribute a larger share towards the total average.

National Protein Split

The average balance of protein sold across Dutch supermarkets in 2024 sat at 41.6% plant protein vs 58.4% animal protein. For comparison: in 2023, the total protein split across Dutch supermarkets was 40.2% plant protein compared to 59.8% animal protein.

Protein split participating supermarkets over 2023

Protein split participating supermarkets over 2024

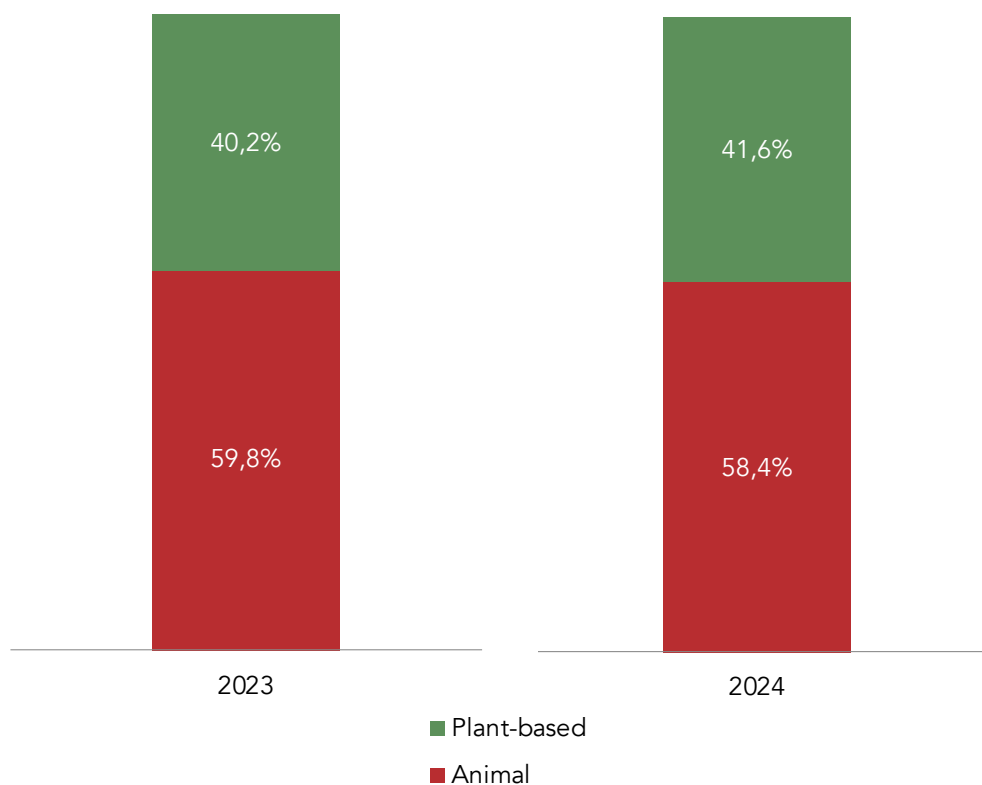


Figure 2 - National Protein Split 2024

The participation of more (online) supermarket supermarkets in this 2024 round of assessment means there now is a more complete picture of the protein split in Dutch supermarkets overall¹. The data from all participating supermarkets in 2024 helps us reach a better understanding of the most recent progress regarding the protein shift in Dutch supermarkets.

¹ - The average between the six supermarket supermarkets that participated in 2023 with the first Protein Tracker measurement show similar results (0,3% difference). The protein split of these six supermarket supermarkets in 2024 is 58,1% animal based en 41,9% plant-based.

National balance per Protein Tracker group

Compared to 2023, there is an increase in the sales volume of 'plant-based core' products and a slight decrease of sales in the 'animal core' group. There is also a visible increase in product sales from the 'animal-plant-based composite' group.

Protein split per Protein Tracker group participating supermarkets over 2023

Protein split per Protein Tracker group participating supermarkets over 2024

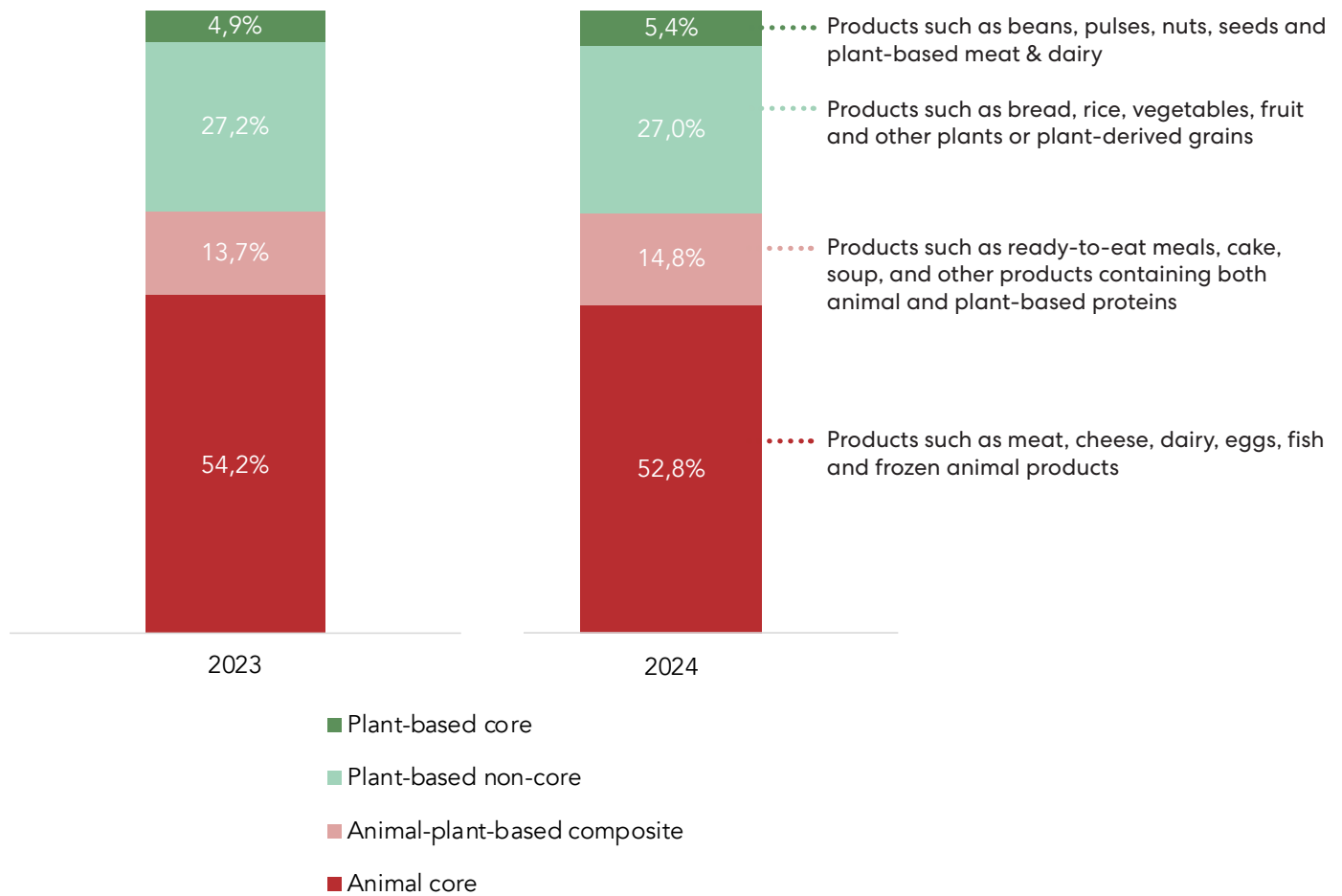


Figure 3 - National protein split per Protein Tracker group 2023 & 2024

A growing number of supermarkets are able to determine the exact split of plant vs animal proteins in their composite products, allowing them to carry out more accurate calculations than before, when the 50/50 default was used for all products containing both plant and animal protein. Our data validations showed that the increase in plant-based sales can be partially explained by an actual increase in plant-based sales, and partially by this improvement in data quality for animal-plant-based composite products.

4. The road to 60/40

The results from this 2024 supermarkets assessment show that the 'protein transition' (the shift towards plant and alternative proteins) is getting underway. This is most visible when we look at our so-called 'core categories'. In 2024, the volume of plant-based proteins sold in the group 'plant-based core' (i.e.: pulses, nuts and plant-based alternatives to meat, fish and dairy) climbed very slightly compared to 2023. At the same time, sales in the group 'animal core' (meat, fish, dairy, cheese and eggs) have dropped somewhat. Looking at the overall numbers (including the groups 'animal-plant composite' and 'plant-based non-core'), we can see a shift of 1.5 percentage point towards more plant-based protein.

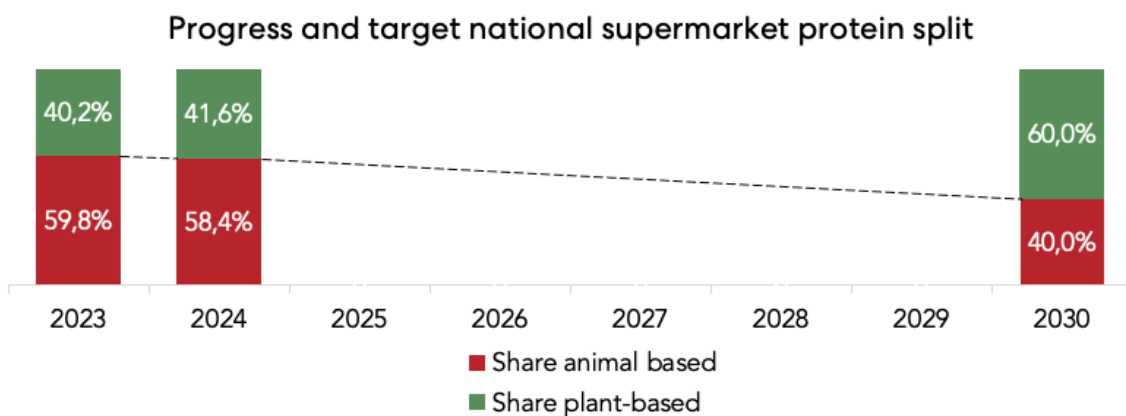


Figure 4 - Protein splits and 2030 target

However, this shift can not necessarily be seen in each of the individual supermarket supermarkets. Besides, the change is not substantial enough to bring the 60/40 by 2030 goal within reach. More drastic action is needed.

In the past year, individual supermarkets took important steps in order to accelerate the shift towards alternative proteins. Examples include stopping meat promotions for fresh meats, price drops for plant-based items, the strategic placement of vegan meats in the meat section and the introduction of new and improved plant-based items. These steps have contributed to a better balance between animal and plant proteins, but so far, they are not showing up significantly in the numbers. Especially not when measured against the large volumes of animal protein still dominating our supermarket shelves.

Supermarkets need to take more impactful measures. The national targets can only be reached if we see a drastic reduction in animal protein sold. It is essential to aim not just for an increase in plant-based sales, but also to discourage animal protein purchases. All supermarkets will need to prove themselves leaders. To take the action that is needed, supermarkets need to start working together and create a level playing field. On the other hand, consumers will need to be willing to adapt their food choices. Supermarkets carry a large responsibility when it comes to the realisation of this plant-based shift, but the rest of society will need to follow suit.

5. Breakdown per retailer supermarket

The Protein Tracker is created with input from different supermarkets. Since 2022, most supermarkets have been publishing their own protein reports. In this chapter, we briefly explain how each supermarket uses the Protein Tracker methodology. It will also show their specific targets and results.

ALDI

ALDI used product-level data to carry out its Protein Tracker calculations. In the process of this 2024 assessment, ALDI improved the accuracy of the data for products in the composite group.

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 insights into which interventions are most effective in achieving our goals.”

*– Gideon van Bussel,
Managing Director Procurement ALDI*

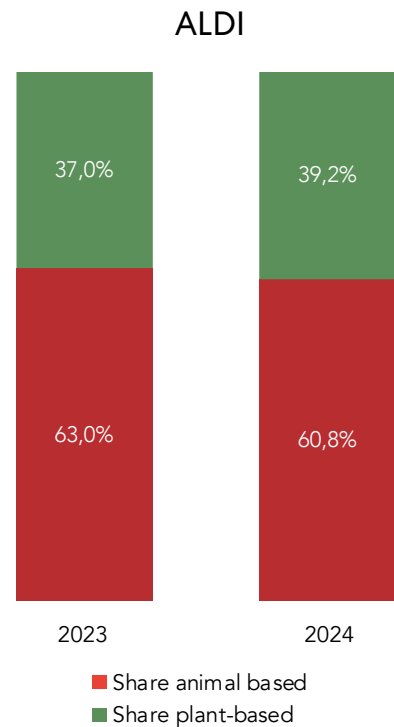


Figure 5 - Protein split ALDI

DekaMarkt

DekaMarkt carried out its calculations based on product-level data. For part of the protein split of products in the composite group, DekaMarkt used exact data on the protein content, based on suppliers' data or the NEVO Online database.

DekaMarkt has set a goal of 50% plant vs 50% animal protein in sales by 2030.

* DekaMarkt did not take part in the annual assessment of 2023. The supermarket did, however, carry out a protein assessment after the publication of the 2023 report, the data from which have been validated by ProVeg and GPA. In order to illustrate their progress, the protein split from DekaMarkt's 2023 data is shown in this report too.

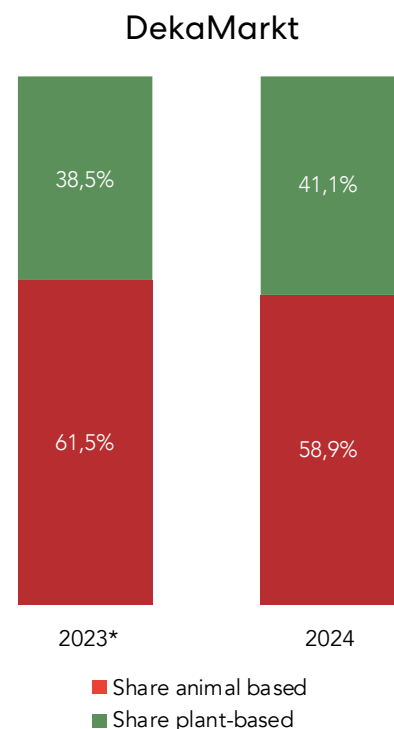


Figure 6 - Protein split DekaMarkt

Dirk

Dirk carried out their calculations based on product-level data. For products in the composite group, they worked with the 50/50 animal/plant default ratio.

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.

“For many people, choosing plant-based foods is not yet part of their routine. That’s why we are continuously nudging customers by offering food inspiration, discounts and information on the benefits of plant-based eating.”

*– letse van Zwieten,
Sr. Category manager Dirk*

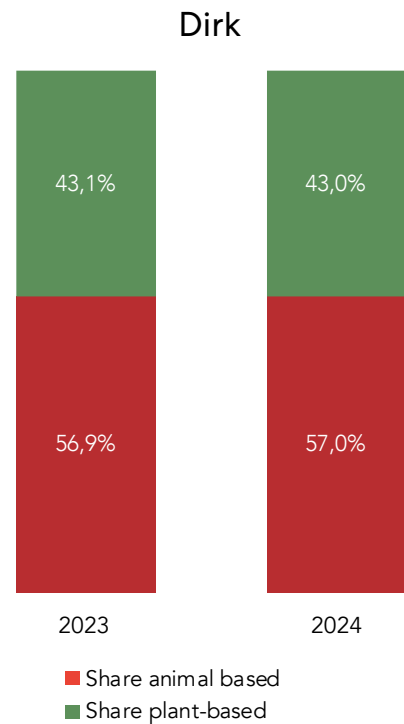


Figure 7 - Protein split Dirk

Ekoplaza

Ekoplaza carried out their calculations based on product-level data. For products in the composite group, they worked with the 50 % plant /50% animal default ratio.

Having already achieved the 50%/50% protein split from the national guidelines, Ekoplaza sharpened their target: they want to achieve a 70% plant-based vs 30% animal protein split by 2030.

“We at Ekoplaza are proud to announce that we’ve already achieved our 2030 target. In the next few years, we will keep pushing to accelerate the shift towards plant-rich diets.” - Ekoplaza

- Ekoplaza

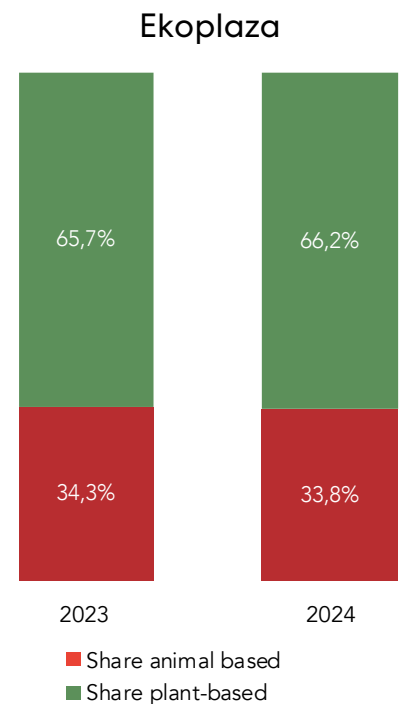


Figure 8 - Protein split Ekoplaza

Jumbo

To establish the protein ratio in composite products, Jumbo has been using the nutrition declaration of the specific products whenever possible. If no nutrition declaration was available, Jumbo used data from the NEVO Online database to establish plant and animal protein content. NEVO lists the average protein content per product category, meaning it is to be interpreted as an approximation.

In the 2023 assessment, Jumbo reported 41% over 2023 for plant-based. Thanks to improved data quality in this assessment, we had to adjust the 2023 percentage to 43.6%, allowing for more accurate comparison to this year's results.

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

“Jumbo wants to help accelerate the shift towards plant-based, with a goal of 60% plant protein in sales by 2030. We want to help customers achieve a better balance of animal vs plant-based on their plates - making the Dutch diet both healthier and more sustainable.”

*-Marjolein Verkerk,
Manager Corporate Communicatie & MVO*

Lidl

Lidl has carried out their calculations using product-level data. For products in the composite group, they worked with the 50/50 default ratio. Their special promotions were not included in the assessment.

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.

“In 2024, Lidl took a number of significant steps to promote plant-based sales. We've created price parity for all plant-based essentials such as meats and yogurts, so the plant-based option is always an attractive option compared to the animal alternative. With these steps, we hope to encourage customers to include more plant-based foods in their diets.”

*- Quirine de Weerd,
Senior Manager CSR & Relations Lidl*

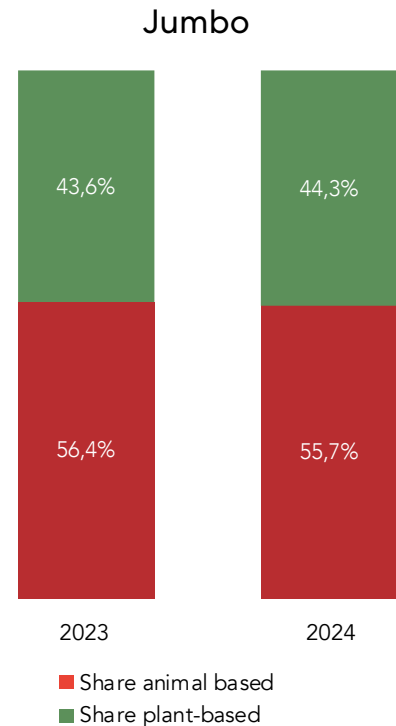


Figure 9 - Protein split Jumbo

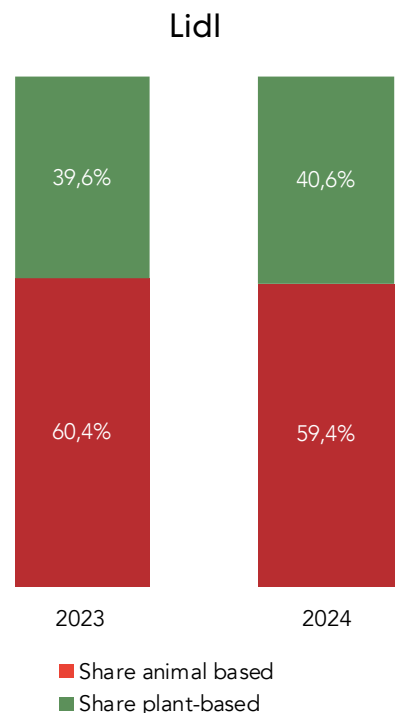


Figure 10 - Protein split Lidl

Picnic

Picnic carried out their calculations using product-level data. For products in the composite group, Picnic worked with the 50/50 default ratio.

Picnic has set a goal of 60% plant vs 40% animal protein in sales by 2030.

* Picnic did not participate in the 2023 assessment. Picnic did however carry out an assessment of their own for this year, the data from which have been assessed by ProVeg and the GPA. In order to illustrate their progress, we have included Picnic's 2023 protein split in this report.

“At Picnic, we take a holistic approach to sustainability - the food we eat shouldn't just be good for the planet, it should also benefit our own health. The shift towards more plant-rich diets helps to tackle both issues at the same time.”

- Picnic

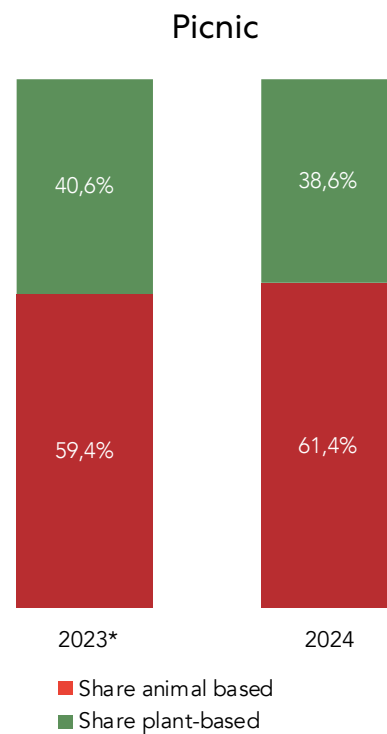


Figure 11 - Protein split Picnic

PLUS

PLUS carried out their calculations using product-level data. To establish the protein split for products in the composite group, PLUS used individual product data as well as the 50/50 default ratio whenever specific data were not available.

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

“PLUS is a strong believer of the ‘protein transition’ as a crucial part of food system change. By offering more conscious options, we help customers gradually embrace a greener diet. Together, we can create a healthier future.”

- PLUS Retail

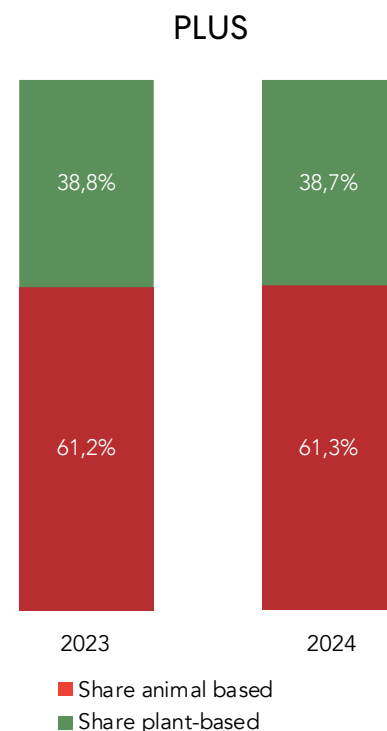


Figure 12 - Protein split PLUS

Other participating supermarkets

Crisp

Crisp has done a Protein Tracker calculation for a large portion of their products sold in 2024, and these figures have been validated. The results have been incorporated into the overall national protein split. However, Crisp has chosen not to publish this ratio because the validated analysis does not yet include the dataset of Crisp meal boxes and hybrid products for 2024. To ensure an accurate representation, Crisp will include this in the analysis over the data of 2025 and will make those results public then. Crisp's goal is to achieve a protein ratio of 60% plant-based and 40% animal-based by 2030.

Nettorama

Nettorama carried out an assessment of their 2024 protein sales and had their data validated according to the Protein Tracker methodology. Nettorama's sales data have been incorporated into the overall national protein split. The supermarket has chosen, however, not to publicize their exact protein split. Nettorama has set a target of 50% plant-based vs 50% animal protein by 2030.

Supermarkets that did not take part

Albert Heijn

Since Albert Heijn decided not to have their data validated by ProVeg and the Green Protein Alliance, Albert Heijn's protein balance outcome has been excluded from the assessment and does not count towards the 2024 national protein split. Albert Heijn aims to achieve a 60% plant vs 40% animal protein split by 2030, with an intermediate 50/50 goal by the end of 2025.

Other

Other supermarkets operating in the Netherlands (not mentioned in this report) have not yet measured officially with The Protein Tracker.

Acknowledgements

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