

The Canadian retailer's playbook for plant-powered growth:

Driving sales, meeting climate goals, and winning new customers

An evidence-based
guide from:





A letter from World Animal Protection

Dear Retail Partners,

World Animal Protection is a global nonprofit organization dedicated to ending animal suffering. For over 75 years, we have worked with governments, businesses, and communities to protect animals and transform the systems that significantly compromise their welfare. Our food systems work focuses on shifting toward plant-rich diets and higher-welfare practices, benefiting animals, people, and the planet.

As you know, the way Canadians eat is changing. A growing number of your customers are looking to add more plant-based options to their diets. They want choices that are good for their health, good for their families, and increasingly, good for the planet.

At the same time, your businesses are facing critical challenges: delivering growth in a competitive market, managing inflation, meeting ambitious climate targets, managing Scope 3 emissions and improving animal welfare commitments. These goals may feel disconnected from the day-to-day reality of category management and merchandising. But the evidence tells us they are deeply connected.

As this playbook highlights, global leaders like Lidl and Tesco have proven that a strategic approach to plant-based sales drives category growth, strengthens customer loyalty, and delivers measurable climate progress, all without cannibalizing core sales. Yet in Canada, the sector is at a crossroads. Sales have softened. Consumer confusion persists. And the link between ESG commitments and category strategy remains unclear.

This playbook bridges that gap. It's a practical, cross-functional tool built on global best practices and shaped by Canadian retailer and supplier insights. **Its focus is simple: actionable tactics that drive sales.**

We invite you to use this playbook as a catalyst to align your teams, test new approaches, and capture the opportunities in plant-powered growth. When you succeed, your customers benefit, your business grows, and together we build a more sustainable, resilient food system for Canada.

Sincerely,

World Animal Protection Canada

Table of contents

Executive summary	4
About the playbook	6
Part A: Why a plant-based strategy is good for business	7
A1. From niche to mainstream	8
A2. Flexitarianism: One of the fastest-growing dietary trends.....	8
A3. The \$1.4 billion opportunity	9
A4. Global retail pioneers prove plant-based growth is real	10
A5. The sustainability imperative & ESG advantage	12
Part B: The path to growth – move from strategy to shelf	13
B1. Phase 1: Foundation – laying the groundwork	14
B2. Phase 2: Accelerate – driving demand & sales	19
B3. Phase 3: Lead – setting the pace	26
Part C: Tools & resources	31
C1. Implementation checklist	31
C2. Case study library	32
C3. Partner directory	38
Conclusion & call to action	39
How World Animal Protection can help	40

An evidence-based guide by:
World Animal Protection
Prepared with support from Reeve and Green Chain consultants

© World Animal Protection 2026.
World Animal Protection is a registered Canadian charitable organization.
No. 12791 9076 RR0001



Executive summary

The \$1.4 billion opportunity

Canada's plant-based food market is valued at \$1.4 billion and is projected to grow to more than \$3 billion by 2033. Yet many retailers are leaving money on the table. Sales have softened. Consumer confusion persists. And the link between climate commitments and category strategy remains unclear.

Global leaders prove plant-based growth is real

The global plant-based protein market is set to grow from \$24bn to possibly \$47bn in 2033¹. To take advantage of this, these global retail leaders implemented plant-based strategies with great effect:

- Lidl Germany: Price parity plus integrated placement drove a 30% sales lift²
- Dutch retailers: Collective action plus standardized measurement pushed national plant-based protein share to 42%³
- Tesco UK: Strategic pivot to "veg-led" whole foods now represents 40% of plant-based sales⁴

The growth is coming from flexitarians

Canadian consumers want plant-based options without full commitment. They're driven by health, blocked by price, and looking for easy swaps. Price is the #1 barrier, and it's a lever you control.⁵

The bottom line

Plant-based isn't about replacing meat sales – it's about growing your total basket. Study after study shows growth is incremental, not cannibalistic.

.....

The question isn't whether this category will grow. It's whether you'll capture that growth.

.....



The recommended implementation journey

Phase	Focus	For retailers who are	Tactics
1. Foundation	Laying the groundwork	Just starting, scattered efforts, no baseline	• Build your cross-functional team • Measure your baseline • Analyze your assortment • Diagnose your price gaps
2. Acceleration	Driving demand & sales	Ready to test, pilot, and scale	• Transform placement • Execute price changes • Launch strategic promotions • Remove barriers to purchase
3. Leadership	Setting the pace	Ready for targets, measurement, and story telling	• Set a SMART target • Measure what matters • Engage your ecosystem • Tell your story

Start where you are

You don't need to complete every phase before moving forward. Use the checklist at the back to track progress and prioritize what matters for your business.

About the playbook for plant-powered growth

What is this playbook?

This playbook is a practical, action-oriented roadmap for Canadian grocery retailers ready to capture the growing plant-based opportunity. It translates global best practices and local retailer insights into actionable strategies that drive sales, build customer loyalty, and support ESG goals.

It's not a research report. It's a tool for execution.

Who is it for?

This playbook is designed for cross-functional retail teams, including:

Team	Role
 Sustainability	ESG reporting, target setting, stakeholder engagement
 Merchandising	Category management, assortment, placement, pricing
 Marketing	Customer insights, promotions, storytelling, education
 Sourcing	Supplier relationships, private label, innovation
 Data	Sales tracking, baseline measurement, performance reporting



How is it structured?

This playbook is organized into three parts:

- 1. Part A: Why a plant-based strategy is good for business:**
The market opportunity, Canadian consumer trends, global proof points, and the ESG case – all the evidence you need to build internal buy-in.
- 2. Part B: The path to growth – move from strategy to shelf:**
Three phased implementation stages with 12 actionable tactics. Each tactic includes lead roles, key steps, and real-world “See it in action” examples.
- 3. Part C: Tools & resources:** Implementation checklist, case study library, and partner directory.

Note: World Animal Protection developed this playbook as a resource, but we're also a partner and we're here to help. Find out how we can help at the end of the playbook.



Part A: Why a plant-based strategy is good for business

Canadian grocery retailers operate in a rapidly evolving food landscape shaped by changing consumer preferences, innovation in plant-based products, and increasing expectations around sustainability and health. Developing a clear plant-based strategy is not about reducing choice, but about strengthening category performance, responding to growth opportunities, and aligning with long-term business and ESG priorities. The following outlines key commercial, consumer, and strategic reasons why a plant-based approach can support retail leadership and growth.

A1. From niche to mainstream

For years, plant-based products have been managed as a niche category, confined to dedicated sections, treated as an “alternative” for a small subset of customers. **Today, plant-based is mainstream.** It spans dairy, meat alternatives, and ready meals – and plant-based foods are increasingly recognized by consumers as a healthy and valuable source of protein.

The opportunity is no longer about managing an isolated “free-from” or “vegan” section. It’s about actively shaping the overall balance of plant-based versus animal-derived products across your sales categories to capture a growing, fragmented, mainstream customer base.



A2. Flexitarianism: one of the fastest-growing dietary trends

The Canadian consumer is ready for the shift

Between Fall 2024 and Spring 2025, the share of Canadians identifying as flexitarians increased from 4.6% To 5.5%,⁶ While omnivores dropped from 67.6% To 60.8%.⁷ But here’s the critical insight: plant-based sales growth is not being driven by vegetarians or vegans.

The growth is coming from flexitarians – those who prioritize plant-based foods but still consume meat and dairy. This category now represents a significant and growing segment of Canadian consumers. Millennials and Gen Z are leading the way with highest rates of plant-based eating (younger Canadians ages 20-40), particularly in British Columbia. These are your future core shoppers.

What’s driving their choices?

Health is the primary motivator. Consumers are increasingly aware of the health benefits associated with plant-based diets, including lower risks of chronic diseases such as heart disease, diabetes, and obesity.

The #1 barrier: price

Despite the interest, price remains the primary obstacle. Market research confirms that higher prices of certain plant-based products compared to conventional meat and dairy is a key market restraint.

What this means for retailers

Canadians aren’t looking to make a political statement or overhaul their entire diet. They’re making “quiet negotiations, shaped by factors such as taste, cost and convenience, one plate at a time” they’re looking for easy swaps within their familiar shopping patterns.

.....

The opportunity is clear: a growing base of flexitarian consumers, driven by health, open to taste, but blocked by price. And price? That’s a lever you control.

.....

A3. The \$1.4 billion opportunity

The market is real and growing

Canada's plant-based food market is currently valued at \$1.4 billion, with dairy alternatives alone projected to reach \$1.93 billion by 2030.⁸ The plant-based protein market like meat alternatives, tofu, pulses, is on its own trajectory: from \$381.5 million in 2024 to \$633.4 million by 2033.⁹

Plant-based dairy continues to post robust growth in both volume and value, as consumers increasingly view these options as healthier than conventional dairy. The meat alternatives category has seen relentless innovation, with brands closing the taste and texture gap with conventional products.

Who's buying? The high-value customer

Plant-based shoppers aren't a niche; they're some of your best customers. Research consistently shows that they spend more per trip than the average shopper and they're loyal once they find brands they trust, they stick with them.¹⁰

The bottom line

Plant-based isn't about replacing existing purchases, it's about growing your total basket and increasing customer loyalty. Study after study shows plant-based growth is incremental, not cannibalistic. Customers who buy plant-based also buy produce, packaged goods, and yes, sometimes meat too.

.....

The question isn't whether this category will grow. It's whether you'll capture that growth, or potentially watch it go to competitors.

.....



Canada's plant-based food market is currently valued at

\$1.4 billion,
with dairy alternatives alone
projected to reach
\$1.93 billion
by 2030.⁸

.....

The plant-based protein market like meat alternatives, tofu, pulses, is on its own trajectory: from

\$381.5 million
in 2024 to
\$633.4 million
by 2033.⁹

.....



A4. Global retail pioneers prove plant-based growth is real

The global plant-based protein market is projected to grow from USD\$24bn to possibly USD\$47bn in 2033.¹¹ Leading retailers have moved beyond treating plant-based as a niche category. They've embedded it into their core growth strategy, and the sales results speak for themselves.

The motivations vary by market and company, but common drivers emerge responding to shifting consumer preferences, meeting climate and biodiversity targets, aligning with national dietary guidelines, and future-proofing against resource constraints like land use and emissions caps.



Lidl Germany (The Discounter Blueprint)

- Committed to a 20/80 plant/animal protein split by 2030.
- Introduced price parity on its private-label Vemondo range in 2023.
- Placed plant-based products next to meat in all 3,250+ stores.
- *Result: Vemondo sales increased by over 30% since the introduction of price parity initiatives*

Key driver: Aligning with the Planetary Health Diet to make sustainable, healthy eating accessible to all, while appealing to younger, climate-conscious shoppers.



The Dutch collective model

- All major Dutch retailers¹² have adopted a 60/40 plant/animal protein target by 2030.
- Enabled by the standardized protein tracker tool for transparent, comparable measurement.
- Created a “race to the top” across the sector for retailers to compete on progress.
- *Results: National plant-based protein share reached 42% in 2024.*

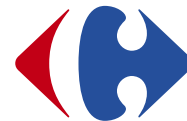
Key driver: Responding to advocacy pressure (e.g., Groups like Wakker Dier), national policy direction on climate, and land-use constraints – positioning plant-based as a practical solution for a more resilient food system.



Tesco UK (mainstream integration)

- Set a target in 2020 to grow plant-based meat alternative sales by 300% by 2025 (actual sales growth in 2024/25 was 94% vs baseline of 2018).
- Launched own-label ranges: Wicked Kitchen and affordable Plant Chef (now 180+ products).
- Evolved strategy to include “veg-led” whole foods as consumer preferences shifted.
- *Results: Diversified plant-based strategy beyond the meat alternatives. Veg-led whole foods now represent 40% of all plant-based sales. Nearly 600,000 additional veg-led dishes sold in 41 weeks. Tofu and tempeh saw double-digit growth, with plant-based mince up nearly 25%.*

Key driver: Responding to customer demand for healthier options and halving the environmental impact of the average shopping basket, in partnership with WWF.



Carrefour (the coalition builder)¹³

- Set a target of **€500 million in plant-based sales by 2026** (a 65% increase from 2022).
- Formed an **international coalition with seven major manufacturers** (Danone, Unilever, Bel, Andros, Bonduelle, Nutrition & Santé, Savencia) committing to **€3 billion in plant-based sales by 2026**.
- Committed to reducing indirect CO₂ emissions (scope 3) by **29% by 2030**, with plant-based playing a significant role.
- **Result:** Between 2015 and 2023, the share of French households with at least one flexitarian nearly doubled from **25% to 45%**.

Key driver: Addressing inflation (affordable plant-based meals) and climate goals (reducing carbon footprint of diets) simultaneously, while responding to surging flexitarian demand.

A5. The sustainability imperative & ESG advantage

Leading global retailers are increasingly aligning their product strategies with broader ESG commitments, including net-zero targets and Scope 3 emissions reductions. Expanding plant-based offerings can support these objectives, as plant-based proteins typically generate anywhere between 30–90% lower greenhouse gas emissions and require significantly less land and water per serving compared to animal-derived proteins.¹⁴

Food systems account for roughly one-third of global greenhouse gas emissions, with animal agriculture representing a substantial share of that footprint.¹⁵ By broadening plant-based options, retailers can help lower the overall environmental intensity of their protein category while maintaining a diverse and resilient product mix.

Expanding plant-based options also supports broader sustainability goals, including **animal welfare** by reducing reliance on intensive farming systems, and **public health** by aligning with Canada's Food Guide.

.....

By reducing reliance on animal-derived ingredients, businesses directly decrease demand for intensive farming systems associated with animal suffering, high greenhouse gas emissions, deforestation, and antibiotic overuse.

.....

Importantly, this is not about reducing choice but about expanding options and supporting a balanced protein product mix that meets evolving consumer demand and sustainability goals.

Why this is happening now

Leading retailers are responding to a convergence of pressures: national legislation (Net-zero targets, EU Farm to Fork, Denmark's Plant-Based Action Plan), UN commitments (Paris Agreement, SDGs), investor pressure (Climate Action 100+), and growing consumer demand from the flexitarian majority.

These pressures are already emerging in Canada. With federal net-zero targets, and growing investor expectations for credible Scope 3 reporting, Canadian retailers should expect similar expectations to materialize.

For retailers, this is not just about aligning with global trends—it's about responding to a distinctly Canadian convergence of policy signals, investor expectations, and shifting consumer behaviour that is already reshaping the market.

The risk of inaction

- Climate risk: Missing the most impactful lever for Scope 3 reductions.
- Policy risk: Falling out of step with national dietary strategies and future ESG regulations.
- Commercial risk: Losing relevance as consumer sustainability expectations rise.

The opportunity

When you shift sales toward plant-based proteins, you're not just reducing emissions – you're offering customers more choice, supporting animal welfare, improving health outcomes, strengthening food security and helping build a more resilient food system. **That's a story worth telling.**



Part B: The path to growth – move from strategy to shelf

This is where strategy becomes action. The following sections provide a phased roadmap, grounded in what works and tailored to the realities of Canadian grocery retail.

How this section works:

- **Phased approach:** Organized by strategic maturity – start where you are, progress at your own pace.
- **Embedded case studies:** Each key tactic will include a “see it in action” box with a brief, relevant example.
- **Team relevance icons:** Small, subtle icons at the start of each subsection will indicate which internal teams will find it most actionable:



Sustainability



Merchandising & Category Management



Marketing & Communications



Sourcing & Supplier Relations



Data

B1. Phase 1: Foundation – laying the groundwork



Objective:

Build the internal case and commercial readiness to grow plant-based sales profitably. Establish the foundational capabilities – team alignment, data visibility, and category understanding, needed to drive plant-based growth with confidence.

Strategies ideal for retailers who:

- Are just starting their plant-based strategy journey and/or want to build a strong foundation before scaling
- Have scattered efforts across different teams with little coordination
- Don't currently track plant-based sales as a distinct metric
- Suspect they have assortment gaps but haven't analyzed them systematically

1.1 Build your cross-functional team

Lead:  Sustainability

Involved:  Merchandising |  Marketing |  Sourcing

Why this matters: Plant-based growth touches every part of your business – from sourcing to merchandising to marketing. If these teams aren't aligned, your strategy will stall before it starts.

Key steps:

- 1 Identify and engage your internal champion.** Find a senior leader with influence who can own the initiative – a Category Manager, Sustainability Lead, or Merchandising Director. Build their support with a clear business case highlighting commercial opportunities, alignment with ESG goals, and examples of successful retailer strategies.
- 2 Map your stakeholders.** List everyone who needs a seat at the table: Merchandising (category owners), Marketing (customer comms), Sourcing (supplier relationships), Sustainability (ESG reporting), and Store Operations (in-store execution).
- 3 Schedule a kick-off meeting.** Bring the group together to review the opportunity (Part A of this playbook), align on goals, and agree on next steps.
- 4 Define roles and accountability.** Who owns pricing decisions? Who tracks sales data? Who communicates with suppliers? Make it clear.
- 5 Set a regular cadence.** Monthly check-ins keep momentum and surface challenges early.

See it in action: Vancouver Humane Society (cage-free eggs)

When Vancouver Humane Society worked with Overwaitea to promote cage-free eggs, they started by aligning a cross-functional team: merchandising (placement), marketing (signage), and operations (employee training). The result? Cage-free egg sales jumped to 40% through labelling, signage, and employee training – without changing prices.



1.2 Measure your baseline

Lead:  Merchandising

Involved:  Data

Why this matters: You can't manage what you don't measure. Before you can set targets or track progress, you need a clear, repeatable way to measure your current plant-based sales.

Key steps:

- 1 Define your scope.** Start with key plant-based protein categories: meat alternatives, dairy alternatives, ready meals, and whole foods (tofu, beans, lentils).
- 2 Run the numbers.** Work with your data team to pull sales data for the selected categories for the last 12 months. This gives you a baseline and accounts for seasonality. Include both dollar sales and unit sales for a complete picture.
- 3 Calculate your plant-based sales ratio.** Use this simple formula: $\text{Plant-Based Sales Ratio} = (\text{Total sales of plant-based products in selected categories}) \div (\text{Total sales of all products in those categories}) \times 100$
- 4 Document your methodology.** Note which categories and SKUs are included so you can measure consistently over time.
- 5 Share the baseline with your cross-functional team.** Make sure everyone understands where you're starting from.

See it in action: The Dutch Protein Tracker

Dutch retailers use a standardized tool called the Protein Tracker to measure their plant/animal protein split. Over 90% of the Dutch grocery market now reports using this methodology, enabling transparent comparison and healthy competition. The national plant-based protein share reached 42% in 2024.



1.3 Analyze your plant-based assortment

Lead:  Merchandising

Involved:  Sourcing |  Marketing

Why this matters: A balanced assortment of plant-based options meets customers where they are – whether they’re looking for quick swaps, whole food ingredients, or indulgent treats. Gaps in your plant-based assortment means missed sales.

Key steps:

1 Understand customer needs. Work with marketing to gather customer insights through surveys, loyalty data, or category analysis. Understand what your shoppers, especially flexitarians, are looking for and where they see gaps today.

2 Conduct internal gap analysis. Map your current plant-based offerings against the categories below. Where are you thin? Where are you missing entirely?

Category	Examples	Your current SKU count
Plant-based milk	Oat, almond, soy, blends	
Plant-based meat	Burgers, sausages, grounds	
Plant-based dairy	Yogurt, cheese, butter, ice cream	
Ready-to-cook meals	Marinated tofu, bean-based bowls	
Whole foods	Lentils, chickpeas, beans, tofu	
Snacks & bakery	Protein bars, plant-based baked goods	

3 Review plant-based private label opportunities. As your own brands give you margin control and pricing flexibility, identify categories where private label plant-based options could fill gaps or offer better value.

4 Find opportunities across consumer needs. Work with sourcing to ensure your plant-based assortment serves different use cases:

- *Quick swaps: Plant-based milk, burgers, dips*
- *Meal solutions: Ready-to-cook tofu, bean-based bowls, veg-led meals*
- *Whole food (and low fat) proteins: Lentils, beans, chickpeas*

5 Test and learn. Use small-store pilots to test new SKUs before rolling out chain-wide. Monitor velocity and adjust.

See it in action: Tesco’s veg-led pivot

When Tesco noticed consumers shifting away from processed meat alternatives toward whole foods, they adjusted their assortment to include more “veg-led” options. The result? Veg-led products now make up 40% of all plant-based sales, with tofu and tempeh growing at double digits.



Tesco’s Plant Chef range (180+ products, own-label, accessible price point) is its best-performing plant-based line – a direct result of private label strategy.

See it in action: The European private label model proves the case

In Europe, private label is the primary driver of plant-based market growth where it’s succeeding. In markets where plant-based private label has expanded rapidly (Germany, Spain, Italy), total plant-based volumes have grown even as branded products stay flat.

Lidl’s Vemondo is the clearest proof of concept: German retailer introduces price parity on own-brand plant-based range in Oct 2023 and achieves over 30% sales increase per a 2024 ProVeg study cited by Schwarz Group.



Private label trends

The data strongly supports private label as the primary lever for making plant-based affordable and driving volume.

The big stat	Claim	Source
\$271B	US private label sales hit record high in 2024 – up 3.9% vs 2023; national brands grew only 1%	PLMA / Circana, Jan 2025
3x faster	Private label unit sales growth vs national brands since 2021 (PL up 2%, national brands down 7%)	PLMA / Circana, 2025
71%	US shoppers rate private-label food quality as equal to or better than national brands	FMI Power of Private Brands 2024
+13.9%	Private-label plant-based volume growth in Germany in 2024; Spain +13.1%; Italy +11.8% (vs branded staying flat)	GFI Europe / Circana, 2025
40%	Typical gross margin for retailer private label vs 25–35% for national brands	Just-Food / GlobalData analysis, 2025
+5%	Year-over-year increase in private label adoption among Gen Z and Millennials – the core plant-based demographic	Numerator, June 2025

Recommendation

Canadian retailers are encouraged to launch or expand own-brand plant-based lines – particularly in dairy alternatives, mince, and veg-forward ready meals. Private label gives the retailer margin control, price flexibility, and the ability to drive switching without depending on branded manufacturers to reduce prices.

Growing plant-based categories

The Good Food Institute (GFI)'s 2024 US retail data (SPINS/Circana) reveals a nuanced picture:

- Tofu, tempeh & seitan: double-digit growth at Tesco; strong US growth (GFI 2024)
- Plant-based cheese: +11% globally in 2024 (GFI/Euromonitor)
- Plant-based protein powders, bars & RTD beverages: growing in 2024
- Veg-led whole foods (cauliflower, lentil dishes, etc.): 40% of all plant-based sales at Tesco
- Plant-based milk in foodservice: +9% dollar, +6% volume in 2024 (GFI)
- Private-label plant-based across Europe: volumes up 13.9% in Germany, 13.1% in Spain, 11.8% in Italy in 2024 (GFI Europe)



Critical nuance

The plant-based market is not uniformly growing or declining – it is BIFURCATING. Highly processed meat alternatives are struggling, while whole-food plant proteins (tofu, tempeh, lentils, cauliflower, mince), private label, dairy alternatives in foodservice, and protein supplements are growing. Canadian retailers should build strategy around the growth categories, not defend the declining ones.

1.4 Diagnose your price gaps

Lead:  Merchandising

Involved:  Sourcing |  Sustainability |  Data

Why this matters: Price is the #1 barrier for shoppers. But before you can fix it, you need to understand where the gaps are, and what it would take to close them.

Key steps:

- 1** **Map your current pricing.** For key categories (dairy, burgers, etc.), compare:
 - Plant-based private label vs. conventional private label
 - Plant-based national brands vs. conventional national brands
 - Plant-based private label vs. plant-based national brands (your competitors)
- 2** **Quantify the gap.** For each comparison, calculate the price difference in dollars and percentage. Work with your data team to pull this consistently.
- 3** **Identify quick wins.** Which gaps are smallest? Where is volume highest? Where do you have private label control? These are your best candidates for early action.
- 4** **Model margin impact.** Understand the implications of absorbing margin temporarily, accepting lower margins for volume growth, or testing price parity in select regions.
- 5** **Socialize the strategy.** Present your findings to the cross-functional team. Build understanding that addressing price gaps is a growth investment, not just a cost.

See it in action: Using private label to close price gaps

In a 2026 interview, a major Canadian retailer noted that their private label plant-based options were helping sales grow by offering better value to price-sensitive consumers. This came from a simple diagnosis: comparing the price of national brand plant-based products to conventional alternatives revealed a significant gap deterring customers. By understanding where the price barrier was highest, the retailer prioritized private label development in those categories – giving shoppers an affordable entry point without waiting for national brands to adjust pricing.

B2. Phase 2: Accelerate – driving demand & sales of plant-based foods



Objective:

Turn your foundation into momentum by making plant-based options impossible to miss, easy to afford, and simple to understand – driving trial among flexitarians and building loyalty among core buyers.

Plant-based shoppers aren't a niche, they're some of your best customers. Research consistently shows that they spend more per trip than the average shopper and they're loyal once they find brands they trust, they stick with them.

Strategies ideal for retailers who:

- Have operationalised foundational work (team alignment, baseline measurement, assortment and price analysis)
- Are ready to test and scale tactics that directly impact sales
- Want to capture the flexitarian majority by removing friction points
- Have buy-in from key departments and need executional strategies



2.1 Transform product placement

Lead:  Merchandising

Involved:  Sourcing

Why this matters: Where you put plant-based products sends a signal to shoppers. Studies show integrated placement (next to conventional counterparts) can drive **+23% to +31% sales lifts**¹⁶ for plant-based products, helping consumers make a simple swap. Dedicated sections can help dedicated shoppers but may hide options from customers exploring plant-based options or from everyday shoppers looking to mix it up. The right strategy depends on category and consumer mindset.

Key steps:

1

Map placement by category. Merchandising and sourcing to assess current placement across key categories:

Category	Current placement	Opportunity
Plant-based milk		Dedicated section or integrated with dairy?
Plant-based meat		Next to conventional meat or separate?
Plant-based dairy		Next to conventional dairy or separate?
Tofu/tempeh		Produce, deli, or dedicated?

2

Consider category nuances. Not all categories behave the same:

- Earth's Own found non-dairy milk sells better in a **dedicated section**. Consumers seek it out specifically, and dairy volume would overwhelm shelf space.
- Daiya and the Vancouver Humane Society found placement next to conventional counterparts drives substitution for cheese, meat, and eggs.

3

Pilot before scaling. Work with sourcing to select test stores for placement changes. Monitor velocity for 8-12 weeks.

4

Engage suppliers. Sourcing can bring key suppliers into the conversation. Some may offer promotional support for new placement tests.

5

Update planograms. Once pilots prove success, sourcing and merchandising to roll out changes chain-wide.



See it in action: Lidl Germany: Integrated placement across 3,250+ stores

When Lidl Germany committed to its protein strategy, one of the first moves was placing plant-based products next to meat in every store. No separate “vegan” section. No hiding in the free-from aisle. The result, combined with price parity, was a 30% sales lift in six months.



Product placement studies

Multiple studies now show that where plant-based products are placed in store has a measurable effect on sales – and that integration into conventional aisles is more effective than isolation in a specialty section. However, nuance is needed:

Study	Finding	Implication
Kroger / PBFA (US, 2020) – 60 stores, 12 weeks	Plant-based meat sales increased 23% when placed in the meat department vs. a refrigerated vegetarian section	Co-location with conventional meat drives trial among non-vegans – the target flexitarian audience
UK supermarket field study, PLOS Medicine (2021) – 108 UK stores	Placing meat-free products in the meat aisle significantly increased meat-free sales (sustained over time). Crucially: conventional meat sales did NOT decrease. Effect was strongest in lower-affluence stores.	Co-location grows plant-based sales without cannibalising meat – a strong argument against retailer fear of category loss
Dutch supermarket field studies (ScienceDirect, 2025)	Moving ALL meat substitutes to meat shelf backfired and decreased sales. Moving a SELECTION (while maintaining a separate vegetarian shelf) increased meat substitute sales, especially among meat-eaters and flexitarians.	Best practice: DUAL placement – some items in meat aisle AND a maintained plant-based/vegetarian section for core buyers

Practical recommendation

The evidence supports a dual-placement model: stock a curated selection of familiar formats (mince, burgers, sausages) in or adjacent to the meat case, while maintaining a vegetarian/plant-based bay for core plant-based shoppers. Beyond Meat’s own SEC filings state that ‘proximity to the meat case has a material effect on its sales.’ Plant-based milk took off precisely when it moved from a specialty aisle into the refrigerated dairy section.

2.2 Execute price changes

Lead:  Merchandising |  Sourcing

Involved:  Data

Why this matters: Price remains the #1 barrier for flexitarian shoppers; addressing it directly drives trial, loyalty, and category growth. Plant-based products can be ‘two to four times more expensive pound for pound’ compared to conventional counterparts (GFI). Once you’ve diagnosed the price gaps (Phase 1.4), it’s time to act – closing those gaps through supplier partnerships, margin decisions, and targeted pilots.

Key steps:

- 1 Prioritize SKUs for price action.** Review your price gap diagnosis and select high-velocity items where:
 - The price gap is smallest (quick wins)
 - Volume potential is highest
 - You have private label control or strong supplier relationships
- 2 Engage suppliers.** For national brands, open conversations about cost reductions, promotional support, or co-investment in price parity tests.
- 3 Make margin decisions.** For private label, commit to matching conventional prices on select SKUs and absorbing margins temporarily as a growth investment. Set a clear timeframe and success metrics.
- 4 Launch price parity pilots.** Test price changes on 5-10 SKUs in select stores, banners, or online for a defined period (8-12 weeks) with clear success metrics.
- 5 Monitor and measure.** Track sales velocity, basket impact/impact on adjacent categories, and customer response through loyalty data.
- 6 Scale what works.** Use pilot data to build the case for broader rollout. Communicate wins internally and externally.

See it in action: Lidl Germany’s Vemondo Range

In October 2023, Lidl Germany introduced price parity on its private-label Vemondo plant-based range, matching prices with conventional animal products. Within six months, Vemondo sales increased by over 30%. The move also positioned Lidl as a market leader, prompting competitors like Aldi and Kaufland to follow suit.



‘Plant-based is 2-4x more expensive’

- Plant-based meat and seafood prices are up 13% over the past two years; conventional meat up only 4% (GFI 2025).
- Plant-based meat and dairy alternatives are ‘two to four times more expensive pound for pound’ compared to conventional counterparts (GFI).
- 28% of Kroger shoppers who cut back cited budget – up 12 points year-over-year (Kroger / 84.51 / Plant Based Foods Institute, 2024).

Key consideration

The price gap is real, but it is a lever retailers’ control. Private label, co-location in higher-traffic areas, promotional pricing, and own-brand development (like Lidl’s Vemondo) are all proven tools. Framing price as an ‘execution problem’ rather than an ‘inherent product problem’ is both accurate and actionable.

2.3 Launch strategic promotions

Lead:  Marketing

Involved:  Merchandising

Why this matters: Promotions drive trial. For shoppers who are curious but not committed, a well-timed offer can be the nudge that turns interest into first purchase. The goal isn't just short-term lifts, it's acquiring new, repeat buyers.

Key steps:

- 1 Map your promotional calendar.** Identify key moments when consumers are already thinking about food, for instance:
 - **January** – Veganuary (New Year intentions)
 - **May–August** – BBQ season (burgers, sausages, sides)
 - **Year-round** – Meatless Mondays (weekly rhythm)
- 2 Design the offer.** Determine what will drive trial for your target customer, for instance:
 - Temporary price parity on key items
 - Multi-buy deals (e.g., “2 for \$6”)
 - Bundle offers (plant-based burger + buns + sauce)
 - Loyalty points multipliers for plant-based purchases
- 3 Secure merchandising support.** Work with merchandising to secure endcap or high-traffic placement and ensure adequate stock levels to meet anticipated demand.
- 4 Activate across channels.** Promote the campaign where your customers will see it:
 - Digital flyers and website banners
 - Social media and email newsletters
 - In-store signage and sampling events
 - Loyalty app notifications
- 5 Measure and learn.** Track sales lift, new buyer acquisition, repeat purchase rate, and basket size impact. Use customer surveys to understand what drove trial and what would bring them back.

See it in action: Veganuary 57% sales lift with sustained impact¹⁷

A study of Veganuary campaigns found that plant-based product sales rose 57% **during the intervention** and remained **15% higher post-campaign**. The greatest increases were in superstores (+58%) and lower-affluence areas (+64%), proving that strategic promotions can reach new customer segments. Importantly, meat sales remained unchanged – growth was incremental, not cannibalistic.

VEGANUARY 

See it in action: Using loyalty programs to drive plant-based trial

Loyalty programs offer a powerful tool for encouraging plant-based purchases. In a 2026 interview, one Canadian retailer highlighted how rewarding customers with targeted points for choosing plant based can drive trial, generate valuable data, and enable smarter, more personalized offers over time.

2.4 Educate customers for repeat purchase

Lead:  Marketing

Involved:  Sustainability

Why this matters: Price and placement get customers to notice. Education gets them to buy and buy again. Consumer confusion around health, processing, taste, and preparation is a major barrier to trial and repeat purchase. Closing this knowledge gap is essential to scaling demand.

Key steps:

- 1 **Demystify health and perceptions about processing.** Use simple, clear messaging to address common misconceptions, such as:
 - “Plant-based protein doesn’t mean highly processed – think lentils, beans, and tofu.”
 - “Like dairy milk, plant-based milk is fortified with vitamins. It’s just made from plants.”
- 2 **Use trusted certifications.** Third-party certifications like VegeCert, Vegan Action, or PBFA Certified help consumers quickly identify products that meet credible standards.
- 3 **Make preparation simple.** Many consumers don’t know how to cook tofu, beans, or plant-based meats. Provide solutions like:
 - Recipe cards near products
 - QR codes linking to short cooking videos
 - In-store demos and tasting events
- 4 **Use trusted voices.** Partner with dietitians, chefs, and credible organizations to co-create science-backed content:
 - Retail dietitians can host in-store tours or Q&A sessions
 - NGOs like World Animal Protection can provide educational materials (including our new impact calculator) or collaborate on a special event
 - Social media influencers can demonstrate recipes and build familiarity
- 5 **Leverage in-store touchpoints.** Use shelf tags with icons (“High Protein,” “Climate Friendly,” “Quick Meal”), endcap displays with educational signage, and digital screens with rotating tips and recipes to meet customers where they shop. Encourage suppliers to host instore demos and tasting.
- 6 **Extend education online.** Ensure your digital channels reinforce in-store efforts:
 - Website filters/icons for “plant-based,” “high protein,” “quick meals”
 - Recipe collections and meal planning content
 - Social media campaigns addressing common myths
- 7 **Measure what resonates.** Track engagement with educational content and its impact on sales. Use surveys to understand if consumer perceptions are shifting.

See it in action: Pulse Canada supporting retail dietitians

Pulse Canada works directly with retailer dietitians, providing technical nutrition data and content for consumer education – from in-store materials to newsletters. This partnership model ensures information is credible, consistent, and trusted by shoppers.



See it in action: Daiya in-store demos with dietitians

Daiya partners with retail dietitians for in-store sampling and education. When a dietitian explains how the product fits into a healthy diet, not just that it tastes good, consumers are more likely to try and trust it.





See it in action: Building consumer trust through certification

In a 2020 FAIRR webinar on plant-based proteins, a Canadian retailer highlighted their use of **VegeCert** third-party certification for plant-based products. Their rationale: certification is “important for consumer trust.”



Ultra-Processed Food (UPF) concerns

- 54% of European consumers say concerns about plant-based burgers and sausages being ultra-processed deter them from buying (EIT Food Consumer Observatory, 9,800 respondents across 17 countries).
- 46% of consumers in a GlobalData survey said they are ‘extremely concerned’ about the processing required to make plant-based meat, dairy and seafood.
- 81% of US shoppers say purchasing clean-label food products is important to them (Acosta Group Clean Label Insights Study).
- 1 in 4 consumers worldwide says they are eliminating processed foods from their diet (Innova Market Insights, 2025).

Key consideration

The concern with Ultra-Processed Foods most affects processed meat alternatives (burgers, sausages, nuggets). It does NOT affect tofu, tempeh, lentils, pulses, or veg-led whole foods – all of which are growing. Retailers should position their plant-based strategy around the full spectrum: from minimally processed whole foods (tofu, edamame, legumes) to better-formulated alternatives (shorter ingredient lists, clean-label claims). This is also why veg-forward category expansion is more resilient than a pure meat-analog strategy.

For processed meat alternatives, consider framing them as an occasional convenience food choice—similar to a customer who wants to cut back on red meat but still enjoys an occasional steak. This normalizes the category, manages expectations, and doesn’t force shoppers into an all-or-nothing mindset.

Canada as a global plant protein production hub

This is a uniquely Canadian competitive advantage that a plant-based strategy can leverage:

- Canada is the world’s largest producer of dry peas and lentils, producing more than half of the world’s lentils (Statistics Canada).
- The Prairies have been called the world’s potential ‘protein basket’ – with 28+ million hectares of arable land (Agriculture Canada).
- The world’s largest pea protein processing facility is located in Portage la Prairie, Manitoba (Roquette).
- Canadian company Burcon NutraScience is a global technology leader in pea, fava, and canola protein innovation (TSX-listed, Vancouver, BC).
- Protein Industries Canada (federal Global Innovation Cluster) aims to grow Canada to 10% of global plant-based ingredient supply by 2035, contributing CAD \$25 billion and 17,000 jobs annually.

Strategic angle

Canadian retailers stocking domestically grown and processed plant-based proteins aren’t just meeting consumer demand – they’re supporting Canadian farmers, processors, and a federal industrial strategy. This is a ‘buy Canadian’ narrative that resonates with retailer brand values, supply chain resilience, and ESG goals simultaneously. **This is a story worth telling to increase product loyalty.**

B3. Phase 3: Lead – setting the pace



Objective:

Move from internal execution to external leadership by embedding plant-based growth into long-term business strategy, setting commitments, adopting credible measurement, and using your voice to shape the market.

Strategies ideal for retailers who:

- Have established foundational work and run successful strategies in Phase 2
- Are ready to make commitments that signal leadership
- Want to align plant-based growth with corporate ESG reporting
- Seek to influence suppliers, policymakers, and the broader industry

3.1 Set a SMART target

Lead:  Sustainability

Involved:  Merchandising |  Data |  Marketing |  Sourcing

Why this matters: A target turns intention into accountability. It gives your cross-functional team a clear goal to work toward and a way to measure success. Without a target, efforts remain scattered and progress is hard to demonstrate.

Key steps:

- 1 Review your baseline.** Confirm your current plant-based sales ratio (from Phase 1.2) and understand category-level performance.
- 2 Benchmark against leaders.** Look at what retailers like Lidl (20/80 by 2030) or Dutch retailers (60/40 by 2030) have committed to. Use this as context, not a copy-paste target.
- 3 Set a SMART goal.** Ensure your target is:
 - **Specific** – e.g., “Increase plant-based protein sales from 12% to 20% of total protein sales”
 - **Measurable** – Tied to your baseline methodology
 - **Achievable** – Realistic given your starting point and market context
 - **Relevant** – Connected to business goals (growth, ESG, customer demand)
 - **Time-bound** – Clear deadline (e.g., by 2030 or 2032)
- 4 Socialize internally.** Share the target with your cross-functional team and leadership. Build alignment on what it means and why it matters.
- 5 Decide on communication.** Determine whether and how to communicate the target – internally only, to suppliers, or publicly. This decision should align with your broader ESG reporting strategy and can support priorities such as:
 - GHG emissions reduction across supply chain (Scope 3).
 - Protect biodiversity by decreasing deforestation and habitat loss.
 - Support SDG 12 (Responsible Consumption) and SDG 13 (Climate Action).



See it in action: Lidl Germany's clear, public target

Lidl Germany committed to a 20/80 plant/animal protein split by 2030 – up from 11% in 2022. The target is specific, measurable, and time-bound. It's also public, signaling leadership and inviting accountability. Since announcing it, Lidl has reported annual progress, with plant-based protein reaching 11.8% in 2023.



See it in action: Tesco's ambitious growth target

In 2020, Tesco set a target to grow plant-based meat alternative sales by 300% by 2025. While they didn't hit that number (at 94% growth), the target drove action: expanded own-label ranges, supplier innovation, and a strategic pivot to veg-led whole foods when consumer preferences shifted.



3.2 Implement a credible measurement framework

Lead:  Sustainability

Involved:  Data

Why this matters: A target is only as credible as the data behind it. To track progress, benchmark against peers, and report with confidence, you need a consistent, reliable measurement framework. This moves you beyond basic sales tracking to a methodology that aligns with industry best practices.

Key steps:

- 1 **Review your current methodology.** Assess how you're currently measuring plant-based sales. Is it consistent month-to-month? Does it capture all relevant categories? Are you measuring by sales value, volume, or protein weight?
- 2 **Understand industry best practices.** Explore third party tools like the **Protein Tracker**, developed by the Green Protein Alliance and ProVeg Netherlands. It measures the plant/animal protein split using a standardized methodology, enabling credible benchmarking and transparent reporting.
- 3 **Identify gaps.** Compare your current approach to best practices. Are you missing key categories? Do you need ingredient-level analysis for composite products?
- 4 **Upgrade your framework.** Adopt a more robust methodology – one that can track progress consistently over time and support ESG reporting.
- 5 **Establish a reporting cadence.** Decide how often you'll measure and report progress (monthly for internal, annually for external). Build this into your data team's regular workflow.
- 6 **Benchmark where possible.** If peers or industry data is available, use it to understand your relative performance. This can inform target adjustments and strategy refinement.



See it in action: The Dutch protein tracker is national standard

Over **90% of the Dutch grocery market** now reports their protein split using the standardized Protein Tracker methodology. This tool, developed by the Green Protein Alliance and ProVeg Netherlands, measures plant-based vs. animal-based protein sales with third-party validation. The result? Transparent, comparable data that has created a "race to the top" among retailers, with the national plant-based protein share reaching **42% in 2024**.



See it in action: Lidl Germany's annual transparent reporting¹⁸

Lidl Germany publishes annual data on its plant/animal protein ratio using WWF methodology. In 2023, they reported plant-based protein at **11.8%** of total protein sales—up from 11.1% the previous year—and plant-based dairy at **6.6%**. This transparency builds credibility and keeps the company accountable to its 2030 target.

3.3 Engage your ecosystem to broaden impact

Lead:  Sustainability

Involved:  Marketing |  Merchandising |  Sourcing

Why this matters: Your plant-based strategy doesn't stop at the grocery aisle. Foodservice, suppliers, and industry partners all influence how customers experience and think about plant-based options. Engaging your full ecosystem amplifies your impact and builds momentum beyond your own banners.

Key steps:

- 1 Integrate foodservice.** Ensure plant-based options are visible, tasty, and competitively priced in your store cafes, salad bars, and ready-to-eat sections. Foodservice reinforces the message that plant-based is normal, convenient, and worth trying.
- 2 Work with suppliers on innovation.** Share your plant-based goals with key suppliers and invite them to co-develop new products that fill assortment gaps, improve taste and texture, or hit specific price points.
- 3 Partner with credible organizations.** Collaborate with dietitians, health organizations, and organizations like Pulse Canada or World Animal Protection to co-create educational content, host events, or develop tools.
- 4 Join industry initiatives.** Participate in broader efforts of a plant-based group or collective retailer commitments. There is power and safety in numbers – especially when it comes to influencing policy or supplier behaviour.
- 5 Engage with policymakers.** As you build leadership, consider lending your voice to conversations about sustainable food policy, innovation funding, or national dietary guidelines. Retailers who show up shape the future.
- 6 Share learnings across your organization.** Ensure that successes from one banner, region, or department are shared with others. Internal knowledge transfer accelerates progress across the business.

See it in action: The Dutch Collective Model; Power in Numbers

When all major Dutch retailers adopted the Protein Tracker and committed to a 60/40 plant/animal protein split, they created a “race to the top.” No single retailer feared losing customers by being too plant-forward – because everyone was moving together. The result? National plant-based protein share reached 42.2% in 2024.



See it in action: Carrefour's Supplier Coalition

Carrefour didn't go it alone. They formed a coalition with seven major manufacturers (Danone, Unilever, Bel, and others) committing to €3 billion in plant-based sales by 2026. Shared goals unlocked co-investment, innovation, and collective momentum.



3.4 Tell your story

Lead:  Marketing

Involved:  Sustainability

Why this matters: Leadership isn't just about what you do – it's about what you communicate. Sharing your plant-based journey builds brand trust, attracts conscious consumers, and positions you as a forward-thinking retailer. But in an era of greenwashing scrutiny (Bill C-59 – which requires companies to substantiate environmental claims with credible evidence), your story must be credible, transparent, and backed by data.

Key steps:

- 1 Know your audience.** Different stakeholders care about different things:
 - **Customers** want to know what's in it for them – taste, health, value, and ease.
 - **Investors** want to see ESG progress and risk management.
 - **Employees** want to feel proud of where they work.
 - **Suppliers** want to understand your direction so they can innovate with you.
 - **Governments** look for alignment with policy priorities – such as climate targets, public health outcomes, and economic resilience.
- 2 Craft your core narrative.** Develop simple, consistent messaging that ties together:
 - Why plant-based matters to your business (growth, customers, future-proofing)
 - What you're doing (assortment, pricing, partnerships)
 - How it's going (progress against targets, customer response)
- 3 Choose your channels.** Determine where and how you'll tell your story:
 - **External:** Annual ESG reports, website, social media, press releases, in-store signage
 - **Internal:** Team meetings, employee newsletters, training materials
- 4 Lead with credibility.** Ensure every claim is backed by data and evidence. This protects against greenwashing¹⁹ risk and builds trust.
- 5 Celebrate wins and be honest about challenges.** Share milestones (e.g., "We've increased plant-based sales by 25% since 2023") and lessons learned. Authenticity resonates more than perfection.
- 6 Equip your teams.** Give store staff, category managers, and customer service teams simple language to talk about your plant-based strategy. They're your most credible ambassadors.

See it in action: Canadian retailer's "Our Part" website

A Canadian retailer uses its "Our Part" website to communicate sustainability efforts, including plant-based initiatives. The site covers responsible sourcing, environmental stewardship, and healthy products – giving customers a clear window into the company's values and actions.

OurPart™

Part C: Tools & resources

C1. Implementation checklist

Use this checklist to track your progress through the three phases. Not every tactic will be right for every retailer – choose what fits your context and capacity.



Phase 1

1. Identify internal champion and map stakeholders
2. Schedule cross-functional kick-off meeting
3. Define roles and accountability across teams
4. Calculate your plant-based sales baseline (by category)
5. Document methodology for consistent tracking
6. Conduct assortment gap analysis (use table in 1.3)
7. Review private label opportunities
8. Map price gaps across key categories (private label vs. conventional, national brands vs. competitors)
9. Socialize findings with cross-functional team

Phase 2

1. Map current placement by category
2. Identify placement pilot opportunities (integrated vs. dedicated)
3. Select 5-10 SKUs for price action
4. Engage suppliers on cost reductions or promotional support
5. Make margin decisions on private label
6. Launch price or placement pilots in select stores
7. Map promotional calendar (Veganuary, BBQ, Back-to-School)
8. Design and launch first campaign
9. Deploy in-store education (shelf tags, QR codes, signage)
10. Partner with dietitians for demos or content
11. Record learnings from pilots

Phase 3

1. Review baseline and benchmark against leaders
2. Set a SMART target (Specific, Measurable, Achievable, Relevant, Time-bound)
3. Decide on internal vs. external communication
4. Review current measurement methodology
5. Explore tools like the Protein Tracker
6. Upgrade measurement framework if needed
7. Engage foodservice team on plant-based options
8. Share goals with key suppliers
9. Explore partnerships with credible organizations
10. Develop core narrative for different audiences
11. Communicate progress internally and externally

C2. Case study library

Lidl Germany: The power of price parity + integrated placement



The challenge

In 2022, Lidl Germany recognized that plant-based products were still seen as a niche—often more expensive than conventional options and hidden in separate sections. This limited their appeal to the growing flexitarian group.

The driver

Lidl’s plant-based strategy is rooted in aligning its product range with the Planetary Health Diet, making it easier for customers to adopt healthier, more environmentally conscious eating habits. Working with WWF, Lidl recognizes that food choices have a major impact on climate and nature—and that shifting toward plant-based proteins is a key lever for operating within planetary limits. The approach also responds to changing consumer preferences, particularly among younger shoppers.

The strategy

Lidl committed to a **20/80 plant/animal protein split by 2030** and launched a multi-pronged strategy:

Tactic	Action
Price parity	In October 2023, Lidl introduced price parity on its private-label Vemondo range, matching prices with conventional animal products. This wasn't a temporary promotion—it was a permanent structural change.
Integrated placement	Plant-based products were moved next to meat and dairy in all 3,250+ stores. No separate “vegan” section. No hiding in the free-from aisle.
Own-brand expansion	The Vemondo range grew to over 650 products, giving customers choice across categories.
Transparent reporting	Lidl began publishing annual data on its plant/animal protein ratio using WWF methodology.

The results

- Vemondo sales increased by over 30% within six months of introducing price parity.
- Plant-based protein share reached 11.8% in 2023, up from 11.1% the previous year.
- The move positioned Lidl as a market leader, prompting competitors like Aldi and Kaufland to follow suit.

Key takeaways for Canadian retailers

- Price parity removes the #1 barrier for flexitarians—and drives significant sales growth.
- Integrated placement signals that plant-based is normal, not niche.
- Private label gives you more control over pricing and margins.
- Public targets create accountability and build brand leadership.

The Dutch collective model: A “race to the top”



The challenge

Individual retailer action on plant-based felt risky—would consumers punish the first mover? Without standardized measurement, progress was hard to track and compare.

The driver

Dutch retailers have been motivated by a combination of external pressure (advocacy groups like Wakker Dier campaigning against retailers without protein strategies), national policy direction (emphasizing plant-based diets for climate goals), and system-level constraints (competition for land use between food production, biodiversity, renewable energy, and emissions reduction). Plant-based foods are positioned as part of a practical solution to support environmental goals, improve health outcomes, and build a more resilient food system.

The strategy

All seven major Dutch retailers (controlling over **90% of the market**) jointly committed to a **60/40 plant/animal protein split by 2030**. Key elements:

Element	Action
Collective commitment	Retailers moved together—no single company feared losing customers by being “too plant-forward.”
Standardized measurement	The Protein Tracker tool was developed by the Green Protein Alliance and ProVeg Netherlands to measure protein splits consistently across the sector.
Transparent reporting	Retailers report progress annually, enabling benchmarking and healthy competition.
Supplier signal	The collective commitment sent a clear message to suppliers: plant-based innovation is a priority.

The results

- National plant-based protein share reached 42.2% in 2024.
- Over 90% of Dutch grocery sales are now tracked using the Protein Tracker methodology.
- Retailers are competing on progress, not just promises—a true “race to the top.”
- Some retailers have gone further: Jumbo stopped meat promotions altogether; Lidl tests integrated placement.

Key takeaways for Canadian retailers

- Collective action de-risks individual moves—there’s safety and power in numbers.
- Standardized measurement enables credible benchmarking and transparency.
- A shared goal creates momentum across the entire sector, not just within one company.

Tesco UK: Evolving with the consumer



The challenge

Tesco was an early mover in plant-based strategies, launching innovative own-label ranges like Wicked Kitchen and affordable options like Plant Chef. But as consumer preferences shifted away from processed meat alternatives, Tesco needed to adapt.

The driver

Tesco’s motivation is grounded in supporting healthy and sustainable diets for both people and the planet. Over three-quarters of their customers look to supermarkets to help them eat more healthily. As part of a broader sustainability agenda aligned with the UN SDGs and developed with WWF, Tesco set plant-based sales targets to help halve the environmental impact of the average shopping basket.

The strategy

Phase	Action
2018–2020	Set ambitious target: grow plant-based meat alternative sales by 300% by 2025 (vs. 2018 baseline). Launched Wicked Kitchen and Plant Chef ranges.
2021–2023	Sales peaked at 130% growth , then slowed as consumer interest shifted toward whole foods.
2024–Present	Pivoted strategy to include “ veg-led ” whole foods —lentils, beans, chickpeas, tofu, tempeh—alongside processed alternatives.

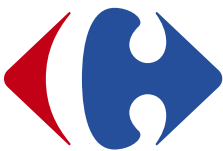
The results

- Plant-based meat alternatives grew 94% from 2018 baseline (short of the 300% target, but still significant).
- Veg-led whole foods now represent 40% of all plant-based sales—an extra 600,000 dishes sold in 2024.
- Tofu and tempeh saw double-digit growth, with plant-based mince up nearly 25%.
- Dairy alternatives share expanded from 5% to 7%.

Key takeaways for Canadian retailers

- Targets drive action—even if you don’t fully achieve them. Tesco’s target spurred innovation, supplier engagement, and learning.
- Stay close to consumer preferences. When shoppers shift, your assortment should shift with them.
- A diversified plant-based strategy (processed + whole foods) captures more customers and adapts to changing tastes.

Carrefour: The coalition builder



The challenge

Carrefour recognized that consumer demand for plant-based options was growing rapidly, but progress was too slow. Between 2015 and 2023, the share of French households with at least one flexitarian nearly doubled from 25% to 45%. Yet plant-based alternatives remained a fragmented category, with no unified industry approach to scale innovation, affordability, or consumer awareness.

The driver

Carrefour's motivation is driven by three converging factors: surging consumer demand for plant proteins, inflationary pressures making affordable meals a priority, and climate goals requiring reductions in dietary carbon footprints. Food accounts for nearly a quarter of France's carbon footprint. As part of its Carrefour 2026 plan, the company committed to reducing indirect CO₂ emissions (Scope 3) by 29% by 2030—with plant-based sales playing a significant role.

The strategy

Tactic	Action
Set a sales target	€500 million in plant-based sales by 2026 (a 65% increase from 2022).
Formed a coalition	Teamed up with seven major manufacturers: Danone, Unilever, Bel, Andros, Bonduelle, Nutrition & Santé, Savencia.
Collective commitment	Coalition partners committed to €3 billion in plant-based sales by 2026.
Joint initiatives	Introduce new products, test taste innovations, organize sales drives, share recipes, and discuss best practices.
Steering committee	Regular meetings to track results and decide collective campaigns.

The results

- Carrefour set a target of €500 million in plant-based sales by 2026 (65% increase from 2022).
- Coalition partners collectively committed to €3 billion in plant-based sales by 2026.
- Carrefour committed to reducing indirect CO₂ emissions (Scope 3) by 29% by 2030, with plant-based playing a significant role.
- Between 2015 and 2023, the share of French households with at least one flexitarian nearly doubled from 25% to 45%.

Key takeaways for Canadian retailers

- Préparé avec le soutien des consultants de Reeve and Green Chain
- Build coalitions to multiply impact beyond what any one retailer could achieve alone.
- Collective commitments drive investment, innovation, and consumer awareness across the entire supply chain.
- Regular collaboration through steering committees keeps partners aligned and coordinated.
- Consumer demand is the tailwind – and Canadian trends in health, cost, and climate are aligned.

Veganuary campaigns: Low-risk, high-impact promotions

The challenge

How do you drive trial among consumers who are curious but not committed? How do you test plant-based tactics without major investment?



The strategy

A multi-retailer study examined the impact of Veganuary campaigns featuring:

Tactic	Action
Increased visibility	Eye-level placement, endcaps, aisle ends
Promotional signage	Shelf tags, posters, digital screens
Price promotions	Temporary price parity, discounts on branded items
Recipe ideas	Meal inspiration, simple swaps
Targeted approach	Greater emphasis in superstores and lower-affluence areas

The results

- Plant-based product sales rose **57% during the intervention**.
- Sales remained **15% higher post-campaign** – indicating new customer acquisition, not just short-term shifting.
- Greatest increases in superstores (+58%) and lower-affluence areas (+64%).
- **Meat sales remained unchanged** – growth was incremental, not cannibalistic.

Key takeaways for Canadian retailers

- Cross-functional alignment is essential—merchandising, marketing, and operations must work together.
- Placement next to conventional counterparts drives substitution.
- Simple, positive education works better than moralizing.
- Employees are powerful ambassadors when trained.

Vancouver Humane Society: Cross-functional success (cage-free eggs)



The challenge

In 2011, Vancouver Humane Society wanted to increase cage-free egg sales at Overwaitea/Save-On-Foods without changing prices or alienating conventional egg buyers.

Note: While this example focuses on cage-free eggs, the lessons apply directly to plant-based foods.

The strategy

Tactic	Action
Cross-functional alignment	Brought together merchandising (placement), marketing (signage), and operations (employee training).
Strategic placement	Cage-free eggs placed next to conventional eggs—making them an easy swap, not a separate choice.
Clear signage	In-store decals and positive packaging language educated shoppers without judgment.
Employee training	Staff understood the attributes of cage-free eggs and could answer customer questions.
In-store education	Brought farmers into the store to do presentations.
Key messaging	Integrated animal welfare, health, and value—not just ethics.

The results

- Cage-free egg sales jumped to **40%**.
- Achieved without raising prices or cannibalizing conventional egg sales.
- Demonstrated that clear communication and strategic placement can shift consumer behaviour.

Key takeaways for plant-based

- Cross-functional alignment is essential—merchandising, marketing, and operations must work together.
- Placement next to conventional counterparts drives substitution.
- Simple, positive education works better than moralizing.
- Employees are powerful ambassadors when trained.

C3. Partner directory

These organizations can support your plant-based strategy with credible content, technical expertise, and consumer education tools.

Organization	Area of expertise	How they can help	Contacts
 Pulse Canada	Pulses (lentils, peas, beans, chickpeas)	Technical nutrition data, dietitian support, consumer content, Canadian sourcing connections	Website: pulsecanada.com Email: info@pulsecanada.com
 Protein Industries Canada (PIC)	Plant-based innovation, Canadian manufacturers	Supplier connections, innovation funding, market intelligence	Website: proteinindustriescanada.ca Contact: info@proteinsupercluster.ca
 Retail Council of Canada (RCC)	Industry coordination, retailer network	Peer connections, industry events, collective initiatives	Website: retailcouncil.org Email: info@retailcouncil.org
 Plant Based Foods of Canada	Plant-based sector coordination	Industry data, manufacturer connections, networking	Website: plantbasedfoodscanada.ca Contact: leslieewing@plantbasedfoodscanada.ca
 Plant Based Canada	Plant-based sector coordination	Science-based organization focused on health and nutrition	Website: plantbasedcanada.org Contact: plantbasedcanadaorg@gmail.com
Local public health units	Regional health promotion	Co-branded education campaigns, community outreach	Varies by region Search online: "[Your city/region] public health unit"
 World Animal Protection	Animal welfare, food systems transformation, policy alignment	Consumer education on welfare & environment, global best practices	Website: worldanimalprotection.ca Email: info@worldanimalprotection.ca

Conclusion & call to action

The evidence is clear: plant-based isn't a niche category anymore – it's a growth opportunity. Global retailers are proving that strategic action drives sales, builds customer loyalty, and delivers measurable progress toward climate goals. Canadian retailers have the same levers at their disposal: pricing, placement, promotions and education.



Your first three steps

You don't need to do everything at once. Start here:

- 1 Form your cross-functional team.** Identify your senior executive champion and schedule a kick-off meeting with merchandising, marketing, sourcing, and sustainability.
- 2 Calculate your baseline.** Run the numbers on your current plant-based sales ratio across key categories. Know where you stand.
- 3 Run a pilot.** Choose one high-impact tactic – price parity on five own-brand SKUs, integrated placement in a test market, or a Veganuary promotion – and measure the results.

Then keep going!

Use your pilot results to build the case for scaling. Layer on additional tactics. When you're ready, set a target and tell your story.

How World Animal Protection can help

World Animal Protection is a partner in your plant-based journey. By engaging actors across the value chain, from farmers to investors, and being a member of the National Farm Animal Care Council, alongside our consultative status with the United Nations, we bring the credibility and practical expertise needed to drive meaningful progress.

What we offer

1 Strategic convening & industry connections: We bring the right people together. Through our extensive network we can introduce you to peers who've successfully piloted price parity, connect you with innovative suppliers, and facilitate peer learning across the sector. If you're looking for the right contact, we likely have them.

2 Credible, actionable research & consumer insights: This playbook is just the start. We continuously track global best practices and translate them into the Canadian context. When you need evidence to make the case internally or externally, we can point you to credible data and examples. We can also explore opportunities to gather consumer insights, helping you better understand what shoppers want, what may be holding them back and which messages resonate, so you can make more informed, customer-focused decisions.

3 Implementation support: Not sure where to start? We can help:

- Present to your colleagues and/or potential internal champion on the need and benefits of a plant-based strategy.
- Design and measure low-risk pilots (placement tests, price parity trials, seasonal campaigns or education campaigns).
- Co-create educational content with dietitians and trusted partners
- Develop messaging that resonates with consumers while navigating greenwashing regulations (Bill C-59).
- Track progress and tell your story credibly.

4 Consumer engagement tools: We're developing tools to help you connect with customers in new ways, starting with our Impact Calculator (see below). These tools translate abstract environmental benefits into tangible, personal impact, making sustainability visible and motivating action.

5 A long-term partner: We're not here for a one-off guide. We're here to support your journey over time – celebrating wins, troubleshooting challenges, and evolving our resources as the market changes.





Impact calculator

World Animal Protection has developed an impact calculator to help consumers understand the environmental impacts of their food choices.



Interested?

Get in touch with us to learn more.

What it does:

- Translates plant-based consumption into tangible environmental impacts (e.g., CO₂ saved, water conserved, land preserved)
- Makes sustainable food choices personal and interactive
- Simple, engaging, and credible

How retailers can use it:

- Integrate into loyalty apps or websites
- Link via QR codes on shelf tags
- Feature in email newsletters or social campaigns
- Use in in-store education (digital screens, recipe cards)

Why it matters:

Consumer surveys consistently show a knowledge gap around the environmental impact of food choices. The impact calculator closes that gap, making it easy for shoppers to understand and act on their values.



We're here to help

World Animal Protection developed this playbook as a resource – but we're also a partner. Whether you're just starting your plant-based journey or ready to set public targets, whether you need consumer survey data, industry connections, or support designing a pilot, we'd welcome the chance to explore how we can help.

World Animal Protection Contact:

Lynn Kavanagh

Farming Campaign Manager

lynkavanagh@worldanimalprotection.ca

Ester Mora

Corporate Campaign Manager

estermora@worldanimalprotection.ca

References

- ¹ MarketDataForecast, "Plant-Based Protein Market Size, Share & Trends, 2033," MarketDataForecast, <https://www.marketdataforecast.com/market-reports/plant-based-protein-market>.
- ² Schwarz Group, "Price Parity and Protein Strategy at the Companies of Schwarz Group," Schwarz Group, <https://gruppe.schwarz/en/content/story-price-parity-and-protein-strategy>.
- ³ Good Food Institute Europe, "The State of Plant-Based in the Netherlands: Retail Sales Decline Despite Consumer Openness and Foodservice Growth," GFI Europe, June 11, 2025, <https://gfi-europe.org/press/the-state-of-plant-based-in-the-netherlands-retail-sales-decline-despite-consumer-openness-and-foodservice-growth/>.
- ⁴ Tesco, Tesco PLC Sustainability Report 2024/25, cited in "Veg Taking Centre Stage in Meat-Alternative Meals, Says Tesco," Fruitnet, November 28, 2024, <https://www.fruitnet.com/fresh-produce-journal/veg-taking-centre-stage-in-meat-alternative-meals-says-tesco/263902.article>.
- ⁵ Innova Market Insights, "Consumer Plant-Based Trends in Canada," Innova Market Insights, <https://www.innovamarketinsights.com/trends/consumer-plant-based-trends-in-canada/>.
- ⁶ Sylvain Charlebois, "Canada's Protein Future Is Flexible, Not Plant-Based," Retail Insider, May 13, 2025, <https://retail-insider.com/retail-insider/2025/05/canadas-protein-future-is-flexible-not-plant-based/>. Data sourced from the Canadian Food Sentiment Index, Spring 2025, Agri-Food Analytics Lab, Dalhousie University.
- ⁷ Ibid.
- ⁸ Mordor Intelligence, "Canada Dairy Alternatives Market Size & Share Analysis," Mordor Intelligence, accessed April 19, 2026, <https://www.mordorintelligence.com/industry-reports/canada-dairy-alternatives-market>.
- ⁹ IMARC Group, "Canada Plant-Based Protein Market Size & Forecast to 2033," IMARC Group, accessed April 19, 2026, <https://www.imarcgroup.com/canada-plant-based-protein-market>.
- ¹⁰ Plant Based Foods Institute, Kroger, and 84.51°, *Plant-Based Consumer Journey: Migration Analysis – Year 4*, October 2024, <https://members.plantbasedfoods.org/checkout/pbfa-i-migration-analysis-year-4-oct-2024>.
- ¹¹ MarketDataForecast, "Plant-Based Protein Market Size, Share & Trends, 2033," MarketDataForecast, <https://www.marketdataforecast.com/market-reports/plant-based-protein-market>.
- ¹² Albert Heijn, Aldi, Crisp, Dirk, Ekomplaza, Jumbo, Lidl, Plus, Odin, SPAR, and Picnic
- ¹³ Ben Stevenson, "Plant-Based Diet-Shift Initiative Case Studies: German Retailer Transitions," Rethink Priorities, September 2024, <https://rethinkpriorities.org/research-area/plant-based-diet-shift-initiative-case-studies-german-retailer-transitions/>.
- ¹⁴ Hannah Ritchie, "Less Meat Is Nearly Always Better Than Sustainable Meat, to Reduce Your Carbon Footprint," *Our World in Data*, February 4, 2020, <https://ourworldindata.org/less-meat-or-sustainable-meat>.
- ¹⁵ Food and Agriculture Organization of the United Nations, "Food Systems Account for More Than One Third of Global Greenhouse Gas Emissions," FAO, March 9, 2021, <https://www.fao.org/newsroom/detail/Food-systems-account-for-more-than-one-third-of-global-greenhouse-gas-emissions/en>.
- ¹⁶ Plant Based Foods Association and The Kroger Co., "PBFA & Kroger Store Test," Plant Based Foods Association, July 2020, <https://plantbasedfoods.org/pbfa-kroger-plant-based-meat-store-test>.
- ¹⁷ Joanna Trewern, Jonathan Chenoweth, Ian Christie, and Sarah Halevy, "Does Promoting Plant-Based Products in Veganuary Lead to Increased Sales, and a Reduction in Meat Sales? A Natural Experiment in a Supermarket Setting," *Public Health Nutrition* 25, no. 11 (November 2022): 3204–3214, <https://doi.org/10.1017/S1368980022001914>.
- ¹⁸ Ben Stevenson, "Plant-Based Diet-Shift Initiative Case Studies: German Retailer Transitions," Rethink Priorities, September 2024, <https://rethinkpriorities.org/research-area/plant-based-diet-shift-initiative-case-studies-german-retailer-transitions/>.
- ¹⁹ **Navigating Bill C-59: Credible Claims Matter:** With Canada's new greenwashing legislation, retailers must ensure environmental claims are backed by adequate and obvious substantiation. Multiple retailers interviewed for this guide noted that legal teams are now deeply involved in reviewing marketing materials.

We are World Animal Protection.

We end the needless suffering of animals.

We influence decision makers to put animals on the global agenda.

We help the world see how important animals are to all of us.

We inspire people to change animals' lives for the better.

We move the world to protect animals.

Contact us

World Animal Protection

90 Eglinton Avenue East, Suite 960
Toronto, ON M4P 2Y3

T: 416 369 0044 TF: 1 800 363 9772

F: 416 369 0147

E: info@worldanimalprotection.ca

► worldanimalprotection.ca



[/WorldAnimalProtectionCanada](https://www.facebook.com/WorldAnimalProtectionCanada)



[/AnimalProtectionCA](https://www.youtube.com/AnimalProtectionCA)