

UNLOCKING COMMERCIAL GROWTH FOR BEANS



**BANG IN SOME
BEANS**

 The Food
Foundation

VEGPOWER

 Planetary
Alliance

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What is the playbook for?

This playbook is a commercial guide, built on insight from a retail audit and a curated industry workshop bringing together senior leaders from UK retail, brands and manufacturing. It translates that insight into a set of commercially grounded growth levers, and a practical action list that businesses can use now. It's designed to be useful in driving forward the business case for investment in beans, for ranging conversations, NPD briefings, and category reviews.



What you'll get from this playbook

- A route to getting commercial teams excited about opportunities for beans
- Solutions to move forward in growing the bean category
- Guidance on effective levers for growth across product, place, price and promotion

Businesses currently backing beans

Bang In Some Beans Keen Bean Pledgers to date



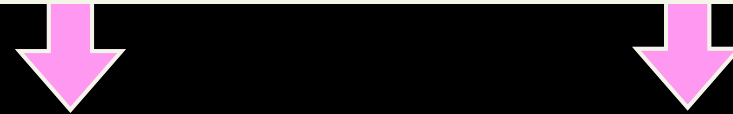
Keen Bean Promoters



What success looks like

Aim: Double UK bean consumption

On average Brits eat just one portion of beans a week, and 66% eat less than one portion a week.



Route 1 Health by stealth

What: Get beans into top selling meals and accompaniments by stealth*

How: NPD teams have a target to include beans by stealth in products, manufacturers always try to add beans to briefs

Who: NPD, technical, commercial and buying teams

*allergen permitting

Route 2 Bean obvious

What: Get people actively choosing beans

How: Beans framed as savvy and exciting, store layout encourages entry point through meal occasions, pricing, cross category promotions and merchandising

Who: Influencers, NPD, Buying, Commercial, and Marketing teams



SECTION 1

Beans are under activated

Beans are growing, but the commercial opportunity is greater.

Why beans, why now



Beans are under activated



Beans are low cost and can grow against a background of increasing food prices and living costs. They also offer high margins to retailers stocking and selling more of them (IGD, 2016). Consumer appetite for beans exists, market trends are moving beans to growth, and the Bang in Some Beans campaign is creating momentum through industry commitments and social media. What is missing is deliberate commercial action to turn that momentum into sustained category growth over the long term.

Current Category Reality

Structural barriers are in place. Beans are over-concentrated in a small number of formats, dominated by baked beans and hummus, with chilled and frozen formats significantly less developed. Tier architecture is weak and brands dominate the premium tier. In-store, beans are often invisible, placed in a low-footfall aisle with low inspiration, inconsistent messaging, and few nudges at the point of purchase.

As well as structural barriers, there is a narrative issue as beans have no coherent, consistent and aspirational messaging used sector-wide to generate excitement.

Where Growth Sits

01 Frequency. Growth comes from expanding the occasions on which beans appear, from scratch-cooked evening meals into breakfast, lunch, snacking and on-the-go, and introducing tier architecture that gives existing buyers a reason to trade up.

02 Penetration. Growth comes from moving beans out of the tinned veg aisle and into high-footfall missions, activating loyalty and retail media to reach occasional buyers directly, and letting brands lead aspiration while own-label captures the volume that follows.

03 Weight of purchase. Growing through stealth inclusion in high-volume formats like ready meals, sauces, meal kits and through stock-up mechanics that increase the quantity of beans in the household, building habit through availability.

Nailing the basics

Product:

- Convenience-led format innovation is the primary growth vehicle.
- NPD process reform, making beans a default consideration at concept stage, not an afterthought, is the upstream lever that changes the pipeline over the medium term.
- Frozen opportunity: low risk, cost and waste saving, price savvy.

Place:

- Secondary space (end-of-aisle, cross-category merchandising and near-basket placements) put beans in front of shoppers at the moment they are most likely to add to their basket.
- In-store inspiration: aspirational, effective nudges at the point of purchase closes the gap between online content discovery and in-store conversion.

Price:

- Focus on retail own brand premium beans offer.
- Make a clear trade-up path and use value language that positions the purchase as smart rather than reluctant to engage with cost saving consumers.

Promotion:

- Loyalty scheme activation, retail media, calendar moment hooks, and influencer-led demand seeding are all underused and activatable in the short term.
- Promotional mechanics build momentum and structural change sustains it.

Beans are growing, but the commercial opportunity is greater

Beans are low cost ingredients that can see growth against a background of increasing food prices and living costs, but they also offer high margins to retailers (IGD, 2016). Consumer desire exists, the macro trends are aligned, and the Bang in Some Beans campaign is creating momentum through industry commitments and social media. What is missing is deliberate commercial action to turn that momentum into category development that sustains growth over the long term.

The Commercial Pitfalls

01 | Beans are over-concentrated in limited formats (baked beans, peas and hummus)

02 | Beans have weak tiering architecture

03 | Own-label is underdeveloped in premium tiers despite clear opportunity

04 | There is underrepresentation in high-frequency categories and missions

05 | There is no consistent in-store language, inspiration or visibility



Where Value Is Being Left on the Table

The premium tier is under-claimed.

Brands are capturing value at the top tier but own-label is largely absent from it. The opportunity to build a premium own-label bean range, is real, near-term, and largely uncontested. M&S has already moved and others will likely follow.

High-frequency missions are underserved.

Breakfast, lunch, snacking, and on-the-go are all occasions where beans have a credible role but minimal current presence. The food-to-go channel is strong and health is proving sticky within it, which can be seen with boiled egg as the top-selling snack in the Tesco meal deal for two years running. Beans have an entry point here that has not been activated.

Retailer loyalty and media platforms are underutilised.

Clubcard, Nectar and equivalent programmes represent a precision targeting opportunity by reaching new customers, occasional buyers, incentivising trial, and building frequency.

In-store inspiration is absent at the moment it matters most.

The content ecosystem around beans online is rich and growing. At the fixture, there is little to no nudges, occasion suggestions, and recipe prompts. Online discovery is not converting to in-store action because the in-store environment is not designed to optimise it.

Why Beans, Why Now



01

Consumer interest in health is providing tailwinds as beans are rich in fibre, protein and are non-HFSS and non-UPF.

02

Grocery volatility is creating an opportunity for affordable, resilient products like beans.

03

There is a lack of tiering, which provides a margin opportunity.

04

Convenience formats are the growth frontier. Own label, chilled formats and frozen formats are especially underutilised.

05

Cultural momentum exists; but in-store reality has not yet caught up.

The conditions for bean category growth have never been better aligned, but success requires deliberate commercial action.

Consumer demand is shifting toward fibre-rich, protein-dense, non-UPF foods.

Sales of branded canned pulses have grown **19.4% YoY**, outpacing canned vegetables which are at just 1.8% YoY (IRI Northstar, 26 weeks to 14 June 2025 vs YA; with thanks to Bold Bean).

Beans sit at the intersection of every major trend shaping grocery right now: health, affordability, clean label, and cultural relevance. Beans are simple, cheap and trusted, the challenge is making them aspirational, delicious, and savvy.

Cultural momentum is happening.

Premium brands are proving the desire for beans exists. The task now is to catch what is already in the air and turn it into structural category growth.

Inspiration is absent at the point of purchase.

The category's in-store architecture, which is concentrated in a low-footfall tinned veg aisle, with limited tiering and inconsistent messaging, is working against growth.



1 in 4 households say health is their number one priority for the year ahead (NIQ, Feb 2026)



Protein (+9.6%) and fibre (+14.1%) foods saw growth in last 6 months, ahead of total FMCG growth (NIQ, Feb 2026)



Dried Pulse Volumes Up 6% YoY (Worldpanel, Feb 2026)

Trends are setting beans up for growth



Health is here to stay

Consumer demand is shifting toward fibre, protein-rich, clean label, and GLP1 friendly options.



Cost of Living

Consumers are looking for savvy ways to eat well and cost effectively.



Social Media Trends

Social media and influencers have an impact on consumer demand.



Policy Intervention

Mandatory reporting of healthy sales is in the pipeline and businesses should act now.

SECTION 2

Lay of the land: retail audit



Lay of the Land: Retail Audit

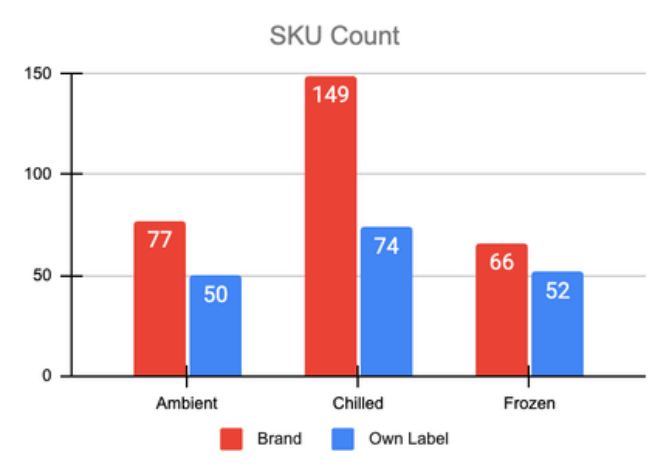
467 bean products found across the store	54% of bean products are branded
50% of beans were concentrated in ambient	35% of chilled bean products were in dips and plant-based
£/kg on products ranges from £0.67 up to £19.44/kg	9 gaps in high traffic subcategories where beans could exist but don't

One of the big 4 retailers with significant retail share was audited through their online platform. We looked at where beans appeared in products across chilled, ambient and frozen categories. We believe this is indicative of the wider retail market and therefore the subsequent analysis reflects marketplace norms.

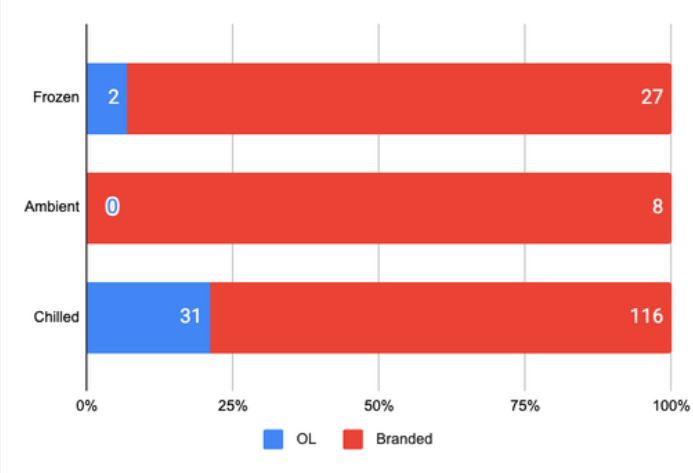
Key findings:

- 467 products with beans (including beans, peas, lentils or isolates made from these).
- ‘Whole bean’ products were heavily concentrated in the ambient category.
- Protein isolate formats were concentrated in the vegan and vegetarian subcategory within chilled and frozen.
- Beans are often underrepresented in high-traffic, high-frequency categories.
- Brands are dominating own label, especially in premium products.
- Own label lacks a clear tier architecture, limiting its ability to drive frequency, trade-up and occasion expansion.

Ambient Gaps	Chilled Gaps	Frozen Gaps
Sauces	Deli Counter	Free From
Instant Hot Snacks	Pizza	Pizza
Chutneys	Sandwich Fillers	
	Fresh Pasta	

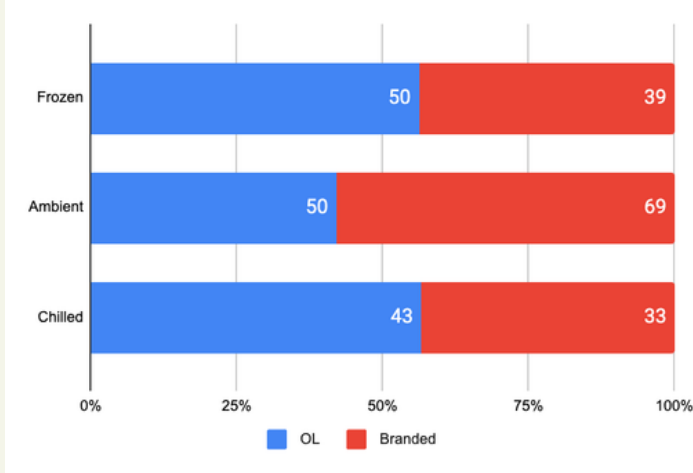


184 Products >£10/kg



Brands are dominating the high value product areas.

283 Products <£10/kg



Own Label is more dominant in the lower value commoditised lines.

The structural inefficiencies are clear

Format concentration. Baked beans, peas, and hummus dominate. Chilled and frozen formats are significantly underdeveloped, presenting scope for opportunity. 9 sub-category gaps were found in the retail audit where no beans were present. The opportunity in ready meals, chilled prepared, frozen and food-to-go is largely untapped.

Branded products account for 54% of SKUs. Brands are doing the work of driving aspiration and penetration. Own-label is delivering volume in ambient but has not yet built into the premium tier, despite clear evidence from Bold Bean Co. and M&S's own jarred range, that consumers will trade up.

Weak tiering architecture. Across the retail portfolio alone, price/kilogram ranges from £0.67 to £19.44 with no coherent consumer logic. The tinned tomatoes category shows a clear Good, Better, Best own-label structure and what disciplined tiering delivers for both volume and margin. But beans are not there yet.

Structural invisibility. Beans are not currently an exciting destination in most stores. There is no consistent in-store language; no moment of inspiration; no nudge at point of purchase. Online, the social media content around beans is rich, but in-store, it is almost entirely absent.

Inconsistent messaging. Terms like 'vegetarian', 'plant-based' and 'vegan' underperform with mainstream shoppers. Price language activates negative connotations. The category lacks a common commercial lexicon and without one, every business is starting from scratch (see Section 5).

What does this mean?

The premium proof points are in market. But the category is under-ranged in the formats consumers want, under-tiered across the price architecture, under-inspired at the point of purchase, and under-activated across the loyalty and media tools available to retailers.

Optimisation of these interconnected factors unlocks margin, not just volume.



SECTION 3

Consumer and business barriers and solutions
The central commercial tensions



What is stopping shoppers buying more beans?

Barriers

Convenience is the decisive trade-off.

The perception of beans as an evening meal, scratch-cooking-only ingredient remains stubbornly persistent, and is slowing commercial growth.

Beans are compartmentalised into narrow occasions and lack excitement.

Most consumers use one or two varieties, in one or two dishes, at one time of day, limiting both frequency and audience. The versatility of beans is the category's biggest opportunity and its most underused asset. For the occasional buyer (37%) beans are functional rather than exciting and there is low emotional connection. This aspiration deficit is a significant barrier to penetration growth.

Family friction blocks purchase for a significant shopper segment.

For family shoppers, the dominant question is not health or cost, it's "will the kids eat it, and will it be stressful?". This is a powerful veto and operates before any other consideration, it is not addressed by fibre messaging or sustainability credentials.

Beans have a narrative issue.

1. Many consumers do not know beans count as one of their five-a-day. This is an educational barrier to a concept consumers are on board with.
2. Dried and canned beans are understood as cheap. The word 'cheap' holds associations with compromise and low quality. Consumers do not want to feel they are feeding their family budget meals.

Solutions

Work with the consumer's habits and routines.

Prioritise format investment in chilled prepared, meals-to-go, pouches, and ready-to-use ambient formats. The product must work with the consumer's routine, this removes the need for consumer behaviour or attitude shift.

Occasion expansion is a growth lever.

Breakfast (outside of baked beans), lunch, snacking, and on-the-go are all underdeveloped bean occasions. Each category needs its own occasion strategy, products and placements should be designed to fit into current consumer habits. Food cultures across the world have beans deeply integrated, so leaning into this provides aspiration and cultural relevance. Premium formats and influencer-led content are doing this work at the top of the market, so the opportunity is to bring it to the mainstream.

Stealth inclusion removes friction and decision.

Blending beans into pasta sauce, hiding them in a burger patty, putting them into a ready meal removes the friction and decision. For overt bean products targeting families, taste testing and simple preparation are the relevant proof points. Parental confidence in child acceptance is the message that converts.

Use simple nutrition and taste first messaging.

1. Use it on pack and in-store, 'Beans count as one of your five-a-day' is simple, credible, and immediately actionable for shoppers.
2. Replace price language with value language. 'Savvy', 'hack', 'value', these position the bean buyer as someone who has made a good decision, not someone who has made a sacrifice. The framing shift is small, but the impact on purchase intent could be significant.

What is stopping industry growing the category?

Barriers

Beans are an afterthought in portfolio management, not a default consideration.

Beans are typically only considered when a specific brief calls for them, they are not systemically included in considerations of protein spread across a portfolio.

Culinary teams within supply chains are not equipped to work with beans.

NPD chefs and food developers have low levels of bean cooking education and inspiration. They are not confident working with beans across a wide range of formats and cuisines.

In-store location structurally suppresses visibility and impulse.

Beans are not currently an exciting destination in most stores. The category's in-store architecture is working against it and shoppers who might add beans to their basket on impulse rarely pass or interact with the fixture where beans live.

There is no tier architecture and no trade-up path for shoppers.

Without a coherent Good, Better, Best structure, the category cannot grow margin and volume simultaneously. Shoppers have no commercial logic to guide them upward. Retailers have no framework for premiumisation.

Solutions

Bake beans into the NPD and portfolio management process structurally.

The Samworth Brothers model is a great example of this as they have a commitment to include a bean dish in every pitch to retail customers which means beans are always on the table. Challenge NPD teams to include a bean option at concept stage across every relevant protein category.

Supplier-led culinary workshops and education sessions are a high-impact intervention.

Equipping the people who design products with the knowledge, confidence and excitement to work with beans is an upstream lever that pays out across the entire NPD pipeline. This is a near-term, risk free activation.

Secondary space is a high impact lever.

End-of-aisle, cross-category placement, and near-basket nudges are currently underinvested and underused. Moving beans adjacent to meal components, protein alternatives, or high-footfall missions, including health and wellness, meal solutions, puts them in front of the shoppers most likely to buy.

Introducing tiering can help to grow the category.

A structured own-label tier entry, mid, and premium, creates a trade-up pathway that benefits both retailer margin and category value. M&S has already launched premium own-label jarred beans. The architecture is beginning to form and the opportunity is to accelerate it deliberately, not wait for it to emerge organically.

The Central Commercial Tensions

Not every barrier can be easily resolved. Three structural issues run through the category and cannot be tackled with single solutions.

01

Bean obvious or health by stealth.

In the short term, the fastest route to volume growth is stealth inclusion by embedding beans into ready meals, sauces, and convenience formats without prominent marketing. But the long-term ambition is different: beans as an acknowledged, celebrated hero ingredient. These two strategies are not in conflict since they operate on different timescales for different consumer segments, through different product types. The playbook calls for both, in sequence.

02

Short-term space risk versus long-term category gain.

Ranging decisions involve real trade-offs. Secondary space costs money and new SKUs displace existing ones. The commercial case for beans needs to be made in terms that buyers recognise: margin, basket size uplift, penetration metrics, not category ambition alone.

03

Innovation versus simplification.

The right balance differs by channel. In ambient, the priority is clearer tiering and stronger occasion messaging, not new formats. In chilled and food-to-go, format innovation is the growth lever. Applying the same NPD logic across all channels produces the wrong answer in each of them.



SECTION 4

Activating Growth:
The Four Commercial Levers

Product

Place

Price

Promotion



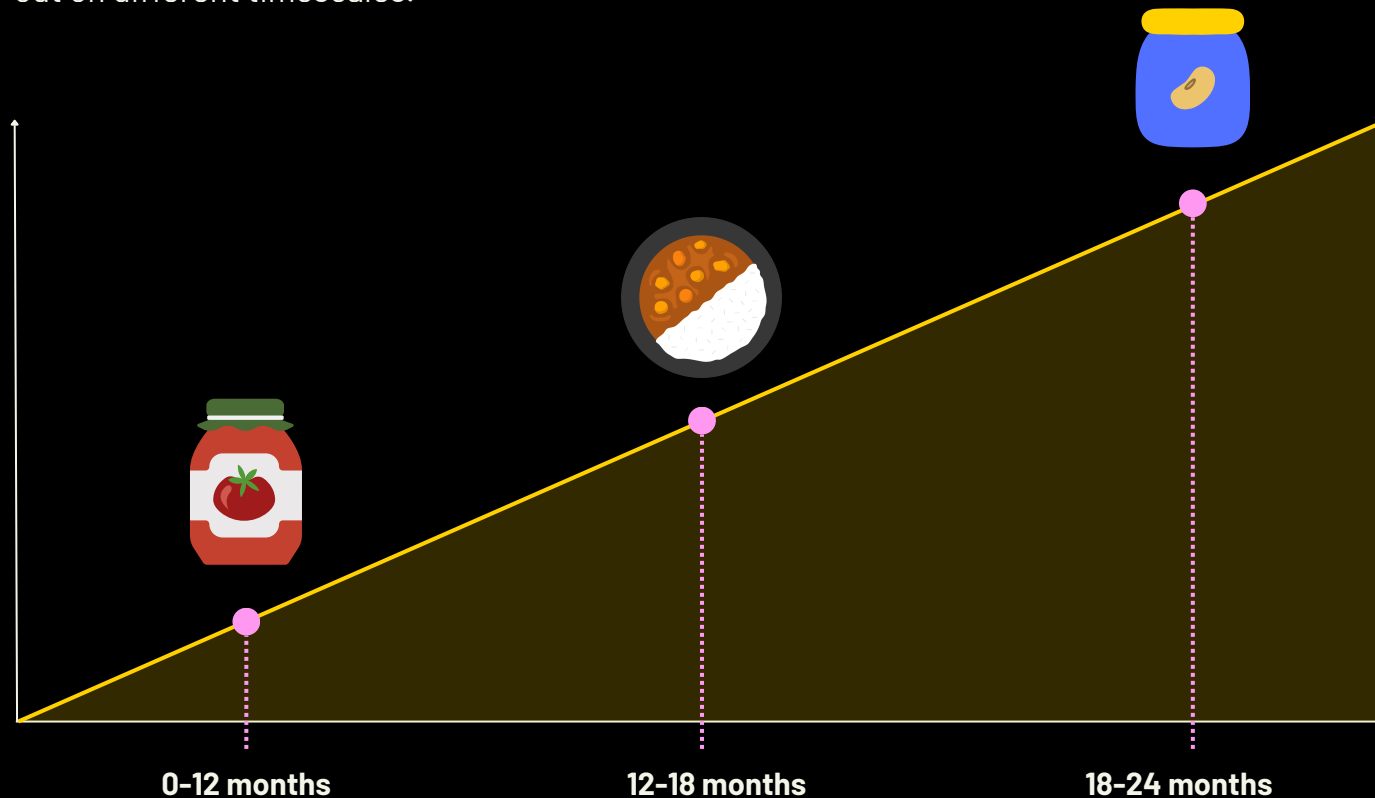
Activation Matrix Across 4 Ps

This matrix shows the opportunities we have surfaced to grow the beans category. These activities are mapped across the 4 levers (Product, Place, Price, promotion), the time investment is estimated to give an indication to the quick wins versus the longer plays and the commercial benefits are also laid out. A full breakdown of activities can be found across pages 18-23.

Lever	Activity	Impact	Impact Horizon (months)					Commercial Logic						
			0-3	3-6	6-12	12-18	18-24	Cost/Portion	Margin	Premium isation	Improved Nutrition	Drives Penetration	Drives Frequency	Drives volume
Product	NPD process reform: baking beans in as a default	H	NPD process changes		NPD outputs			✓	✓	✓	✓	✓		
	Convenience-led format innovation	H		Reformulation		NPD			✓	✓		✓		
	Tier architecture: building the trade-up path	M	NPD					✓	✓		✓		✓	✓
Price	Build a tiered pricing architecture	L	Pricing architecture implementation						✓	✓		✓	✓	✓
	Multi-buy and stock-up mechanics	L	Planning and activate										✓	✓
Place	Beans in secondary spaces	H	Plan investments		Outputs seen in store							✓	✓	✓
	In-store inspiration: closing the online-to-offline gap	H	Plan investments		Outputs seen in store							✓	✓	✓
Promotion	Loyalty scheme activation	M	Design and activate									✓	✓	✓
	Calendar and health moment hooks	H	Planning		Outputs						✓	✓	✓	✓
	Promotion collaboration	M	Design and activate									✓	✓	
	Influencer-first: seed demand before retailer activation	H	Activation									✓	✓	✓

The short-to-long product arc: stealth to hero

The two product strategies, stealth inclusion now, beans as celebrated hero ingredient later, are not in conflict. They serve different consumer segments, operate through different product types, and play out on different timescales.



In the short term: get beans into products. Blend them, hide them, fold them in. Build the volume base and the nutritional credentials without asking consumers to change their behaviour.

In the medium term: begin to surface beans as an ingredient worth noticing. Name them on pack. Feature them in photography. Build the association between the product and the ingredient.

In the long term the ambition is 'Bean Obvious': beans as an aspirational hero ingredient in mainstream products, chosen consciously and with pride. The product format, taste, quality, and the consumer familiarity all need to be aligned so this can happen.



Product

The product lever is where the longest-term value is created and where the most significant structural change is needed. It operates across three distinct priorities: format innovation, tier architecture, and NPD process reform.

NPD process reform: baking beans in as a default

At the concept stage of every relevant NPD brief, across proteins, ready meals, meal components, snacks and convenience formats, **beans should be a default consideration, not an afterthought.**

The Samworth Brothers model demonstrates this in practice: a standing commitment to include a bean dish in every pitch to retail customers. The discipline of asking the question at the start of the process changes the output of the pipeline.

The prompt for manufacturers and retailers: when reviewing protein spread across categories challenge NPD teams to ensure that a meaningful proportion of new concepts include a bean ingredient as a structural element. This is commercially relevant, aligned with consumer demand for fibre, protein and non-UPF options.

Supplier-led culinary education sessions are the enabler. NPD chefs who are confident, inspired and equipped to work with beans across a range of formats and cuisines will produce better bean products. The investment is low, but the pipeline impact is significant.

Impact horizon



NPD process changes, 0-6 months. Pipeline output, 12-24 months.

Commercial logic



Bean inclusion reduces cost per portion and improves nutritional credentials.

Convenience-led format innovation

The format gap is the category's most commercially significant structural problem. Consumers are choosing easier options but the bean category's convenience offer has not kept pace.

The priority formats for product development are chilled prepared, pouches, and food-to-go formats. These carry the highest growth signals, the strongest consumer excitement, and the clearest white space. The margin available in chilled and premium formats justifies the investment.

For manufacturers, the near-term opportunity is innovating products to include beans, particularly in ready meals, meal kits, soups and sauces. The commercial upside is cost per portion reduction, improved nutritional credentials, and alignment with retailer health reporting requirements.

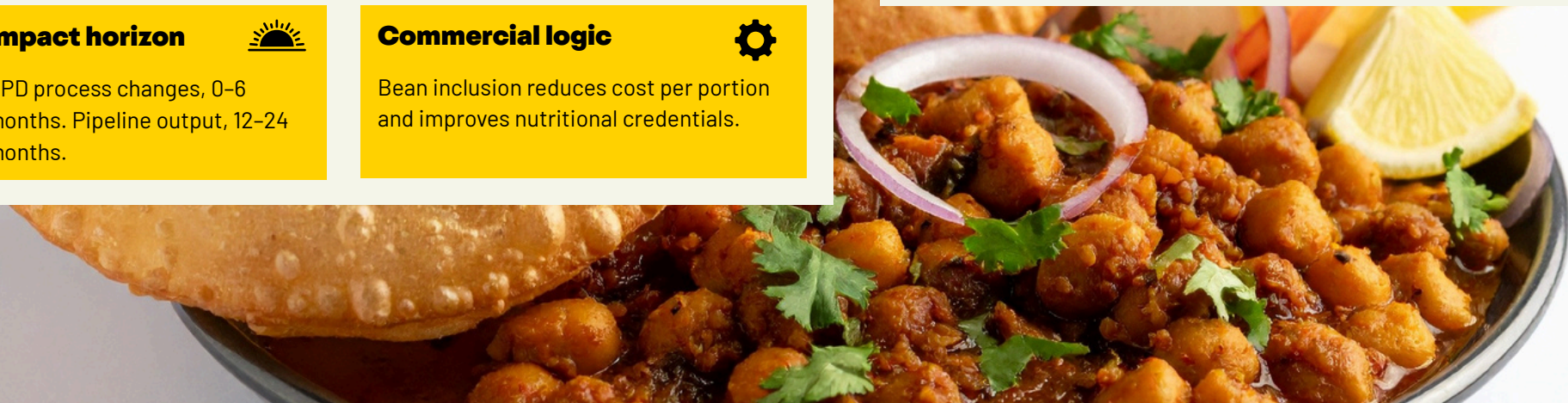
Impact horizon



Reformulation, 3-12 months.
New format development,
12-24 months.

Commercial logic

Bean inclusion reduces cost per portion in high-volume formats. Premium new formats command higher margin.



Product

Tier architecture: building the trade-up path

The absence of a Good, Better, Best own-label structure is one of the category's most immediately addressable structural failures.

The tinned tomatoes category provides the template. Mutti has been instrumental in driving trade up. Own Label products provide the value and standard tiers. KTC is an example of a value brand offering, whereas Napolina and Mutti are premium tiers. It gives category managers a story to tell in ranging reviews and it gives shoppers a reason to spend more.

M&S has already launched premium own-label jarred beans. Other retailers are expected to follow. The businesses that build this architecture deliberately, rather than waiting for it to emerge, will capture the margin opportunity first.

The near-term moves: premium own-label tier at one or more major retailers, framed around quality of bean, provenance, or preparation rather than price.

Impact horizon



6-18 months for premium own-label tier introduction.

Commercial logic



Premium own-label captures value currently only going to branded products. Structured tiering grows average transaction value without requiring new shopper recruitment.



Price

Price is not the biggest barrier when it comes to beans, but the tiering limits occasion growth for customers. It is about giving shoppers a logical path from entry to premium tiers to grow value and increase occasions.

Build a tiered pricing architecture

There is an absence of tiering that means there is no trade-up path (see page 18). A structured Good, Better, Best framework for pricing would improve the category story.

Entry: standard own-label ambient tins.

Mid: flavoured, prepared, or pouch formats.

Premium: jarred, provenance-led, or chilled ranges.

Each tier has a distinct consumer proposition, each justifies its price point and each creates a reason to move up. The result is a category that grows value and volume simultaneously, with own-label and branded product coexisting profitably at multiple price points.

Impact horizon

6-18 months for full tier architecture introduction.

Commercial logic

Tier architecture grows average transaction value. Premium own-label captures margin currently going solely to brands.

Multi-buy and stock-up mechanics

Multi-buy promotions and stock-up mechanics drive average weight of purchase among existing buyers.

They are also a low-complexity activation, available within existing promotional frameworks at most major retailers.

The strategic use of multi-buy is not to discount beans, it is to increase the quantity in the household, building habit through availability. A shopper with four tins of beans in the cupboard will find more occasions to use them than a shopper with one.

Impact horizon

0-6 months.

Commercial logic

Volume uplift from multi-buy offsets promotional discount. Stock-up behaviour drives frequency.



Place

The current in-store architecture is working against the category. Most of the changes require retailer will and time investment to make the environment easier to navigate.

Beans in secondary spaces

Secondary space is currently underinvested across the category. End-of-aisle features, cross-category placements adjacent to meal components, and near-basket nudges are all proven mechanics for driving impulse purchase, but almost none of them are being used for beans.

The cross-category placement logic is straightforward: place beans where the shopper is already thinking about what to cook. Adjacent to pasta, rice, tinned tomatoes, and meat, or in the meal solutions bay, therefore beans become a natural addition to the basket rather than a separate trip to a different aisle.

Placing beans adjacent to complementary items like staple carbs, proteins, and meal components is a more ambitious move and will require commercial negotiation, but the model exists.



For example, as seen on the right M&S have explored placement of ambient products underneath complementary chilled ranges. The principle is to make beans visible at the moment the protein decision is being made.

Impact horizon

0-6 months for initial pilots.

Commercial logic

Incremental basket addition from secondary placement drives volume without cannibalising core fixture sales.

In-store inspiration: closing the online-to-offline gap

The content ecosystem around beans online is rich and growing, but at the fixture, there is almost nothing: no excitement, no recipe prompt, no occasion suggestion, no nudge to add beans to the basket at the moment of purchase. The gap between what consumers discover online and what they are reminded of in-store is one of the most straightforward missed opportunities in the category.

Recipe cards, occasion-led shelf strips, simple messaging at secondary space locations, these are high-impact interventions which could be trialled in certain stores to test effectiveness in driving up bean sales. The principle is to catch the online inspiration at the point where it can convert into a purchase decision.

Impact horizon

0-6 months.

Commercial logic

In-store inspiration drives incremental purchase from existing footfall.

Businesses should take a helicopter view of beans across the store

Beans appear in ambient, chilled, frozen, dips, plant-based, ready meals, and food-to-go often without strategic integration or a consistent commercial logic. The result is category fragmentation and presence without impact.

The commercial opportunity is to treat beans as a cross-category ingredient with a consistent story, rather than a series of disconnected SKUs in different aisles. A buyer or category manager with responsibility for beans, or a cross-functional team with a mandate to grow the category across the store, is the organisational enabler. Without it, the placement decisions remain reactive and uncoordinated.

Promotion

The promotional lever is the most immediately visible, but promotional tactics without structural category change produce spikes, not growth. The mechanics below are designed to build habit, not just drive short-term volume.

Loyalty scheme activation

Retailer loyalty programmes are one of the most powerful and precise targeting tools available to the category. They are almost entirely unused for beans.

The opportunity is specific with targeted coupons for non-bean-buyers, identified through purchase history, incentivising first trial. Gamified challenges like 'add beans to five meals this month' that build habit through structured engagement. Health challenge integration, for example Tesco's 5-a-day campaign, or equivalent bring beans explicitly into an already-familiar loyalty format.

These mechanics reach the right consumer, the occasional buyer, the health-conscious shopper, the family looking for easy wins, at low cost, with measurable return. They require data activation and retailer partnership.

Impact horizon



3–9 months to design and activate. Results measurable within the promotional window.

Commercial logic



Trial conversion from loyalty targeting has a higher ROI than mass media. Measurable penetration lift justifies coupon cost.

Calendar and health moment hooks

Promotional timing matters. The bean category could be aligned to key calendar moments that have the opportunity to drive growth.

New Year health kicks are the most obvious and the most competitive. The opportunity for beans is to be explicit and specific within these moments rather than generic: 'Add a tin of beans, get 15g fibre' as a January mechanic has clarity and action-orientation that generic health messaging does not.

Ramadan is a significantly underused opportunity as beans are deeply embedded in many of the cuisines and food cultures associated with Ramadan, which is naturally a period of high meal planning, high household food spend, and strong community influence on purchasing decisions. A targeted mechanic during Ramadan, framed around relevant cuisines and occasions, reaches a high-value and currently underserved shopper segment.

Summer picnics season, back-to-school, and the autumn health reset are additional moments where beans could play a role if framed correctly.

Impact horizon



0–6 months for calendar planning. First activation within one promotional cycle.

Commercial logic



Health moment promotions drive trial from health-motivated shoppers, the highest-conversion segment for bean penetration.



Promotion

Promotion collaboration

Brand and retailer own label working together:

Co-branded promotions between retailers and bean brands, short-term trial mechanics, timed to relevant calendar moments are a near-term activation that works for both parties.

Brands working together:

Brands can collaborate with complementary brands to split the cost by having a joint promotion.

For brands, promotion drives visibility and trial at scale. For retailers, investment supports long term growth of the category.

Bold Bean Co., Merchant Gourmet, Brindisa, and other premium brands have the consumer credibility and retailers have the reach. The opportunity is to structure the commercial conversation and create the activation framework.

Impact horizon

3-9 months to design and activate.

Commercial logic

Shared promotional investment reduces cost per activation. Brand credibility increases trial conversion rate.

Influencer-first: seed demand before retailer activation

The sequencing of promotional activity matters. The evidence from oat milk, Greek yoghurt, and other recently mainstreamed ingredients is consistent: consumer influencers lead the narrative, retailers follow once consumer demand is evidenced.

Influencers are already increasing the demand for beans. Posts with the hashtags #fibremaxxing and #fibermaxxing have been viewed more than 150m times on TikTok ([BBC](#), 2026). That demand signal makes the retailer ranging conversation easier. It de-risks the secondary space decision and it provides the commercial evidence that a buying team needs before committing to a promotional mechanic.

The influencer activation for beans has started so now is the time for in-store activation. The messaging is taste first, health second, savvy framing throughout, and little to no plant-based or sustainability messaging.

Impact horizon

Already underway, time for in store layout and activation to catch up (3-6 months).

Commercial logic

Influencer-generated demand reduces the cost of retailer persuasion and increases the probability of secondary space allocation.



How beans are showing up in the UK market in innovative ways

Pouches



Food to Go



Chilled Prepared



Snacks



Jars



Top 5 cuisines for beans



What meal inspiration fixtures could involve

Smoky Jacket Potatoes



5 Minute Indian Fakeaway



Mexican Inspired Bowls



Orzo puttanesca

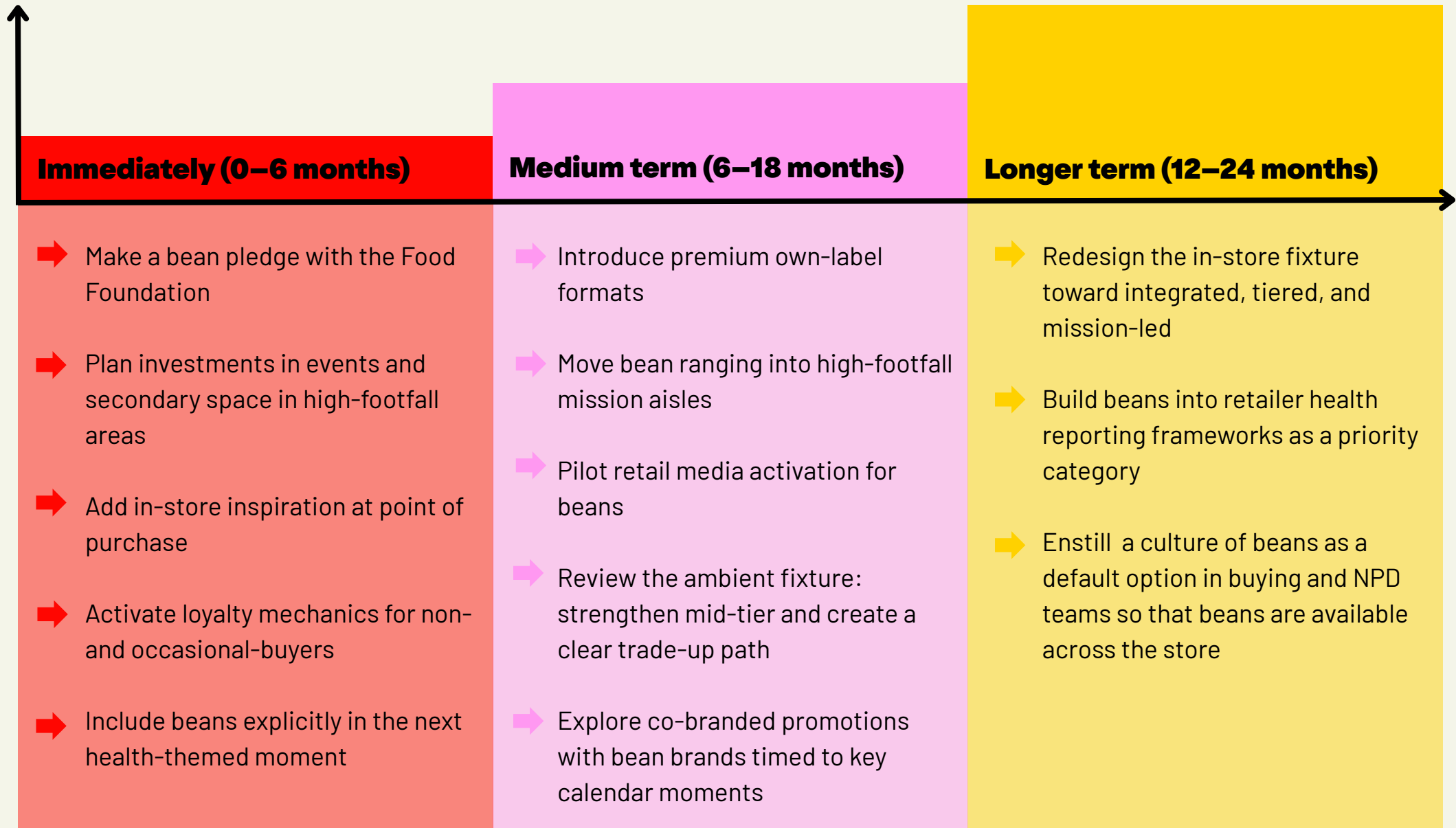


Spanish Grain Bowl



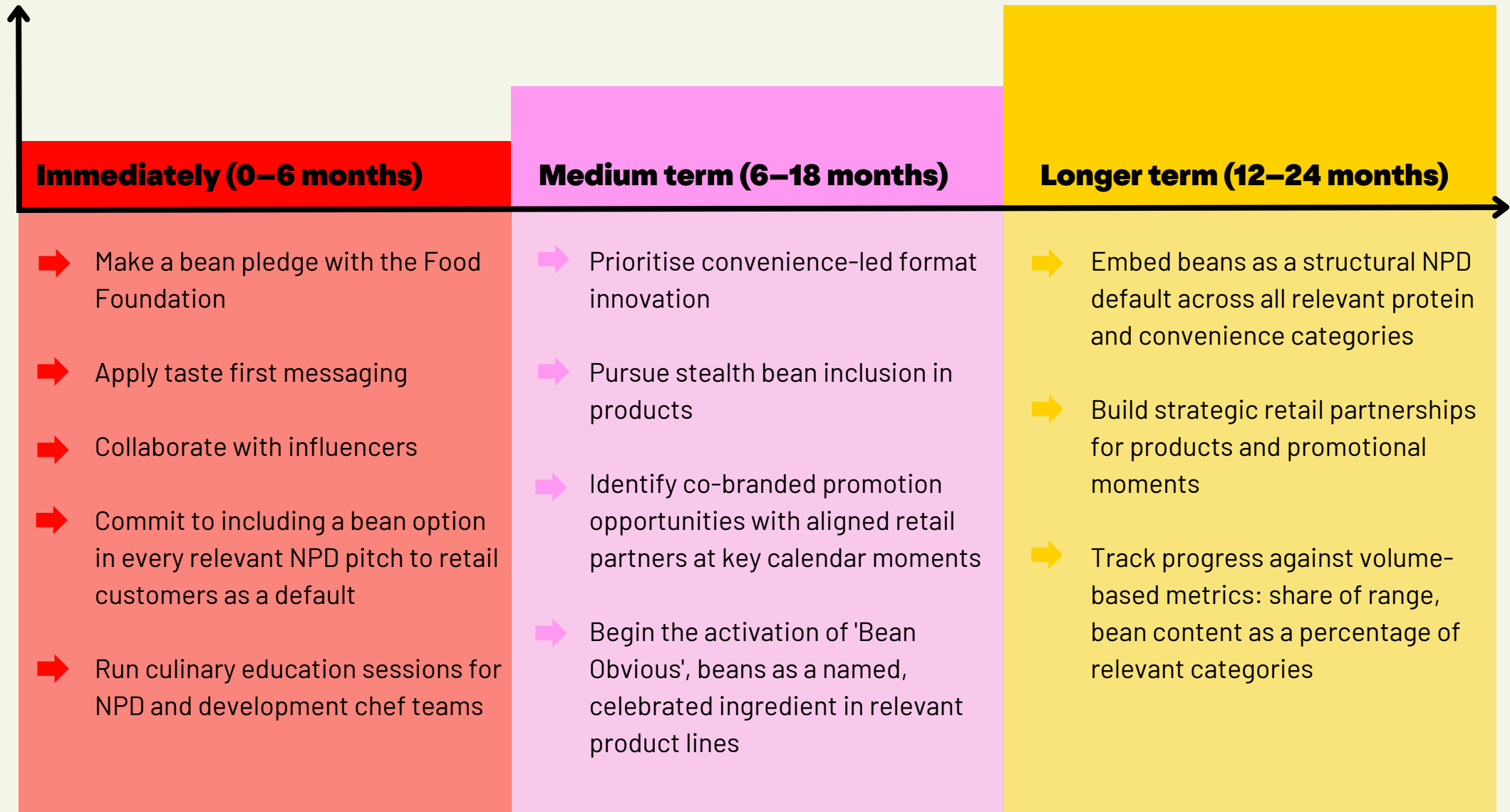
RETAILER ROADMAP

Below are is a roadmap for retailers to consider the timeline of implementing these levers for growth in the bean category. There are short, medium and long term actions to allow retailers to implement and plan ahead these for activities.



MANUFACTURER/BRAND ROADMAP

Below are is a roadmap for manufacturers and brands to consider the timeline of implementing these levers for growth in the bean category. There are short, medium and long term actions to allow retailers to implement and plan ahead these for activities.



Case Studies of Success

Albert Heijn

Albert Heijn expands its plant-based private label range, AH Terra, to 350 products. The retailer provides lots of inspiration for cooking with beans and legumes. It includes QR codes on products' packaging that take shoppers to recipe ideas.

The retailer aims for 60% of protein sales to be of plant origin by 2030.

Making the product available and visible may encourage trial while providing recipe ideas helps shoppers easily switch to new products (with thanks to IGD).



Bold Bean Co

Bold Bean Co generated £7.5 million revenue in 2024, a £5 million increase from the year before (The Grocer, 2025).

In 2024, Bold Bean Co sales grew by 259.5%, the segment's growth was 20.3% YoY.

In Sainsbury's, one in three Bold Bean Co customers are new to the canned pulses category, with half of all shoppers repeating purchase (Food Navigator, 2025).



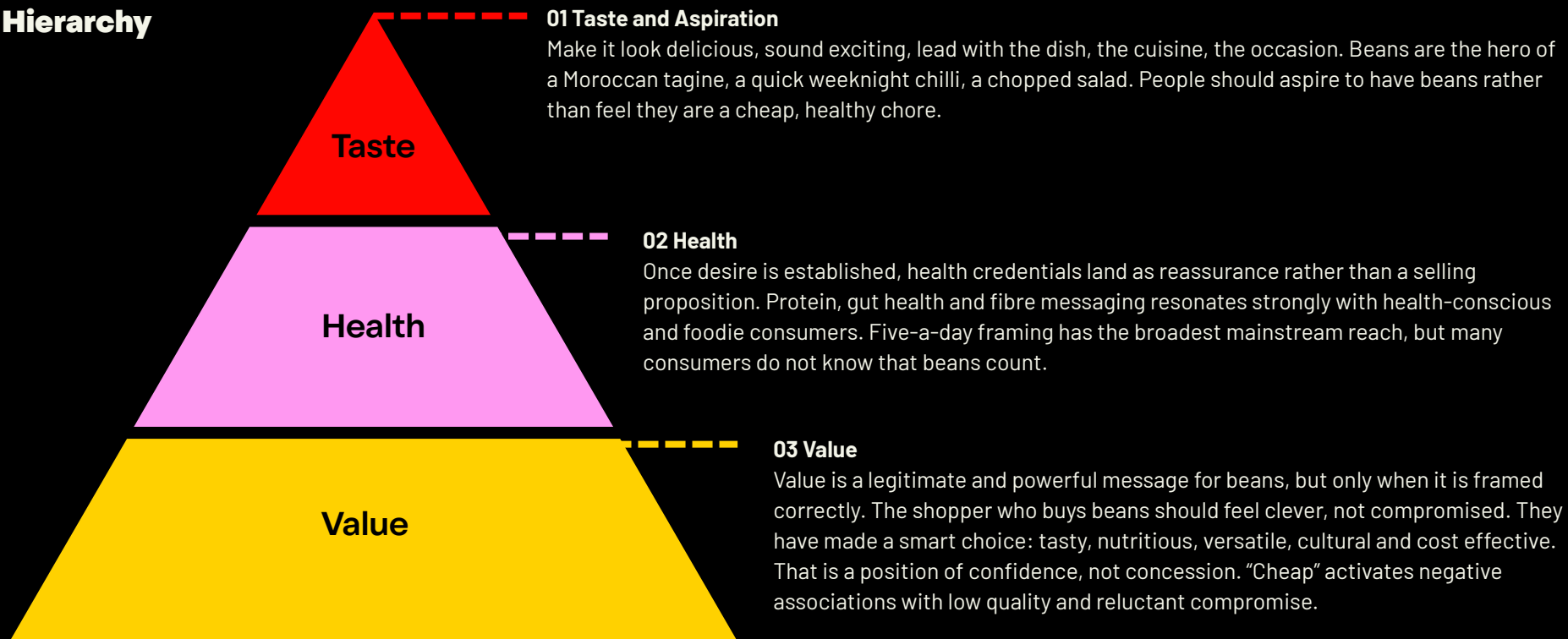
SECTION 5

Messaging Guide



Messaging Guide

The Message Hierarchy



The workshop confirmed one principle with unusual unanimity, what sells beans is taste and aspiration.

The product has to look good, sound good and feel like a choice worth making, before any secondary benefit is introduced. Every piece of communication that leads with health, cost or environmental credentials before establishing taste appeal is working against the sale.

The elevator pitch for beans:

Beans are one of the most versatile, exciting and nutritious ingredients in the UK grocery market. The demand is growing and the consumer desire is real. The opportunity is to make them more visible, more convenient and more inspiring.

Lead with: Taste. Occasion. Cuisine. Aspiration.

Follow with: Fibre. Protein. Five-a-day. Natural.

Close with: Savvy. Smart. Makes more go further.

Avoid: Vegetarian', 'vegan', 'plant-based' 'Cheap', 'budget', 'affordable' 'Sustainable', 'eco', 'planet-friendly', 'low carbon' 'Meat alternative', 'protein swap', 'instead of meat'



These terms actively suppress mainstream appeal. Each one carries associations that limit the audience, activate resistance, or position beans in a way that the category is working hard to move away from.

Beans are not a niche trend to watch.

They are a category opportunity to build.

NEXT STEPS

Join many other businesses to sign up to become
a Keen Bean pledger or Bean Promoter at:

<https://foodfoundation.org.uk/keen-bean-pledgers>

Want to do a pilot around beans?

Get in contact with:

Chloe Mackean, Food Foundation

chloe.mackean@foodfoundation.org.uk



This Playbook was developed in partnership with:



With thanks to



APPENDIX

Who's eating beans?

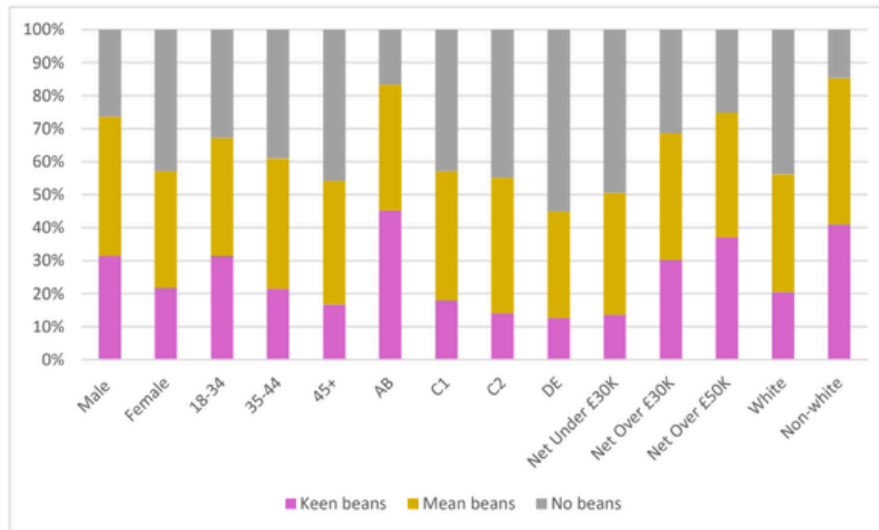
Approximately 25% of consumers eat beans three or more times a week. These are the engaged, frequent buyers currently driving category value. 37% eat beans somewhere between once a week and a few times a month, they are occasional, open, and reachable. 38% eat beans rarely or not at all.

The 37% are a key opportunity. They are already positively disposed toward beans. The barriers they face are practical: convenience, inspiration, occasion. Moving this group to regular purchase is a shorter term win, compared to the non-eaters who may take more convincing. However, the 38% represent significant long-term volume. Winning them requires a different strategy, a longer timeline, and a category that is already more visible and more convenient.

Current growth is being driven by the 25% buying more often, the next phase of growth requires the 37% buying more regularly. Two levers matter: frequency and penetration, these require different actions, but both are addressable.

- Keen Beans – those who already eat beans three times per week = 25%
- Mean beans – the average eating beans regularly but not frequently, once/week or 1-3 times per month = 37%
- No beans – never or occasionally = 38%

Let's look at how the splits on different demographics:



Food Foundation Survey conducted with YouGov, July 2025. Representative UK sample of 6,177

CATEGORY REALITY CHECK Retail Audit Findings

Methodology:

- **When:** A retail audit was undertaken from 8 January to 5 February
- **How:** The data was taken from one online retail platform. The categories searched online for presence of beans can be seen below.
- **What's in scope:** Peas, beans, legumes, and protein isolates of these were included in the audit. Therefore, soy protein based meat alternatives and products like tofu and tempeh have been included in the overall product count.

Frozen

- Vegetarian and Vegan
- Vegetables
- Sides
- Party foods
- Pies and Pastry Bakes
- Ready Meals
- Free From
- Pizza

Chilled

- Prepared Salads
- Dips
- Sandwich Fillers
- Vegan and Vegetarian
- Pies and Pastry Bakes
- Fresh Pasta
- Pizza
- Deli Counter
- Ready Meals
- Soup
- Food to Go Sandwiches
- Food to Go Salads
- Food to Go Wraps

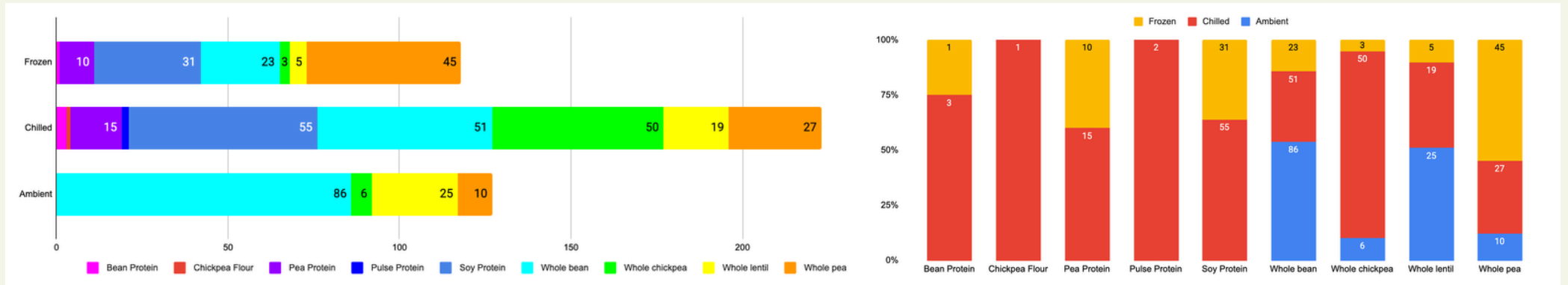
Ambient

- Tinned Vegetables
- Tinned Beans
- Dried lentils, beans and pulses
- Instant noodles and cup meals (just add hot water)
- Cooking sauces
- Added Value grains and pulses - pouches
- Easy Meal pouches
- Sauces
- Chutneys

CATEGORY REALITY CHECK

Retail Audit Findings

Where and how beans showed up across ambient, chilled and frozen categories



Beans are underrepresented in high-traffic, high-frequency categories



Gaps

Sauces
Instant Hot Snacks
Chutneys

Deli Counter
Pizza
Sandwich Fillers
Fresh Pasta

Free From
Pizza