The Food Foundation

The State of the Nation's Food Industry 2026

Spotlight Edition



ABOUT THE FOOD FOUNDATION

The Food Foundation is an independent charity working to address challenges in the food system in the interests of the UK public. Working at the interface between academia and policymakers (parliamentarians, civil servants, local authorities, business leaders and investors) we use a wide range of approaches to make change happen including events, publications, media stories, social media campaigns and multistakeholder partnerships. We also work directly with citizens to ensure their lived experience is reflected in our policy proposals. We work with many partners on a range of different thematic areas, working closely with academics to generate evidence and campaigners who can drive change. We are independent of all political parties and business, and we are not limited by a single issue or special interest.

Visit: foodfoundation.org.uk

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Introduction

This year has brought a stark reminder that the UK's food system is not insulated from the growing impacts of climate change or geopolitics. Extreme weather events have reached our own doorstep, disrupting harvests, affecting crop yields and exposing the vulnerability of food supply chains. As concerns over food security and resilience move up the agenda, there is increasing recognition of the need to build more resilient supply chains here in the UK.

Beans and other pulses have a role in this resilience agenda. Including them in crop rotations can support soil fertility and reduce reliance on synthetic nitrogen fertilisers. Building demand for British-grown pulses, alongside investment in processing and dependable purchasing commitments, can also strengthen domestic supply chains and give growers more secure routes to market. Realising these benefits requires closer connections between what farmers grow, what businesses sell, and what people eat (The Food Foundation, 2026c).

Building a healthier, more sustainable and resilient food system requires businesses to change what they sell, and to measure and report on that change. This SOFI Spotlight report examines both: whether major food businesses are setting targets and disclosing progress, and how increasing bean sales can help turn commitments into practical action.

The Food Foundation's Plating Up Progress benchmark assesses the extent to which major UK food businesses are setting targets and publicly reporting on the sales of healthy and sustainable foods. There has been a disappointing slowdown in progress on transparency. After several years of gradual progress, this year's findings are worrying, with little movement on target-setting and disclosure and, in some cases, a reduction in publicly available information.



While businesses could have done more to drive progress over recent years, responsibility for this stagnation does not sit solely with industry. Progress has also been hampered by continued delays to mandatory healthy food sales reporting. Businesses have been waiting for the government to set out the framework, but at the time of writing, the promised consultation has yet to appear. This is a gross failure by government, as it is widely acknowledged, and identified in the **10 Year Health Plan** that target setting and disclosing sales of healthy food is a key strategy for driving healthier diets.

At the same time, businesses face growing external pressures around public targets and disclosures. In an increasingly uncertain economic environment, some companies are becoming more cautious about making commitments that may expose them to further investor scrutiny. This report shows early signals of a weakening of target setting and transparency that is set to continue.

Meanwhile, a number of proactive businesses have continued to disclose data voluntarily. While welcome, the emergence of multiple reporting approaches risks creating a fragmented landscape that makes progress harder to assess and compare. Government leadership

remains essential to establish a common framework, create a level playing field and ensure all businesses are measuring success against the same standards.

Yet alongside this disappointing picture on transparency, there is also optimism.

This report also examines the first year of the Food Foundation's Bang In Some Beans campaign, which aims to double the amount of beans consumed in the UK. Encouragingly, food businesses have embraced the opportunity, and a plethora of menu innovation, new products, trials and other activities to get more beans sold and served have been introduced. These efforts are beginning to translate into measurable change. Overall sales of beans, tofu and tempeh have risen by 7.3%, and more people are eating beans than before. Hopefully this is only set to increase with the recently announced changes to the School Food Standards, which will see pulses play a much larger role in school meals. While there is still considerable distance to travel, these early signs demonstrate that when businesses set clear goals and take action, meaningful shifts towards healthier and more sustainable diets are possible.

Taken together, the findings in this report highlight both the challenges and opportunities facing the UK food system. They show that voluntary action can deliver progress, but also that clearer direction from government is urgently needed. As climate pressures intensify and concerns about diet-related ill health continue to grow, the need for consistent reporting, greater transparency and stronger accountability has never been more important.

Key Findings

BUSINESS TRANSPARENCY: PROGRESS HAS STALLED

Compared to last year, only **one** new company, **Nomad Foods**, has set a **new sales-based target for healthy food sales** and **fruit and veg**.

- **33%** companies report against healthy food sales targets
- **21%** against fruit and vegetable targets
- **ONLY Lidl GB** against an **animal-to-plant protein** target and disclosure.

The top businesses for **transparency** from retail, manufacturing, wholesale and OOH are:

LIDL GB,
PREMIER FOODS,
BIDFOOD
COMPASS GROUP UK & I

Inconsistent definitions and reporting scopes continues to **limit the ability to compare between companies**, highlighting **urgent need** for **MANDATORY REPORTING** across the three metrics

BEANS: A PRACTICAL OPPORTUNITY FOR PROGRESS

29 BUSINESSES have set a public target to sell more beans, **86%** of these pledgers have seen a **positive uplift in sales**

This sits alongside **MARKET GROWTH**, with sales value of beans **up by 7.4%** and sales volumes across six food-to-go bean-containing categories **increasing by 5.4% year-on-year**

CONSUMER MOMENTUM is growing as well with **19%** of the population now eating beans **AT LEAST twice a week** in 2026, up from 16% in 2025

Business Transparency on Healthy and Sustainable Diets



WHY IT MATTERS

Robust data underpins effective decision-making. When food businesses set targets and report transparently against them, stakeholders, including investors, can better track progress, assess performance and understand how the food system is changing and the extent to which businesses are supporting a transition to healthier and more sustainable diets. Investors, as shareholders, can also promote progress and act through company engagement or vote at Annual General Meetings.

The Food Foundation's **Plating Up Progress** (PUP) benchmark has tracked the health and sustainability performance of major UK food businesses for more than six years. Through annual reporting and an interactive dashboard, PUP has become a leading source of evidence on how businesses are contributing to healthier and more sustainable diets.

Our reporting has shown that some companies are moving ahead of government policy by setting time-bound, sales-based targets and publicly disclosing progress. However, significant gaps remain across sectors, and inconsistencies in the scope and quality of reporting make meaningful comparisons difficult.

Although the NHS 10 Year Plan committed to mandatory healthy sales reporting for large food businesses in July 2025, the government have yet to set clear timelines and the consultation has still not been published despite civil society and investor pressure. This lack of action from government is a gross failure in tackling public health.

The Government should publish its consultation on mandatory healthy sales reporting with immediate effect. To drive a shift towards healthier and more sustainable food sales, businesses should ultimately be required to publicly report against, and set targets for three key metrics: healthy food sales, fruit and vegetable sales, and protein split.

Recognising the complexity involved in implementing these different metrics, a phased approach could provide a pragmatic route towards this gold standard, provided it is accompanied by a clear and ambitious implementation timeline. This should begin with mandatory reporting of healthy food sales, followed swiftly by fruit and vegetable sales and protein split. Crucially, introducing a phased approach should not result in any further delay to publishing the consultation.

Shifting protein sales from animal to plant-based sources, while good for health, can also reduce Scope 3 emissions and support progress towards Net Zero, as animal protein has a significantly higher carbon footprint than plant proteins. This year, a number of organisations in the UK and Europe have coalesced around a coordinated call to action for retailers: measure, set targets and publicly report on the balance of plant and animal source proteins. Plant Rich UK's ambition is for at least 30% of sales by volume within the protein-source food group to be plant-based by 2030 (Plant Rich UK, 2026).

WHAT WE DID

We drew on the three key diet metrics from the PUP benchmark, which together gives an indication of the healthiness and sustainability of a company's overall food portfolio. PUP assess 42 major UK food businesses including eleven retailers, nine casual diners, seven manufacturers, seven quick service restaurants, five contract caterers and three wholesalers. This year, we have included Azzurri Group, Greene King, Stonegate Group, Loungers and Subway as they are among the largest businesses within their sectors and include different types of hospitality businesses such as pubs. For each company, we assessed whether they have voluntary set targets and disclose data for:

- **Healthy food sales - using either a sales-weighted average or % sales of high fat, salt and sugar (HFSS) foods**
- **Fruit and vegetable sales - % of total sales that are fruit and vegetables**
- **Protein sales - % of total protein sales from animal vs plant-based sources**

Tables 1-6 assess companies' voluntary transparency based on the type of data and targets they publicly disclose. This year, companies are ranked from those showing the greatest transparency, by disclosing sales or procurement data and/or setting targets, to those that disclose neither. These findings should be viewed in the context of PUP's coverage: only a selected group of major food businesses is assessed, so other large businesses that do little or nothing on disclosure or change are not captured or held to account by the benchmark.

The **gold standard remains targets and disclosure that are sales-based and reported in volume (tonnage)**, as this directly reflects what is being consumed and is not distorted by inflation, like value-based reporting (£). For the Out of Home (OOH) sector, procurement data is accepted as a proxy for sales, given the challenges of obtaining sales data.





Explore the Plating Up Progress dashboard to compare performance across food businesses and sectors and on other metrics such as animal welfare and human rights.

FINDINGS: WHAT'S CHANGED

Retailers

Although retailers introduced no new targets or disclosures this year, they continue to lead reporting across all three metrics. **Lidl GB continues to be the leading retailer and is the only company with sales-based targets and data for all three diet metrics**.

All retailers continue to disclose sales-based healthy food data, but their reporting remains inconsistent. They differ in whether they cover own-brand products only or both own-brand and branded ranges, how they define 'healthy food', and which metric they use. For example, Tesco reports both branded and own-brand sales in units, whereas Sainsbury's reports both in volume (tonnage).

Reporting is also inconsistent across the fruit and veg and protein split metrics. For example, M&S and Waitrose include vegetarian and vegan products in their sales-based targets and data.

Manufacturers

Manufacturing ranks a close second to the retailers for overall progress on transparent disclosure and target setting. All but one company (Mars) report sales of healthy foods, although metrics still vary as Nestlé continues to disclose value rather than volume.

Nomad Foods have now set a sales based target for their healthy sales and continue to report data, whereas Premier Foods has strengthened its reporting this year by reporting robust volume-based data along side their

value-based data. Volume based data represents the gold standard for reporting, providing a clearer indication of what is actually being consumed and enabling more meaningful assessment of dietary impact.

Beyond healthy sales, there are also encouraging shifts within the fruit and veg metric with Nomad Foods setting a target to increase sales of fruit and veg, while Premier Foods report sales-based data. **Premier Foods is now the leading manufacturer as they disclose sales-based data across healthy food, fruit and veg and plant-based protein**.



CREDIT: PREMIER FOODS

Wholesalers

Similar to the other sectors, none of the wholesalers assessed have set a new commitment or disclosed data. **Bidfood remains the leading wholesaler and the only one that publicly reports sales-based data across all three metrics**.

Out of Home

For the OOH sector we analyse contract caterers, casual dining businesses, and quick-service or fast-food restaurants (QSRs). **This year, none of the companies within these sectors have public targets, instead their transparency has worsened**. Compass Group UK&I's previous commitment to shift 25% of animal protein sales to plant-based protein is no longer active. As a result, there are currently no out-of-home (OOH) companies with a sales-based protein target. Only ISS now report on their procurement data for animal and plant-based foods and Compass Group UK&I report percentage of products high in animal and plant protein.

JD Wetherspoon, The Restaurant Group, Burger King, SSP, Aramark and Sodexo continue to report data against targets on the proportion of vegan and vegetarian options on their menus. While this is a useful indicator of menu availability, it does not show how much plant-based protein customers are buying.

Currently, no OOH company has a sales-based target or reports sales data for healthy foods. Greggs, KFC and Wagamama (part of The Restaurant Group) are the only companies that report the proportion of their product range classed as healthy.

Despite withdrawing its protein split target, **Compass Group UK&I remains the OOH sector leader. It is the only company with a sales-based target and data for fruit and vegetables**.

OVERALL

Compared with last year's analysis, no company assessed in PUP has set a new sales-based target across the three key metrics. Transparency on protein sales remains the weakest, with Lidl GB being the only company to set a sales-based target and disclose data. There are, however, some encouraging steps with Premier Foods and ISS now reporting plant-based protein data.

Beans offer another way in. Even without a protein split target, 15 companies assessed in PUP have made a sale-based commitment to increase bean sales as part of the Bang In Some Beans campaign to double UK bean consumption by 2028. While a 'Keen Bean' pledge to sell more beans does not represent the full plant-based picture, it is a public commitment and a foundation to build on for growing the plant-based category generally.

Where companies do disclose data on any of the three diet metrics, reporting remains inconsistent (Tables 1–6), making it difficult to compare progress within and across sectors. Companies use different definitions, metrics and reporting scopes, with some reporting sales-based measures and others reporting product-range metrics. This lack of consistency creates opportunities for selective reporting and makes it harder to assess genuine progress. Mandatory reporting against standardised healthy and sustainable diet metrics would improve transparency, comparability and accountability across the food sector. **For further discussion of the risks of selective reporting and industry gaming, see The Food Foundation's blog on healthy food sales reporting**.

Limited progress on transparency and target setting likely reflects the uncertainty around the government's plans for mandatory reporting. While businesses have signalled support for a more consistent reporting framework, the absence of clarity on the scope, metrics and implementation timeline may be discouraging further investment in reporting systems and public voluntary disclosure.

KEY

TYPE AND SCOPE OF TARGET AND DATA

Sales based
Not sales based
No commitment or target
Not SMART †

1	Volume (tonnage)
2	Unit
3	Revenue
4	Procurement

A	Branded and own-brand products in scope. The gold standard, covering the entire portfolio (applicable for retailers only)
B	Own-brand products in scope only (applicable for retailers only)
C	Range specific (e.g. menus or ready meals)

TABLE 1

Retailers with a sales-based target and/or disclosing data for sales of healthy/HFSS food, fruit and veg and animal vs plant protein

Company	Health/HFSS		Fruit and veg		Animal		Plant	
	Target	Data	Target	Data	Target	Data	Target	Data
Lidl	1B	1B	2B	2B	1A	1A	1A	1A
Iceland	1B	1B	1B	1B			1A	1A
Sainsbury's	1A	1A	1A	1A		1A		1A
Aldi	1B	1B	1B	1B				1C
Coop	1B	1B		1B		1B		1B
M&S	1B	1B	1B*	1B*			1B*	1B*
Morrisons	1B	1B		1B		1B	C	1B
Ocado Plc		1B	1B	1B		1A		1A
Tesco Plc	2A	2A		1B		1A		1A
Waitrose	1B	1B	1B*	1B*		1B		1B
Asda	1A	1A						



† A SMART target is a goal that follows a framework of five criteria: Specific, Measurable, Achievable, Relevant, and Time-bound.
* Commitment includes other ingredients

TABLE 2

Manufacturers with a sales-based target and/or disclosing data for sales of healthy/HFSS food, fruit and veg and animal vs plant protein

Company	Health/HFSS		Fruit and veg		Animal		Plant	
	Target	Data	Target	Data	Target	Data	Target	Data
Premier Foods	3	1		1			3	1
Samworth Brothers	1	1		C		1		1
Nomad Foods	1	1	1	1				
Danone	1	1					3	3
Greencore	1	1				C		C
Mars	C	C	C	C				
Nestle		3						

TABLE 3

Wholesalers with a sales-based target and/or disclosing data for sales of healthy/HFSS food, fruit and veg and animal vs plant protein

Company	Health/HFSS		Fruit and veg		Animal		Plant	
	Target	Data	Target	Data	Target	Data	Target	Data
Bidfood		1		1		1		1
Bestway								
Brakes								

TABLE 4

Contract caterers with a sales-based target and/or disclosing data for sales of healthy/HFSS food, fruit and veg and animal vs plant protein

Company	Health/HFSS		Fruit and veg		Animal		Plant	
	Target	Data	Target	Data	Target	Data	Target	Data
Compass Group UK&I			4	4		C		C
ISS				4				4
Elior			3*					C
Aramark							C	
Sodexo							C	

TABLE 5

Quick service restaurants with a sales-based target and/or disclosing data for sales of healthy/HFSS food, fruit and veg and animal vs plant protein

Company	Health/HFSS		Fruit and veg		Animal		Plant	
	Target	Data	Target	Data	Target	Data	Target	Data
Greggs Plc	C	C	C	C		1		
Burger King							C	C
KFC	C	C						
SSP							C	C
Dominos								
McDonalds								
Subway								

TABLE 6

Casual diners with a sales-based target and/or disclosing data for sales of healthy/HFSS food, fruit and veg and animal vs plant protein

Company	Health/HFSS		Fruit and veg		Animal		Plant	
	Target	Data	Target	Data	Target	Data	Target	Data
JD Wetherspoon							C	C
The Restaurant Group							C	C
Azzurri Group								C
Greene King								
Loungers								
Mitchells & Butlers								
Nandos								
Stonegate Group								
Whitbread								

RECOMMENDATIONS

If businesses were more like

- **Premier Foods** have moved from value based to volume-based disclosure across all three metrics which is a positive shift as it provides a more accurate picture of consumption and is not distorted by inflation.
- **Lidl GB** is still the only company to have both a target and reporting data for all three metrics.

What can businesses do

1. Set healthier and more sustainable sales-based targets and publicly disclose performance against them annually.
2. Join the Keen Bean Pledger community by committing to a sales-based target to increase beans sold and served.
3. Sign the Plant Rich UK's Call to Action for at least 30% of all protein-source foods to be plant-based by 2030.
4. Show support for the Good Food Bill, calling for legislation to transform the UKs food system by signing the statement.



Bang In Some Beans: Keen Bean Pledgers Progress



WHY BEANS MATTER: FROM METRIC TO MOVEMENT

Analysis from the Plating Up Progress benchmark found that transparency remains weakest on the protein split metric, despite its importance for both public health and climate goals. Shifting sales from animal-source foods towards plant-based foods offers a significant opportunity to reduce food-related emissions while supporting healthier diets (Pollicino, Blondin and Attwood, 2024; The Food Foundation, 2025).

Beans provide one practical route to support this transition. Through affordable, appealing products and dishes, they can help increase plant-based protein consumption and displace some red and processed meat. While bean-specific commitments are not a substitute for comprehensive protein-split targets, they offer a tangible starting point, especially when coupled with measurable actions to increase sales. The first year of Bang In Some Beans highlights how businesses are beginning to put this approach into practice.

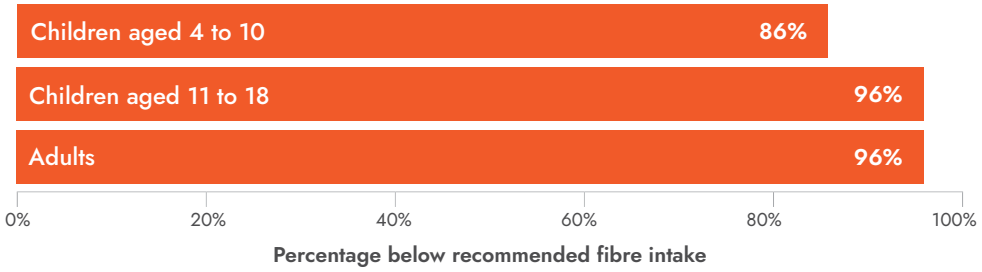


Source: The Food Foundation (2025)

Beans provide both protein and fibre, as well as many other nutrients. Most children and adults fall short of fibre consumption recommendations (Figure 1), despite higher fibre intake being associated with a lower risk of heart disease, type 2 diabetes, and bowel cancer (NHS, 2026). Eating beans more regularly could help close this gap. They also offer an affordable option: per 100g, meat costs on average 2.6 times as much as beans (Figure 2). Alongside their lower production emissions compared with many animal-source foods, these benefits make beans a practical route towards healthier, more sustainable diets (The Food Foundation, 2025).

FIGURE 1

Most children and adults **fall short of fibre** recommendations



Source: The Food Foundation (2025), Bean Facts.

FIGURE 2

Beans offer an affordable route to protein diversification



Source: The Food Foundation (2025)

Launched in November 2025, Bang In Some Beans is a UK-wide campaign led by The Food Foundation with Veg Power and partners across the food system, aiming to double UK bean consumption by 2028. It combines business commitments with recipes, media and social content, school activities, and community projects to make beans more familiar, appealing, and readily available. Here, "beans" includes beans, pulses and other legumes.

A key pillar of the campaign is supporting businesses with practical routes to increase bean sales. Through the 'Keen Bean' pledge, businesses can make a sales-based commitment with a specific target to increase the volume of beans sold or procured, allowing us to track year on year data. The following sections report on the first year of those pledges, including case studies or impactful work amongst the Keen Bean businesses.

GROWING MOMENTUM FOR BEANS

Beans are finding new audiences, from football stadiums to social media feeds; contract caterer Levy is developing bean-containing dishes for Premier League matchday menus (Levy UK + Ireland, 2026), while posts tagged #fibremaxxing have attracted more than 150 million views on TikTok, reflecting wider interest in fibre-rich eating (Clegg and Dean, 2026).

Bang In Some Beans and its messaging has appeared in numerous publications including The Guardian, The Times, The Telegraph, Men's Health, HuffPost, and Good Food, reflecting the public's growing interest in beans from health, affordability, and environmental perspectives (The Food Foundation, 2026a).

High-profile figures, from chefs and food influencers to sport nutritionists and educators, have joined forces with the campaign, using their platforms at events including Good Food shows and on social media, to bring beans to new audiences through recipes, ideas, and inspiration (The Food Foundation, 2026a).

OVER
47 MILLION
Socials impressions with average **engagement rate by reach** of **4.3%***

AND OVER
500 MEDIA HITS
(PRESS, TV, RADIO) FOR
Bang in Some Beans

MORE THAN
70 INFLUENCERS
+ campaign ambassadors
WITH A COMBINED FOLLOWING OF OVER
8 MILLION
have shared 100s of recipes and tips

*4.3% Food & Beverage average of 0.4%; Micro-influencers 50K–500K average 0.86%; 3%+ is regarded as exceptional. Ref. Sprout social



Increased coverage for beans online and in print media has come at a time when public perception of beans is growing. YouGov research commissioned by The Food Foundation points to **growing interest in beans, alongside positive attitudes towards their taste and health benefits**.

TABLE 7
Consumer attitudes and reported bean consumption

Survey measure	2025 data: YouGov (2025)	2026 data: YouGov (2026)
Report eating beans at least twice a week	16%	19%
Agree that people are talking more about beans	22%	26%

Source: YouGov research commissioned by The Food Foundation, 2025 and 2026.

Consumer demand for beans is also changing

Sales data provided by NielsenIQ indicate that consumer attitudes are also translating into purchases. The analysis compared six food-to-go categories containing beans, (including pulses and legumes): ambient soup; canned and jarred beans, lentils and chickpeas; chilled soup; salads; sandwiches; and savoury snacks- over the equivalent 52-week periods ending in September 2025 and September 2026. **Overall, sales value increased by 7.4%, while sales volume (kg) increased by 5.4%. This suggests that growth was driven mainly by consumers buying more, although higher prices or a shift towards higher-priced products also contributed** (The Food Foundation, 2026d).

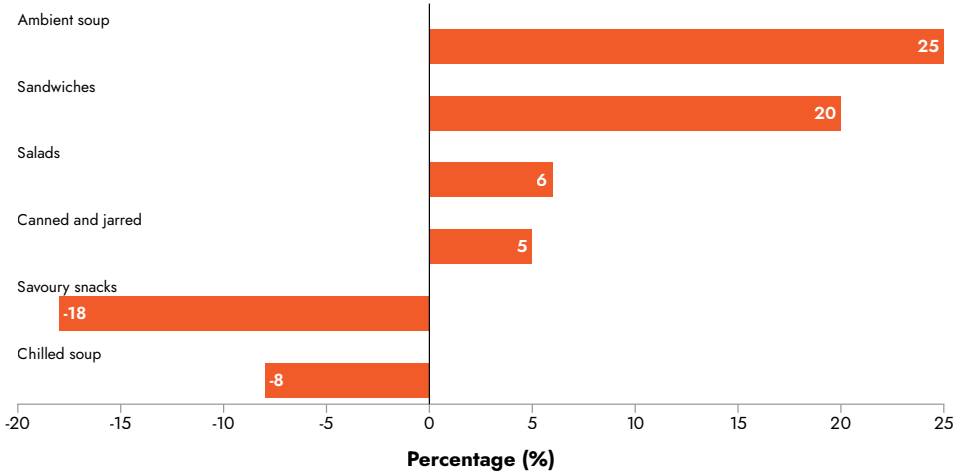
Across the six categories, ambient soups and sandwiches performed the strongest with volume sales increasing by 25% and 20% respectively. Meanwhile, chilled soup and savoury snacks saw a drop in sales by 8% and 18% respectively. Beans are entering food-to-go with several new sandwich product launches this year but there is a much larger untapped commercial opportunity. Beans have an entry point within the food to go and snacking categories that has not been fully activated. See more in our Unlocking Commercial Growth for Beans playbook which translate insight into a set of commercially grounded levers and practical actions retailers and manufacturers can take to sell more beans.



This positive uptick is echoed by Madre Brava's analysis of NielsenIQ data earlier this year, **with combined unit sales of beans, pulses, tofu and tempeh growing by 7.3% in the first half of this year compared to the same period in 2025** (Madre Brava, 2026):

FIGURE 3

Year on year % change across different bean categories for both branded and own-label products (volumn,kg)



Combined unit sales of beans, pulses, tofu and tempeh have increased >> 7.3%

Source: (Madre Brava/NielsenIQ, 2026)

WHAT WE DID

Since the Bang In Some Beans campaign launched in November 2025, 48 businesses have joined the campaign. 17 of those businesses are Bean Promoters, which means they have set SMART targets to making beans more appealing and available. The remaining 31 of the businesses are 'Keen Bean Pledgers' and have taken the more ambitious step of setting public sales targets to selling more beans.

Keen Bean pledges range in scope and ambition, from increasing a bean category by a % to doubling volume sales of all bean products. Businesses that have set the most ambitious targets will naturally have further to travel to achieve them. A perceived lack of progress should not therefore be interpreted as underperformance, particularly where targets are stretching. Instead, businesses should be recognised for setting ambitious goals and driving meaningful change. Each type of pledge also varies slightly by sector. For more information, please see the commitment framework.

Keen Bean Pledgers were asked to self-report data. Pledgers' progress was assessed against the trajectory required to achieve their target by 2028. This considers the different target sizes and length of time pledgers have to achieve their target providing a fairer comparison of progress, particularly for those who may join in the future. See the technical report for more information.

The 48 companies who have become Keen Bean Pledgers or Promoters >>



FINDINGS

This year marks the first reporting cycle for the Keen Bean pledgers, with pledgers showing strong aggregated growth of 16% over a short timeframe. Of the 22 companies reporting data, 86% have seen a positive uplift in sales, with 32% on track to meet their targets by 2028, while 27% have already achieved their targets. This positive sales picture echoes the data from NielsenIQ which shows an increase of bean sales across various retail categories. It is also encouraging to see that the spread of businesses who are ahead of pace or have already met their target are from a range of sectors, demonstrating that people are eating more beans out of home as well as in home.

Only four pledgers are currently behind the trajectory needed to meet their 2028 targets. However, this does not necessarily mean they will fall short, as they still have two years to take further action. It should also be noted that the reporting timeline falls between June - July and the campaign only began in November 2025, which means plegers have only had eight months to take action against their pledge. Even for the pledgers who have shown modest progress this year, the picture behind the story is positive, with strong sales for ranges of dried pulses or other tinned beans, and the overall sales volume being down due to a shift in suppliers.

Regardless of progress, the fact that these businesses have set public sales targets should be applauded as it takes nerve and leadership to make a public commitment in our current climate.

TABLE 8
Keen Bean Pledgers Progress in year 1

- Platinum pledge
- Gold pledge
- Basic pledge

*	Achieved target early
	On trajectory to meet target
	Slightly behind trajectory
	Behind trajectory
	Report next year

Type of pledge	Company	Pledge	Score
Gold	Aldi	+ volume sales for all bean products by 15%	
Gold	Almanhall	+ volume sales for all bean products by 30%	
Gold	Angel Hill Food	+ volume sales for all bean products by 25%	
Platinum	Baxter Storey	Double volume sales for all bean products	
Gold	Bidfood	+ volume sales for all bean products by 30%	
Gold	Brakes	+ volume sales of fresh and ambient beans	
Basic	Brindisa	+ category volume sales by 30%	
Basic	Compass Group UK&I	+ proportion of beans procured by 15%	
Basic	Elior	+ the proportion of beans procured by 20%	
Platinum	Field Doctor	Double volume sales for all bean products	
Platinum	Finnebrogue	Double volume sales for all bean products	
Gold	Harvester	+ volume of procured beans by 15%	*
Basic	Higgidy	+ volume sales for beans by 15%	
Gold	Iceland	+ volume sales for all bean products	
Basic	ISS	+ proportion of beans procured by 25%	
Basic	Levy	+ proportion of beans procured by 15%	*
Gold	Lidl GB	+ volume sales for all bean products by 50%	
Gold	M&S	+ volume sales for all ambient bean products by 15%	*
Platinum	Merchant Gourmet	Double volume sales for all bean products	
Basic	National Trust for Scotland	+ the proportion of beans procured by 15%	
Gold	Nursery Kitchen	+ volume sales of beans by 75%	
Gold	Ocado	+ volume sales of all ambient bean products by 15%	*
Basic	Sainsbury's	+ category volume sales	
Basic	Subway	+ proportion of starters, main meal and sides containing beans by 20%	*
Platinum	Suma	Double volume sale for all beans_	
Gold	The Compleat Food Group	+ sales of bean products within portfolios by 50%	
Gold	Vegetarian Express	+ volume sales for all bean products by 25%	
Gold	Wahaca	+ volume sales of bean by 10%	
Basic	Waitrose	+ volume sales for all bean products by 25%	*

Business Action to Sell More Beans

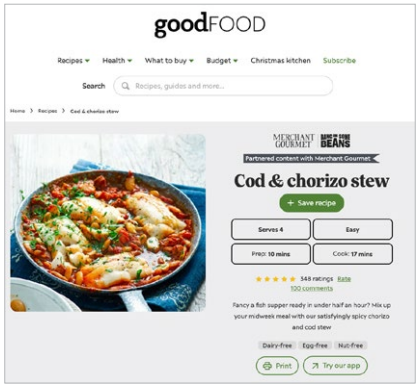
Keen Bean Businesses have been taking multiple actions to turn bean momentum into sustained long-term ctaegory growth. The following section provides a snapshot of what Keen Bean Businesses have been up to, followed by a series of case studies.



Nursery Kitchen's Sweet & Sour bean dish launched for the campaign



Wahaca's Bold Bean butter bean dip put on the menu for the campaign



Merchant Gourmet have teamed up with media partners Good Food to hero a series of bean recipes on the Good Food website and app



Sainsbury's Full on Fibre campaign



Promotion to support launch of Brindisa's premium quality Perelló Judión Beans



M&S's new premium bean product range



>>
Collection of bean recipes and meal inspiration for Bidfood customers



Co-op's Spicy Bean and Cheese Chilli Wrap, launched this year

Driving bean purchasing through wider visibility

As part of its commitment to increasing bean consumption, and supporting customers to eat more fibre, Sainsbury's has been exploring how greater in-store visibility through secondary space and price promotions can help customers discover and enjoy more beans as part of everyday meals.

In August 2025, a two-week trial across 415 stores positioned Bold Bean Co. products on dedicated displays in the meat, fish and poultry aisle, bringing beans into a high-traffic area in stores.

The trial delivered strong results, with sales increasing by 75% compared with the previous two weeks and volumes more than doubling (+115%). The number of customers purchasing Bold Bean Co. also doubled (+115%), while customers purchased slightly more products from the range per visit (+6%).



A further trial in September 2026 in another location in stores produced similarly strong outcomes, with sales increasing by 81% compared with the previous three weeks and by 182% year-on-year.

These results demonstrate that **making beans more visible and accessible alongside price promotions can encourage both trial and repeat purchases, helping more customers incorporate beans into everyday meal choices**. Building on these learnings, Sainsbury's is exploring further opportunities to give beans greater visibility in store.

Normalising Beans in Family Dining: Harvester's Approach to Healthier Choices

In 2025, Harvester joined the **Bang In Some Beans** campaign with a commitment to increase bean procurement by 15%. The business achieved this target within the first year through a series of simple but impactful menu changes.

Harvester increased the variety and visibility of beans on its iconic salad bar, incorporated more mixed beans into main meals and introduced additional bean-based side dishes. These changes have helped make beans a natural part of the guest journey, with **bean sides now accounting for 5% of all add-on sales**.



One of the greatest successes has been the children's menu, where Harvester introduced a Bean Quesadilla, Red Pepper & Bean Lasagne and a Mixed Bean Side. These additions have enabled the restaurant chain to offer more plant-rich options in formats that are familiar and appealing to families. To further support this, beans have also been featured as a hero ingredient throughout children's activity packs, helping to build awareness and positive perceptions among younger guests.

Harvester's experience demonstrates that meaningful dietary change can be achieved through practical menu innovation. By integrating beans into popular dishes, celebrating them in children's activity packs and making them accessible to families, the business has increased procurement, supported healthier choices and shown how restaurants can play a positive role in helping more people enjoy the benefits of eating more beans.

Using Behavioural Insights to Shift Food Choices in Schools

Drawing on insights from its successful *Eat Them to Defeat Them* campaign, Veg Power developed The Big Bean Boost, a schools-based initiative designed to increase bean consumption among children. Rather than focusing on nutrition or sustainability messages, the campaign used play, humour and storytelling to encourage children to engage with beans in a positive way.

Central to the campaign were the Big Bean Boost monster characters, whose enthusiasm for beans unlocked a series of humorous and deliberately pointless "superpowers". The characters were designed to capture children's imaginations and make beans feel exciting and familiar rather than something they were expected to eat because they were healthy.

The programme was informed by behavioural science evidence showing that children are more willing to try new foods when they are introduced through fun, repeated exposure and positive shared experiences. The campaign also encouraged parents and carers to role model bean consumption, helping to normalise beans within everyday family meals.

To support delivery, Veg Power provided schools with assemblies, lesson plans, classroom activities and participation stickers, alongside take-home resources for families including progress charts and reward stickers. In 2025, the programme reached **137,000 children across 479 schools**. Participating schools reported positive outcomes, with 79% saying pupils ate more beans, **69%** reporting that the programme encouraged families to eat more beans, and **98%** indicating they would like to take part again in 2026.

Using Beans to Enhance Nutrition in Mainstream Savoury Snacks: the Wall's story



From the outset, the objective of the Wall's High Protein range was to make healthier choices more accessible by improving two of the brand's most popular products: the Jumbo Sausage Roll and Scotch Egg. The focus was on delivering familiar, tasty, filling and convenient products that offered good value while introducing nutritional improvements.

Consumer insight showed that Wall's customers are often less engaged with health messaging, making it important to avoid alienating shoppers through overt references to plant-based ingredients, reduced meat content or beans. Instead, a "High Protein" positioning provided an effective platform for delivering healthier products while maintaining mainstream appeal.

For the Jumbo Sausage Roll, a blend of red and green lentils was incorporated alongside a new high-protein pastry and wheat protein. These recipe changes reduced the product's Nutrient Profiling Model (NPM) score from 18 to 9, while enabling both high-protein and source-of-fibre claims. At launch, 32% of sales came from shoppers who were new to the category, demonstrating demand for protein-enhanced versions of familiar savoury snacks.

A similar approach was applied to the Scotch Egg. Rather than relying solely on a protein claim, the recipe was improved by replacing a proportion of the meat with cannellini beans and switching to a wholemeal crumb coating. These changes doubled the fibre content of the product while maintaining its appeal.

The project reflects a broader ambition to help consumers make slightly healthier everyday choices. While not positioned as health foods, these products demonstrate how small recipe changes can improve nutritional outcomes and create a pathway towards more sustainable and healthier versions of well-loved favourites.

Using Behavioural Insights to Shift Food Choices in University Canteens

As part of Compass's commitment to increasing bean procurement, a six-week pilot study was conducted in a university catering outlet serving a mixed population of students, hopsital staff and faculty. The chosen site already offered a range of bean-based main meals and price incentives for plant-based options.

The study tested whether indulgent menu descriptions and targeted marketing could encourage customers to select bean-based dishes. Messaging focused on taste, enjoyment and positive health benefits rather than sustainability. A three-week baseline period was compared with a three-week intervention period, during which eligible bean dishes were renamed using more appealing language and promoted through printed materials and digital screens. No changes were made to recipes, pricing, portion sizes or menu placement.

Analysis included all hot-counter meal sales during the trial, alongside an assessment of the carbon impact of recipes sold. Results showed several encouraging trends. Bean-based main meals accounted for 44.2% of total main meal sales during the baseline period, rising to 57.8% during the intervention. The greatest increases were observed in the second and third weeks of the trial, suggesting that repeated exposure to the messaging may have influenced customer choices over time.

The study also identified a positive relationship between the availability of bean-based dishes and the proportion sold, highlighting the importance of menu availability alongside promotional activity. In addition, the average carbon footprint of meals purchased fell by 12.9% per serving.

Although the increase in bean sales was not statistically significant due to the short duration of the trial and variability in sales, the findings suggest that low-cost interventions such as menu language and targeted marketing could help shift purchasing behaviour, particularly when combined with greater availability of bean-based dishes.



What Businesses Can Do

1 Food businesses should set targets to sell more beans and join the Bang In Some Beans campaign as Keen Bean Pledgers.

2 Use blended or hybrid products when developing new products and dishes. A 50:50 lentil and beef bolognese sauce costs 22% less per serving than the cost of cooking traditional bolognese sauce (Food Foundation, 2025 – Bean Facts).

3 Lead with beans being tasty and delicious and create dishes and products that consumers want to eat.

4 Read the 'Unlocking Commercial Case for Beans' playbook for strategies and ideas of how to sell more beans.



The UK already produces around 800,000 tonnes of beans and peas annually, much of which is exported or used as animal feed

UNLOCKING THE WIDER OPPORTUNITY FOR BEANS

The campaign's first year provides a strong foundation, but the opportunity is much bigger. Looking at the wider food system, and to the year ahead, there are three key areas that, if unlocked, could provide multiple other benefits alongside increasing bean consumption:

1. **Growing the market for British grown beans**
2. **Improving public procurement**
3. **The updated School Food Standards**

Increasing bean production in the UK: the UK already produces around 800,000 tonnes of beans and peas annually, much of which is exported or used as animal feed, while importing around 500,000 tonnes of beans. These figures cover different varieties and uses. The opportunity is to connect what British farmers grow with food that people want to eat (The Food Foundation, 2026c).

Building this market means putting British-grown pulses into dishes that people recognise and enjoy. Examples include fava beans in Egypt's much loved ful medames, carlin peas in Lancashire's traditional parched peas, using marrowfat peas for mushy peas (Bramley, 2026), and split yellow peas in dal. These offer retailers, manufacturers, and caterers concrete ways to connect British crops with enticing food traditions (The Food Foundation, 2026c).

Turning these opportunities into dependable markets requires purchasing commitments and investment in cleaning, storage, and processing facilities. Alongside developing suitable varieties of other pulses, businesses can make greater use of crops already grown in the UK, including fava beans and peas. Using legumes in crop rotations can also support soil fertility and reduce reliance on synthetic nitrogen fertilisers, helping farmers manage exposure to volatile fertiliser costs (The Food Foundation, 2026c).

Public procurement offers one route to building demand. The public sector spends an estimated £5 billion annually on food and catering for settings including schools, hospitals, prisons, and the armed forces (The Food Foundation, 2026c). Government Buying Standards for food and catering services include mandatory requirements for central government procurers, alongside voluntary best practice recommendations. The latter include making a main meal using beans or pulses as its main protein source available at least once a week. Making this provision mandatory and extending its reach across public sector catering could help increase consumption through public purchasing (Defra, 2021).

Early projects illustrate how procurement can connect demand with UK growers. Give Peas a Chance worked with school caterers in Aberdeen to develop dishes using locally grown organic split peas, helping extend access to pea-based dishes to 350 schools and nurseries. BeanMeals served UK-grown Godiva and Capulet beans in six Leicestershire schools. These projects demonstrate practical routes for bringing British-grown pulses into school meals (The Food Foundation, 2026c).

Using Public Programmes to Strengthen Local Food Supply Chains

In summer 2026, Birmingham City Council worked with StreetGames, The Active Wellbeing Society, Our Food Trust, growers in Powys and Holiday Activities and Food (HAF) programme providers to create a new short supply chain: agroecologically grown produce travelled from farms in Powys to holiday programmes across the city.

Partners coordinated crop choices (including beans), advance orders, growers, packing, transport, training and on-the-ground activities, adapting quickly to different kitchens, group sizes and collection arrangements. That coordinated approach made the project efficient at a local scale while generating useful learning for future HAF delivery. It also gave small growers a more secure market, helping them plan, invest and expand.

For children and families in Birmingham, the supply chain became a route into healthier, more nutritious food. Through tasting boxes and hands-on sessions, young people explored seasonal produce, learnt how it is grown and tried unfamiliar foods. Importantly, some of the produce grown and eaten are beans, linking the supply project with Birmingham's Full of Beans work and its wider focus on affordable, nutritious diets.

HAF providers reported greater confidence in running food activities, while parents said children talked enthusiastically about the sessions and wanted to help more in the kitchen (Birmingham Public Health, 2026).



PHOTOGRAPH: ANDREW FOX/THE GUARDIAN

A new era of school food

Planned changes to England's School Food Standards will make pulses a more regular part of children's diets and help address the fibre gap.

TABLE 9

Planned pulse requirements in England's School Food Standards

Setting and start date	Planned requirement
Primary, September 2027	Pulses within or alongside every main menu option on at least one day each week. At least one vegetarian main item containing pulses on three days each week. Pulses will also count as a protein source as of 2027*.
Secondary, September 2027	Pulses within or alongside every main menu option at least once every two weeks. Pulses will also count as a protein source as of 2027*.
Secondary, September 2028	Pulses within or alongside every main menu option at least once each week.

Subject to Parliamentary approval. Baked beans do not count towards the specified pulse requirements.

*Pulses already count as a protein source under the existing standards. The planned changes would allow schools to offer pulses instead of meat on at least three days each week when these must currently be provided, giving schools greater flexibility to offer plant-based menus (Department for Education and Office for Health Improvement and Disparities, 2026).

Source: Department for Education and Office for Health Improvement and Disparities (2026).

Unit sales of **BEANS**, **PULSES**, **TOFU** and **TEMPEH** GREW BY **7.3%***

19% of people report eating beans at **LEAST 2X A WEEK** up 16% from last year

THE SCHOOLS' PROGRAMME:
- **137,310 UK PUPILS** took part
- **479 SCHOOLS**
- set to **DOUBLE** in Year 2

MORE THAN 1 IN 4 PEOPLE agree that the UK is talking about beans more

OVER 47 MILLION SOCIAL MEDIA IMPRESSIONS

- **450+** resource downloads
- **7,500+** website visits
- **750+** attendees at major campaign events

Sales of **sandwiches** containing beans increased by **20%**†

BANG IN SOME BEANS

YEAR 1 SUCCESSES

70 + INFLUENCERS & CAMPAIGN AMBASSADORS, with combined following of **8+ MILLION** shared 100s of RECIPES & TIPS and **500+** MEDIA HITS

MAJOR MEDIA PARTNERSHIPS
- **GOOD FOOD**
- **NETMUMS**
- **FIRST NEWS**

BRING BEANS TO PARENTS, CHILDREN, FOOD LOVERS

29 businesses have set a public target to sell more beans, **86%** have seen a **positive uplift** in sales, while **27%** already **achieved their targets**

JOIN THE CAMPAIGN

Bang in Some Beans podcast series 1: **3,500 downloads** "**Podcast of the Week**" in Radio Times and The Telegraph

*In the first half of 2026 compared to same period 2025. †This includes pulses and legumes.

Summary

The findings in this year's SOFI report paint two very different pictures of the UK food system. Progress on transparency has stalled. After years of incremental movement, many businesses are no further forward in setting targets and reporting on healthy food, fruit and vegetable, and plant protein sales. At a time when diet-related ill health, climate pressures and food insecurity continue to grow, this is a troubling signal. The government's continued delay in delivering mandatory healthy food sales reporting has created uncertainty and weakened momentum precisely when stronger leadership is needed.

The UK food system cannot afford another year of drift. The tools, evidence and examples already exist.

Yet there is another story running through this report. Across the food sector, businesses are demonstrating that change is possible. The first year of **Bang In Some Beans** has shown that when businesses set clear goals, measure progress and take practical action, consumer behaviour can shift. Beans sales are rising, businesses are innovating, and healthier, more sustainable choices are becoming more visible and appealing.

The challenge now is to move from pockets of progress to system-wide change.

Government must finally deliver the mandatory reporting framework it has promised, creating a level playing field and much needed clarity for industry. Industry must continue to lead where it can, setting public sales-based targets and reporting transparently on progress. Investors and civil society must maintain pressure for greater accountability.

The UK food system cannot afford another year of drift. The tools, evidence and examples already exist. What is needed now is the collective will to act. If government and industry seize this opportunity together, they can help build a food system that is healthier, more resilient and better equipped for the challenges ahead.



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