Plant-based meat health and nutrition

Consumer attitudes, needs, and purchase behaviors

November 2025

Antonina Vlasovaxx/Shutterstock.com

Table of contents

Background and methodology

Understanding "health" can strengthen the plant-based meat value proposition

There is a large market opportunity for plant-based meat. A 2024 GFI study found over two-thirds of U.S. consumers aged 18 to 59 are open to consuming plant-based meat. To capture this market, plant-based meat manufacturers must close gaps on product taste and price and deliver a compelling value proposition to motivate consumers.

Research shows that health is a key benefit consumers associate with many plant-based meats and a driver of choice. But what "healthy" means is complex and individualized. Gaining insight into consumers' health beliefs, needs, and behaviors can help refine the plant-based meat value proposition.

This research addresses key questions around health, including:

- Do consumers' health attitudes and perceptions match their behaviors?
- How do consumers evaluate health, and where do they get information?
- Is plant-based meat meeting consumer health expectations, and where are there gaps?
- What levers can be pulled to improve plant-based meat health perceptions and help drive adoption?

We followed a multi-step process to explore U.S. consumers' plant-based meat health and nutrition attitudes, needs, and behaviors

IDENTIFY QUESTIONS

01

Review GFI and external (academic, industry) research on health and nutrition and gather insights from plant-based meat **industry stakeholders.**

FORM HYPOTHESES

02

Conduct **qualitative consumer research** including virtual ethnography and focus groups to gain context and form hypotheses around health attitudes.

UNDERSTAND ATTITUDES

03

Survey U.S. consumers (via a household purchase panel) to understand claimed attitudes, needs, and behaviors related to key health and nutrition concepts.

TEST BEHAVIORS

04

Test claimed attitudes, needs, behaviors against **validated purchase data** to identify significant predictors of purchase behavior.

The qualitative consumer research included online ethnography and in-person focus group sessions

GFI conducted **qualitative consumer research** in Chicago and Los Angeles in August 2024. A total of 42 participants completed an online ethnography exercise and 35 were selected for focus groups.

In the **online ethnography**, participants:

- Answered questions on health
- Shared pictures and details of foods they had on hand at home
- Visited a grocery store and shopped the plant-based meat section
- Kept a daily food diary

In **focus groups,** participants:

- Further discussed their approach to healthy eating
- Shared perceptions of animal and plant-based meat and what they had heard about plant-based meat
- Described reasons for trying and continuing (or not) to eat plant-based meat
- Reacted to packaging from plant-based meat products on the market

The sessions were conducted by a professional focus group moderator.

Participants represented a range of demographics and met criteria for involvement in shopping and cooking in their household. A majority described their diet as omnivore or flexitarian; a few were vegetarians or pescatarians.

They were divided into groups based on plant-based meat consumption:

- **Frequent eaters:** eating monthly or more often
- **Occasional eaters:** eating at least once every 3-6 months
- **Lapsed eaters:** had not eaten in the past 6 months

The quantitative research surveyed and appended validated purchase data for current plant-based meat buyers and open non-buyers

Plant-based meat buyers

2,220 consumers who:

- Are verified past year plant-based meat retail purchasers[1]
- Self-reported they ate plant-based meat in the past year (i.e., did not only purchase for only family members or others)

Plant-based meat non-buyers (lapsed or holdout)

621 consumers who:

- Are aware of and at least somewhat open to eating plant-based meat
- Are verified to have not purchased plant-based meat in retail recently
- Self-reported they did not eat plant-based meat in the past year
- Includes 103 (15%) "lapsed" plant-based meat buyers, who purchased and ate two years ago but not in the past year. Their attitudes and behaviors closely resembled those who had never eaten.

[1] Circana purchase categories for inclusion in plant-based meat consumer group: meat alternatives, frozen meat alternatives, frozen seafood alternatives, single serve meat alternatives (subcategory), fresh tofu (subcategory); Purchases are recorded for the total household. Due to the limitations of targeting respondents in this panel, approximately 1% of the final consumer sample purchased and ate tofu but not plant-based meat. This group is referred to as plant-based meat consumers for simplicity throughout this report.

Participants from the **Circana Complete Consumer® Scan Panel** were surveyed in February 2025, and their household retail purchases in select food categories for the prior five years were appended.

Our reporting focuses on current plant-based meat buyers and highlights where non-buyers are different. Previous GFI research found there is room for plant-based meat to grow by both increasing frequency among current consumers and capturing new consumers who are open.

These groups share underlying attitudes and motivations (aligned with the consumer segment they belong to), so understanding current consumers can help us understand others.

Summary findings

Health plays an important but complex role in shaping consumer demand for plant-based meat

Consumers say health drives choice—and it does.

Health drives food choice for many consumers, especially plant-based meat buyers. Healthy eating is both reality and aspiration—not every item in every meal is (or has to be) healthy—but consumers who say they care about health spend less on "unhealthy" foods and spend more on "healthy" foods than others.

While taste and price are critical to getting into the consideration set, consumers also need compelling reasons to switch to plant-based meat, and for many that reason is health. Those who think plant-based meat is healthy spend more on it than those who don't.

Plant-based meat is seen as "somewhat" healthy.

Overall, many consumers view plant-based meat as "somewhat" healthy. Strong health associations include high protein, low fat and cholesterol, and free of antibiotics/hormones. However, perceptions differ by category. Plant-based beef is viewed as healthier than conventional beef. Plant-based chicken is viewed as less healthy than conventional chicken.

Nutrition labels and ingredients shape perceptions.

Health cues come from ingredients, processing, and nutrient content, but "freshness" dominates for meat, whether plant-based or conventional. Packaging design and external sources (e.g., social media) are also influential.

Relative to nutrient levels consumers expect, many plant-based meat products are high in protein and low in saturated fat. But many are higher in sodium and don't contain as much fiber as consumers expect. Nutrient evaluation is not straightforward—consumers may look at percent daily values, absolute quantities, claims, or other sources—and expectations vary depending on the benchmark.

Health perceptions can be heavily impacted by ingredients for those reading labels. Processing concerns are related—many consumers assess whether products are processed based on the length and content of ingredient lists. Some consumers feel plant-based meat is processed, however those who say they avoid processed foods don't buy less plant-based meat (but do buy less junk food like chips, candy, etc.).

Health is not one-size-fits-all, and different strategies may be needed for different consumer targets and products

Improving health perceptions appears likely to have the biggest impact on current buyers in the near term.

Plant-based meat buyers report more health-conscious attitudes and info-seeking behaviors than non-buyers and are more likely to indicate that further improvement on key health attributes would motivate them to eat plant-based meat more. Current buyers are estimated to eat plant-based meat two to three times a month on average, leaving significant room for growth if their demand is better met.

Non-buyers are much more concerned about taste and price, and improvements on these fundamental attributes are needed to drive trial. However, once those attributes are delivered, non-buyers are interested in many of the same health benefits as current buyers.

This research illuminates ways brands may be able to better align with consumer health expectations.

Consumer segments provide a framework to prioritize.

While health is a key part of the plant-based meat value proposition for many, the specifics vary. For example, some want to manage long-term health and avoid issues like heart disease, others look closely at specific nutrients and ingredients, and some prioritize protein. Selecting a target consumer segment can help identify which health attributes might be most effective to address. To learn more, check out GFI's plant-based meat consumer segmentation.

Priorities may also differ by product type.

Plant-based meat products are often compared to conventional equivalents (e.g., plant-based beef to conventional beef), meaning the benchmark for health may differ. For plant-based beef, consumers who feel it performs "very well" in terms of fewer ingredients and no antibiotics/hormones spend more in the category. For plant-based chicken, consumers who feel it does "very well" on being lower in fat and cholesterol and high in fiber spend more in the category.

Improving health perceptions: Messaging and formulation opportunities exist around key nutrients

Nutrient opportunities

Reinforce protein: protein is the top nutrient consumers seek from meat, and those who believe plant-based meat delivers spend more. Most plant-based meat products contain protein at or above levels consumers say they want, though there is a *perceived* gap versus conventional meat. This creates a messaging opportunity to build credibility as a meat alternative. Further exploration of the impact of increasing protein quantity may also be warranted, especially if targeting consumer segments focused on protein.

Highlight lower saturated fat: low-saturated fat ranks high in importance to consumers and strongly correlates with spend. Many plant-based meat products fall below consumers' self-described "low" thresholds, unlike conventional meat, but plant-based meat doesn't always get credit. This creates an opportunity to highlight differentiation. Cholesterol is also a nutrient of concern for many consumers and, along with saturated fat, can support messaging around heart health benefits that are important to many consumers.

Elevate fiber: gut health (for which fiber is a key nutrient) is among consumers' top health priorities but is not always top of mind in this context as consumers don't expect this benefit from meat. Some consumers recognize plant-based meat as a better fiber source than conventional meat, but many plant-based meat products do not meet consumer expectations for fiber quantity when framed as grams or percent daily value. Messaging on the fiber and gut health benefits of plant-based meat may be effective, as may evaluating opportunities to increase fiber content.

Evaluate sodium content: low-sodium has high importance to consumers, and plant-based meat has a large gap on perceived and actual delivery. Consumers often cite high sodium as a barrier to eating more plant-based meat yet lack clarity on what a desirable level is, and they often overlook sodium added when cooking conventional meat. Plant-based meat reformulation (without sacrificing taste), possibly supported with consumer education, could help close this gap.

Improving health perceptions: Ingredients are key, and claims and packaging can also play a role

Ingredient opportunities

Ingredient count matters: consumers draw quick conclusions based on ingredient list length. Ten ingredients appears to be a key threshold—most consumers say they prefer plant-based meat with fewer than ten ingredients and spend drops off as counts rise. Simplifying formulations can help align with these expectations.

Specific ingredients have an impact: consumers are positive or neutral on many common plant-based meat ingredients, but a few (e.g., emulsifiers, GMOs) can raise concerns for those reading labels. Ingredients seen as "red flags" by consumers can readily signal a product is unhealthy, while adding ingredients with favorable associations can create an overall positive perception.

Processing opportunities

Conflicting attitudes: many consumers say they avoid processed foods but also find them acceptable in moderation. Those who report avoiding processed foods spend the same on plant-based meat as those who don't avoid processed foods.

Processing is also about ingredients: consumers often judge whether a food is processed based on ingredient list length and familiarity, making processing and ingredient concerns intertwined. In addition to evaluating ingredients in reformulations, reframing narratives around processing and educating consumers about how plant-based meat is made can demystify it and may be especially powerful in motivating non-buyers to try it.

Other opportunities

Leverage "no hormones/antibiotics": antibiotics and hormones are a top consumer concern, and those who believe plant-based meat delivers on being free of them spend more than average. Continuing to leverage this benefit is an opportunity.

Optimize packaging: packaging imagery, serving suggestions, and even colors can shape health perceptions. Visual cues of freshness and quality can do double duty, signaling both health and better taste.

An objective assessment of the nutritional profile of plant-based meat provides further context on opportunities

The nutritional profile of plant-based meat has several documented advantages over conventional meat. Plant-based meat is lower in calories and saturated fat, free from cholesterol, is a good source of fiber, and is associated with positive health outcomes.

While plant-based meat has nutritional advantages, there are ways in which its nutritional profile could be further improved. Additionally, opportunities have been identified for consumer education, policy action, and further research around the health benefits of plant-based meat.

To learn more, check out GFI's resource
The nutritional profile of plant-based meat: Strengths and opportunities

ArxOnt/iStock.com

The role of health

Health importance

Health signals and information sources

Health importance

Key findings

How important is healthy eating to consumers?

Pixel-Shot/stock.adobe.com

Healthy eating is a priority, especially for plant-based meat buyers.

Plant-based meat buyers express more willingness to change habits, pay more, and invest time to eat healthy than non-buyers, but the overall health goals of both groups are similar.

Healthy eating intentions are reflected in purchase behavior.

Those who agree that health is their most important consideration when deciding what to eat spend less on average on "unhealthy" foods (e.g., chips, soda) and more on "healthy" foods (e.g., fruits, vegetables) as well as plant-based meat than those who don't agree healthy eating is a priority.

However, consumers don't *always* do what they say when it comes to healthy eating.

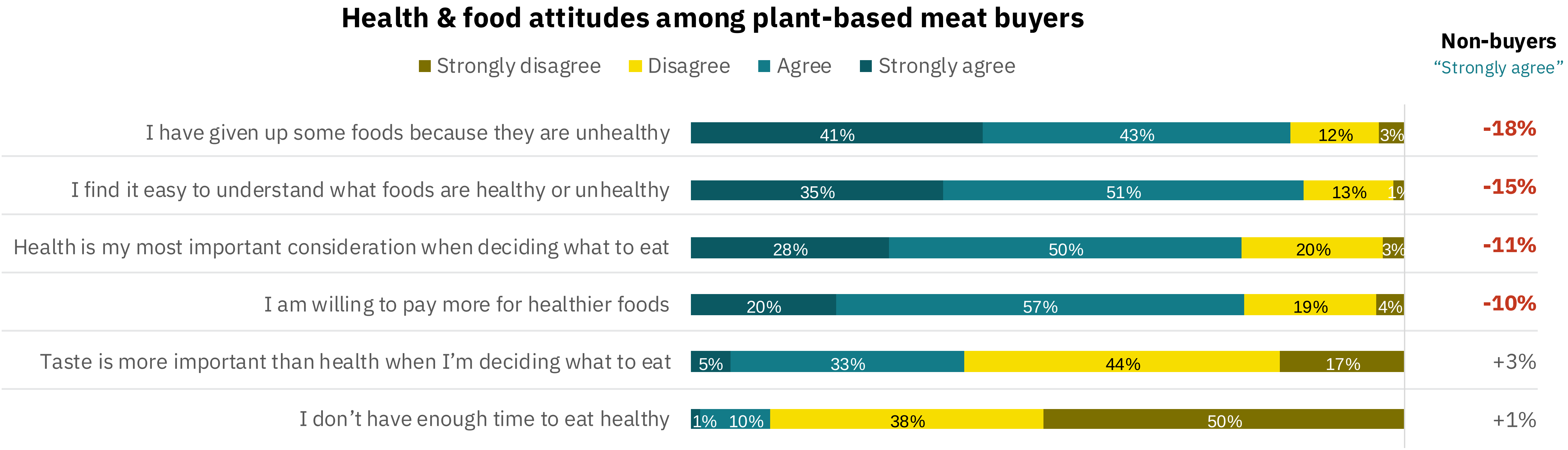
Even health-motivated consumers do buy "unhealthy" foods. Consumers admit decisions around healthy eating are complex, and sometimes health is not a top consideration.

Consumers may deprioritize health in certain occasions or give themselves leeway if they make another healthy choice (e.g., exercising). They feel a tradeoff must be made with benefits like taste, convenience, or tradition and often talk about looking for "balance."

While health is important, price and taste are table stakes for food choices.

What are consumers' key attitudes around healthy eating?

Health is an important consideration in food choices for consumers, especially plant-based meat buyers who express more willingness to change habits and have higher confidence in their health knowledge than non-buyers. While taste and price are top of mind in food choices, many are willing to sacrifice somewhat on these attributes to make healthier choices. A majority of consumers strongly agree/agree they are willing to pay more for healthier foods, while more than half strongly disagree/disagree that taste is more important than health.

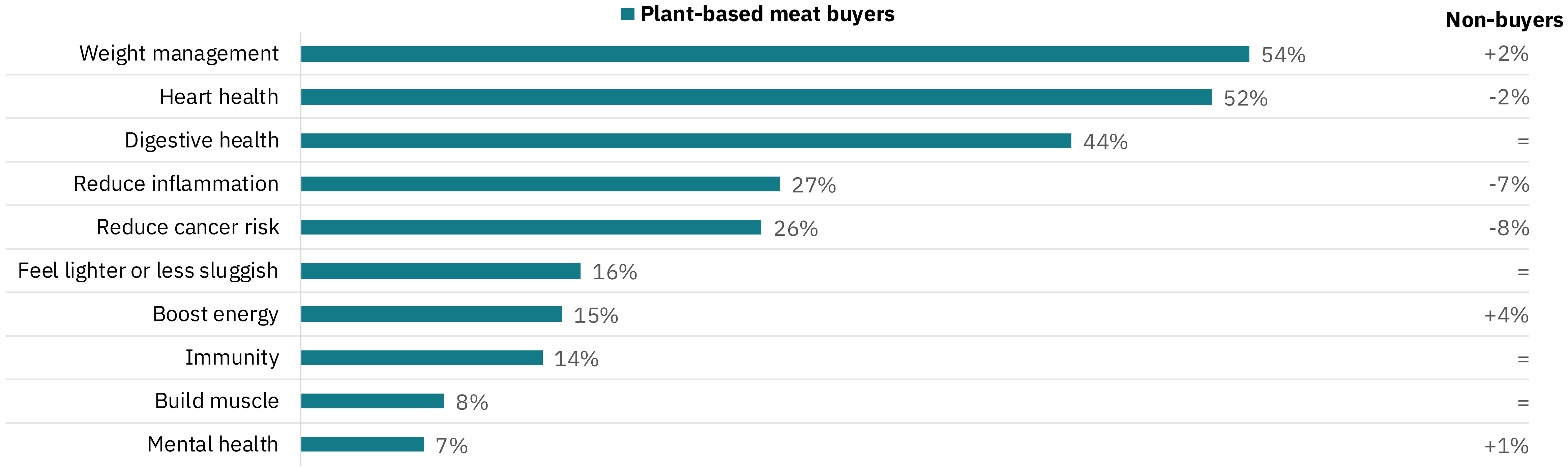


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
For each of the following, how much do you personally agree with these statements? *(Select one for each)*

What health benefits do consumers want from their food?

Consumers prioritize weight management, heart health, and digestive health, which may present unique opportunities for plant-based meat, which tends to be lower in saturated fat and cholesterol and contains fiber. These top health needs are common among both current plant-based meat buyers and non-buyers.

Top health benefits considered when choosing foods

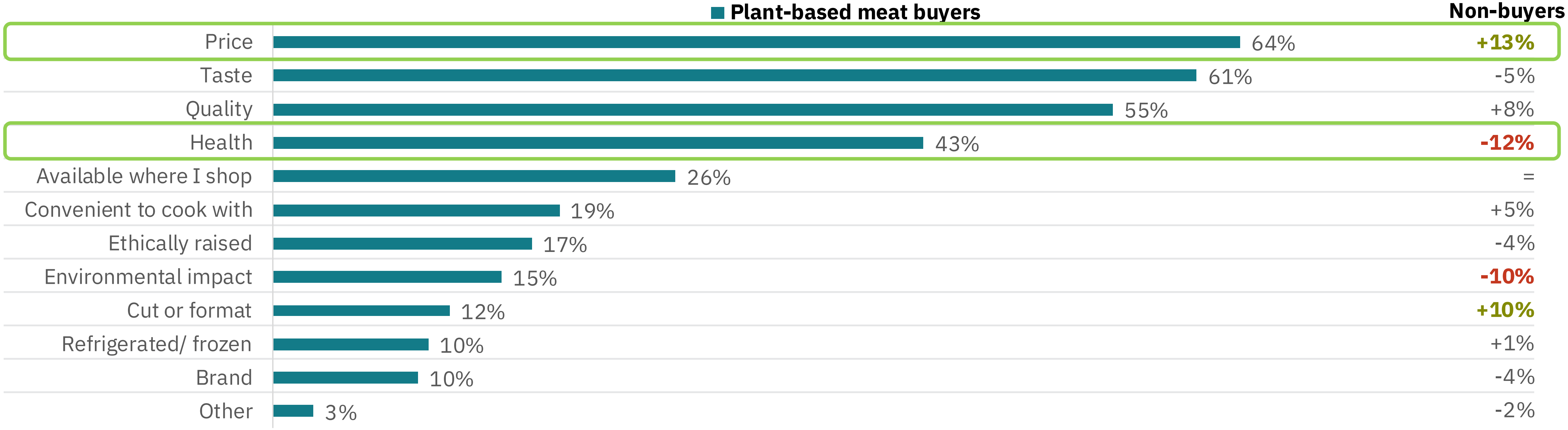


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
What are the top benefits you are looking for when making food choices based on health? (*Select at least 1 and up to 3*). Average selected = 2.4

How do consumers prioritize health versus other factors in meat choice?

Although health is a top priority for plant-based meat buyers, price and taste are still more important overall in their choices. Non-buyers are more motivated by price and less by health, although health is still a top consideration. They are also more concerned with cut/format of the meat they buy, which could be a limitation for plant-based meat today.

Top attributes considered when choosing meat



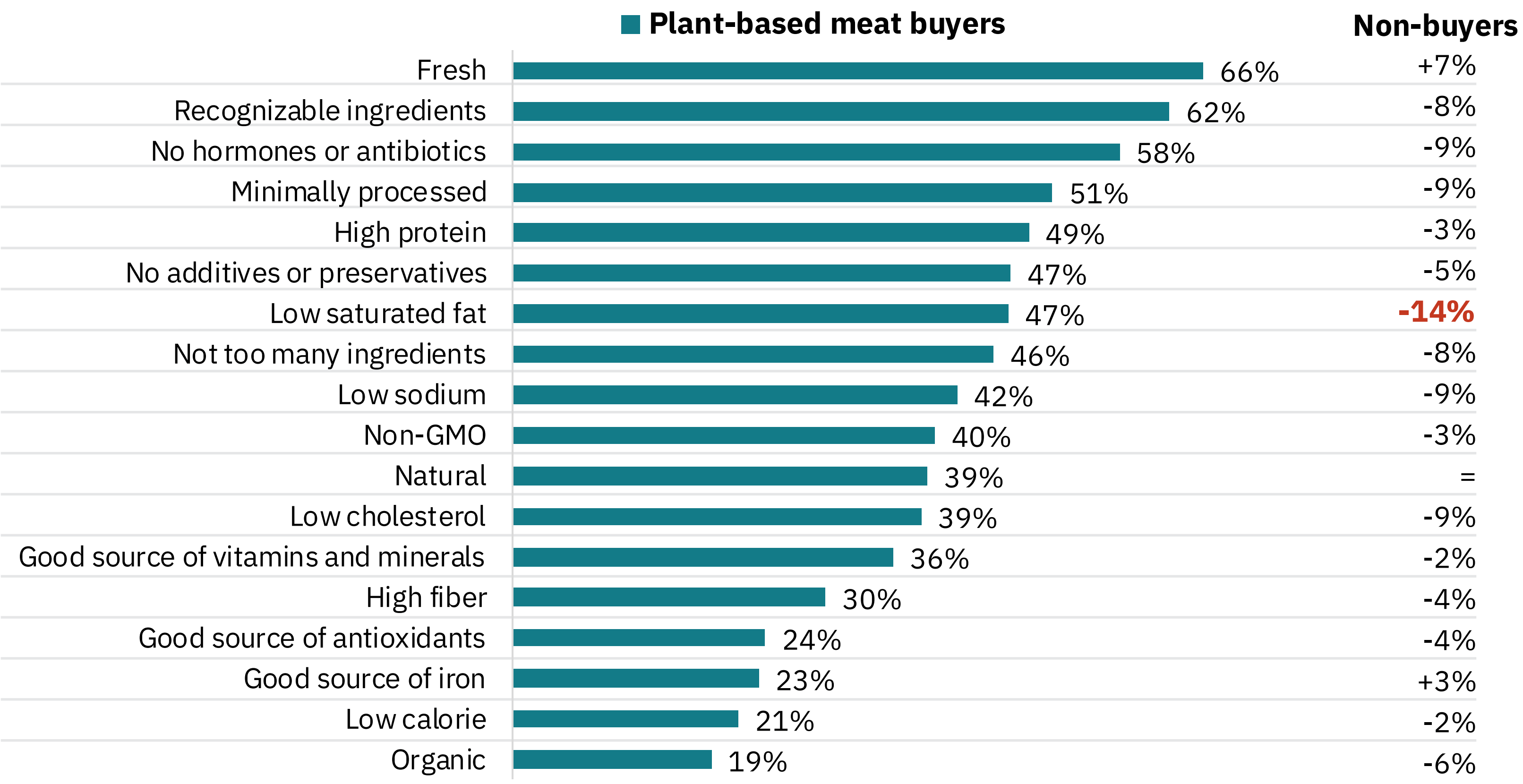
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Think about when you are shopping for meat, conventional and/or plant-based, which of the following are most important in your decision of which meat products to buy? (*Select at least 2 and at most 4 attributes)*

Which specific health attributes are consumers looking at when choosing meat?

Plant-based meat buyers and non-buyers prioritize freshness and recognizable ingredients when choosing meat. Other top criteria include not containing hormones or antibiotics and being high-protein.

It's important to interpret these rankings in the context of choosing meat. Protein may be lower than it would be as an overall health priority (i.e., consumers already expect a certain amount of protein in meat and may evaluate it less closely once in the category). On the other hand, fiber may be lower priority because it is not an attribute consumers expect from conventional meat.

"Very important" health attributes when choosing meat



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
When you are choosing meat products to buy, conventional and/or plant-based, how important are the following to you?

How often do consumers say they act on their healthy eating intentions?

While health is important, in qualitative research, all but a few consumers admitted they don't currently eat as healthy as they would like "all" of the time. A majority suggested they achieved this "some" to "half" of the time. Most expressed intent, or at least desire, to be healthier in the future.

"Health doesn't have to be an every single day thing."

Consumers feel that eating healthy often requires a tradeoff with other important benefits like taste, convenience, social dynamics, and traditions, and they seek "balance."

They also describe choices around healthy eating as being dependent on the context—health may be a more salient consideration on some occasions (e.g., weekday breakfast) than others (e.g., Friday dinner). Or, they give themselves leeway to make a less healthy food choice if they make up for it another way (e.g., eat very healthy another time, exercise).

Reducing perceived tradeoffs between health and other benefits and targeting more health-focused eating occasions may present unique opportunities for plant-based meat to capture more occasions.

16%

Of U.S. adults say they "always" stick to a healthy diet vs. 82% who report healthy eating is important

Morning Consult

65%

Of plant-based meat consumers agree they "eat really healthy at some meals to make up for eating less healthy at others"

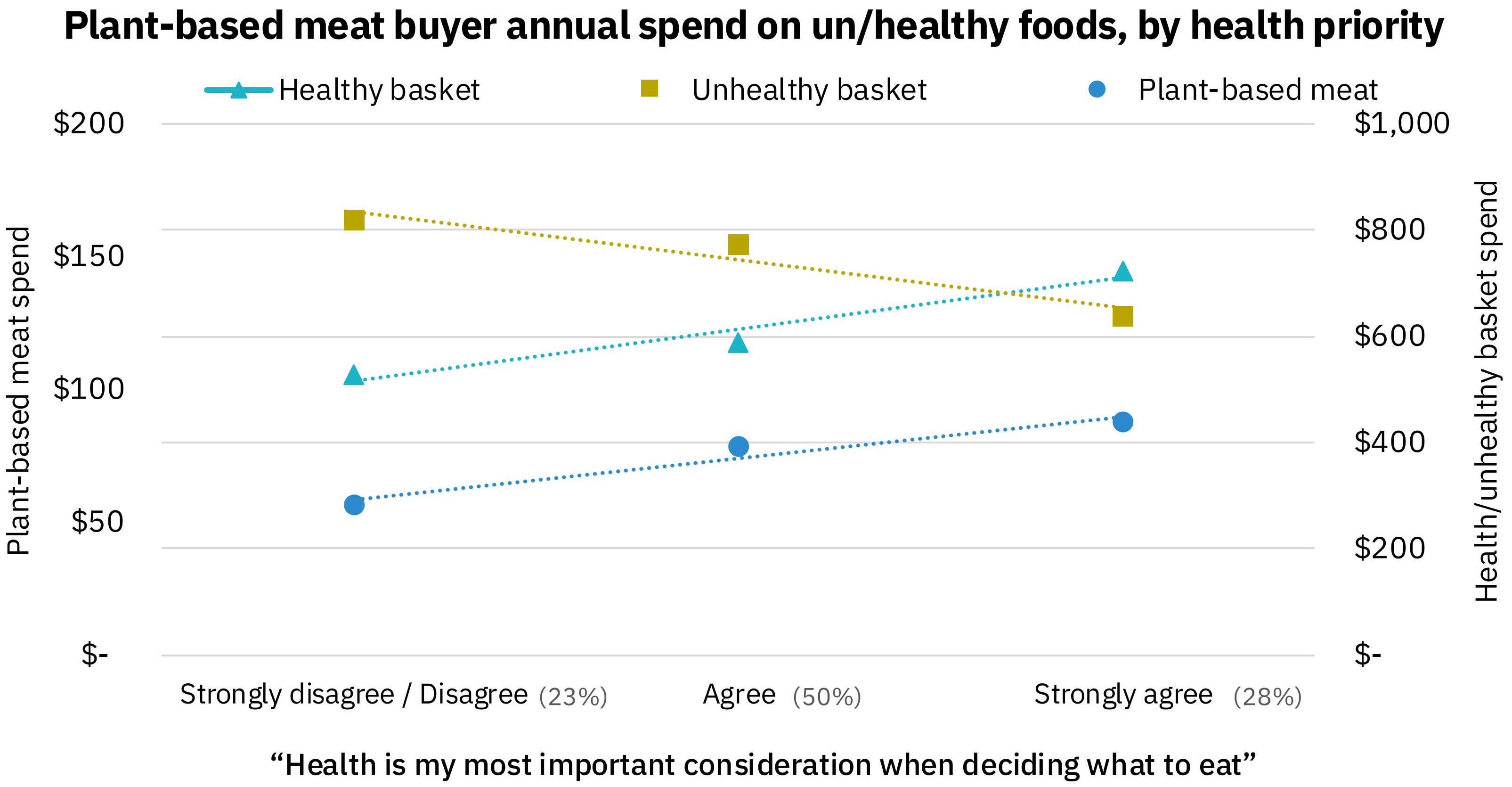
GFI

Focus groups and digital ethnographies with n=42 frequent/occasional/lapsed plant-based meat consumers in Chicago and Los Angeles, 2024
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Morning Consult "The State of Food and Beverage" 2022

Do people's purchase patterns reflect how much they value health?

For a basket of "healthy" foods like fruits and vegetables, consumers who strongly agree that health is their most important consideration when choosing food spend more than those that strongly disagree. They still buy "unhealthy" foods like sweet baked goods, chips, and soda but buy less than those who say they don't focus on health. This is similar for plant-based meat buyers and non-buyers.

Plant-based meat buyers who say health is their most important consideration spend more on plant-based meat, suggesting that purchasers treat it like other "healthy" foods.

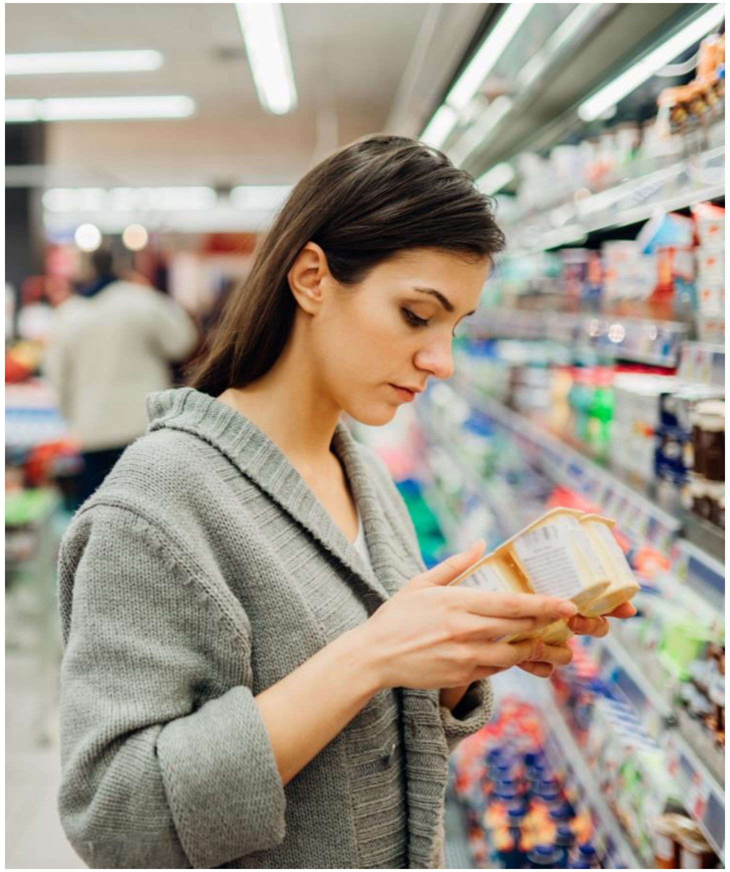


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
X: For each of the following, how much do you personally agree with these statements? Health is my most important consideration when deciding what to eat / Y: Avg. per-year spend past 2 years per category among past year meat alt. consumers
Y: Circana, Complete Consumer® Scan Panel, 260 weeks ending April 2025. Categories: Plant-based meat = Refrigerated, Frozen & Single Serving Meat Alternatives / Healthy basket = Fresh & frozen vegetables & salads; Fresh & random weight fruit; Fresh, dried, baked, & refried beans; Fresh, jarred, & canned mushrooms; Fresh tofu / Unhealthy basket = Candy (chocolate & non-), Brownies, Cakes, Cookies, Donuts, Muffins, Pastries, Pies, Frozen Novelties, Frozen Potatoes & Onions, Salty Snacks, Frozen breakfasts/pastries, Dry dinner mixes with and without meat; Packaged, prepared, unsliced, presliced, & deli-service lunchmeat; Bacon; Soda. Avg. annual $ spent per-category, across past 2 years.

Health signals and information sources

Key findings

How do consumers determine what food is healthy?



eldarnurkovic/stock.adobe.com

Packaging plays an important role in shaping health perceptions.

A majority of consumers say they attend to on-pack health information like nutrition labels, ingredient lists, and nutrition claims. Plant-based meat buyers report being even more likely to refer to these sources than non-buyers.

When engaging with plant-based meat products, consumers also describe being influenced by packaging design and graphics. Images of the product that look “natural” or show healthy preparations help strengthen associations with health. The appearance of the product through the packaging (when visible) is also impactful.

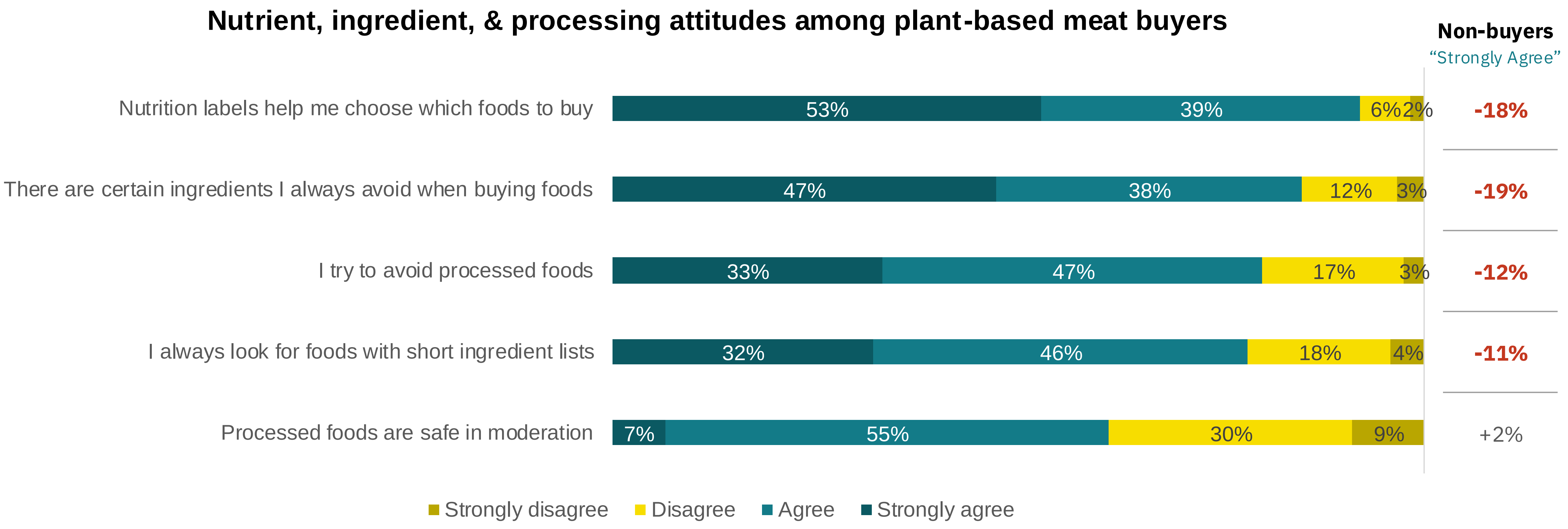
Internet information is prevalent and influential, even when questioned.

Many consumers admit to being exposed to health and nutrition information online (particularly on social media). While the reliability of this information is often questioned by consumers, it does impact perceptions and behaviors.

Shaping positive narratives and countering misinformation on social media may be an important part of communicating health benefits to consumers.

What are consumer attitudes around evaluating food health?

A majority of consumers claim to pay attention to nutrition labels and ingredients and to avoid foods seen as “processed” when deciding what to buy and eat. Plant-based meat buyers are even more likely to say they follow these behaviors than non-buyers.



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
For each of the following, how much do you personally agree with these statements? *(Select one for each)*

Where do consumers *claim* to look to determine whether plant-based and conventional meat products are healthy?

90% of plant-based meat buyers claim to get health information about meat products (plant-based or conventional) from **“ingredient lists”** or **“nutrition facts”** on-pack. *Non-buyers are slightly less likely at* ***77%****.*

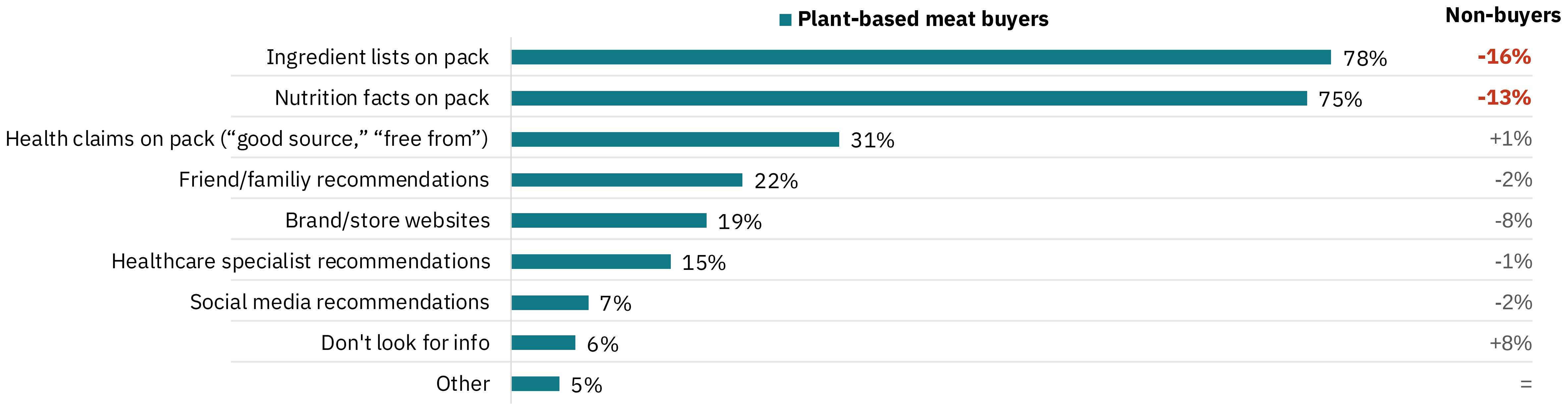
45% of plant-based meat buyers claim to get health information from other sources tested: **brand/store websites**, **recommendations** from people they know, from **health professionals**, or from **social media**. *Non-buyers are slightly less likely at* ***37%****.*

Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
Still thinking about meat, conventional and/or plant-based, which sources do you regularly use to get information on how healthy or nutritious specific products are?

What specific sources do consumers reference for product health information?

Plant-based meat buyers are by far most likely to look at ingredient lists and nutrition facts on pack. Very few claim to look to other sources beyond the package. Top sources are consistent for non-buyers, although they are more likely to report leveraging fewer (or no) sources.

Sources used to get health and nutrition information about meat products (conventional or plant-based)



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Still thinking about meat, conventional and/or plant-based, which sources do you regularly use to get information on how healthy or nutritious specific products are? Select all that apply. *Avg. selected = 2.5*

How do consumers talk about influences on their health perceptions?

Even when they don't seek it out, many consumers admit to being exposed to health and nutrition information online. In qualitative research, social media and internet searches were commonly mentioned sources of health information.

Many acknowledged this information can be inaccurate, inconsistent, and generally unreliable. While they often questioned health information from online sources, they still let this information inform their perceptions and choices.

For some, family and friends were also top-of-mind influences when it came to health. This was relatively more common among young consumers who were still heavily influenced by their parents and how they grew up. Occasionally, doctors or other "experts" like nutritionists or personal trainers were mentioned, and these were considered more reliable sources.

"There can be so much misinformation out there... It can be hard to parse through what is accurate."

54%

Of U.S. adults reported seeing food or nutrition content on social media in 2024 (vs. 42% in 2023)

International Food Information Council

53%

Of those who have seen food or nutrition content on social media trust it "a little"

International Food Information Council

Focus groups and digital ethnographies with n=42 frequent/occasional/lapsed plant-based meat consumers in Chicago and Los Angeles, 2024
International Food Information Council, 2024 Food & Health Survey

How does packaging design play a role in conveying health?

Packaging has a multifaceted role in communicating health.

In qualitative research, consumers shared reactions to packaging of commonly available plant-based meat products both in their regular grocery store and in a focus group setting.

Packaging graphics impact health perceptions.

Packaging with images of the product that looked natural or showed healthy preparations (e.g., grill marks, served with vegetables) helped build health associations. It also helped counter concerns about taste and preparation.

Product impressions on shelf were also driven by the appearance of the product through the packaging (when visible). Off-putting product textures or colors were noted frequently (e.g., “bland, gray, imitation,” “looks like paste,” “pale and sad,” “reminds me of cat food”) and often negatively impacted perceptions on key attributes consumers seek like fresh and minimally processed.

Specific front-of-pack information stands out.

Consumers gravitated most toward claims around **protein content**, (number of grams), **fat reduction**, and **no hormones/antibiotics**. Reactions were limited to claims on existing products—no new claims were tested.

Consumers widely <u>understand plant-based meat is made from plants and can identify key ingredients</u>. However, front-of-pack information or imagery highlighting specific plant ingredients also generated positive appeal, linking to the source and reducing impressions of the product being processed.

Focus groups and digital ethnographies with n=42 frequent/occasional/lapsed plant-based meat consumers in Chicago and Los Angeles, 2024

Plant-based meat health perceptions

Health perceptions of plant-based and conventional meat

Health as a purchase driver

Health perceptions of plant-based and conventional meat

Key findings

How healthy do consumers think plant-based meat is?

Plant-based meat is seen as generally healthy, but...

Research consistently shows that consumers perceive plant-based meat to be a healthier option. A more granular evaluation reveals the story is complex. A majority of consumers rated plant-based beef and chicken as “somewhat healthy.”

Frame of reference is important.

Plant-based beef and chicken were rated as healthier than conventional beef, on average. However, both plant-based beef and chicken were less likely to be rated as “very healthy” than conventional chicken. Many consumers believe that conventional meat is a necessary part of a healthy diet.

Plant-based meat wins on some health attributes but has room to improve on others.

Plant-based meat is rated highly (and has strong unaided associations) on being high-protein, low-fat, low-cholesterol, and containing no hormones or antibiotics, all top health priorities for consumers.

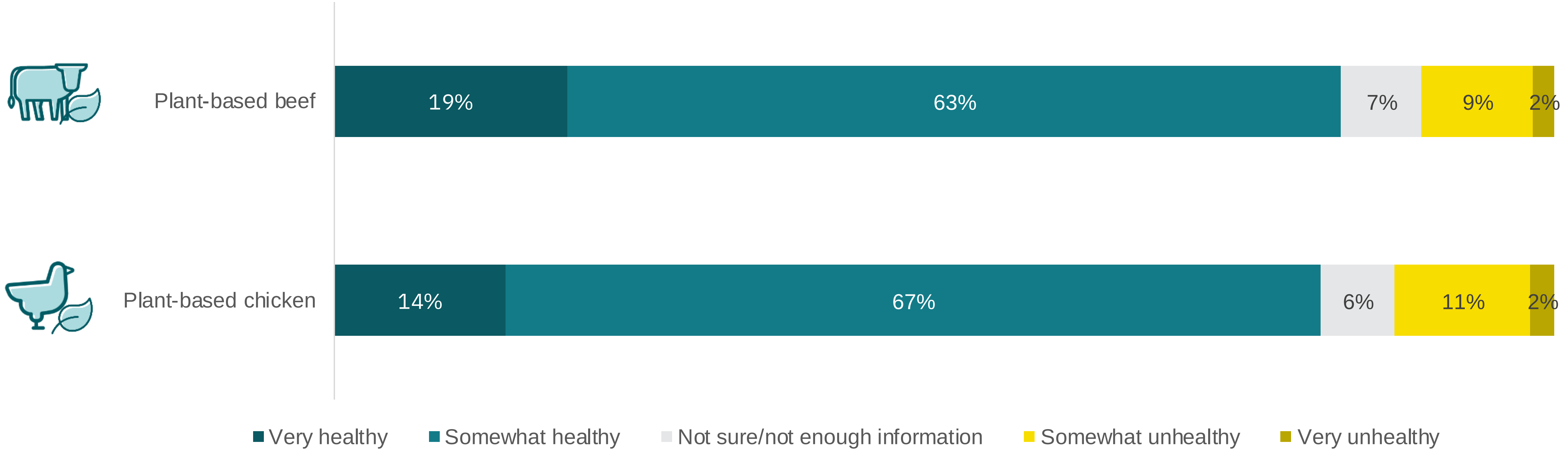
While plant-based meat gets credit for protein, it is rated lower than conventional meat.

Plant-based meat has large perceived gaps on other important attributes like being fresh, having recognizable ingredients and no additives, and being minimally processed.

How healthy do consumers think plant-based meat is?

Plant-based meat is seen by a majority consumers who eat it as “somewhat healthy.” A smaller portion of consumers, around one in five, see it as “very healthy.”

Health rating of plant-based meat, among plant-based meat buyers

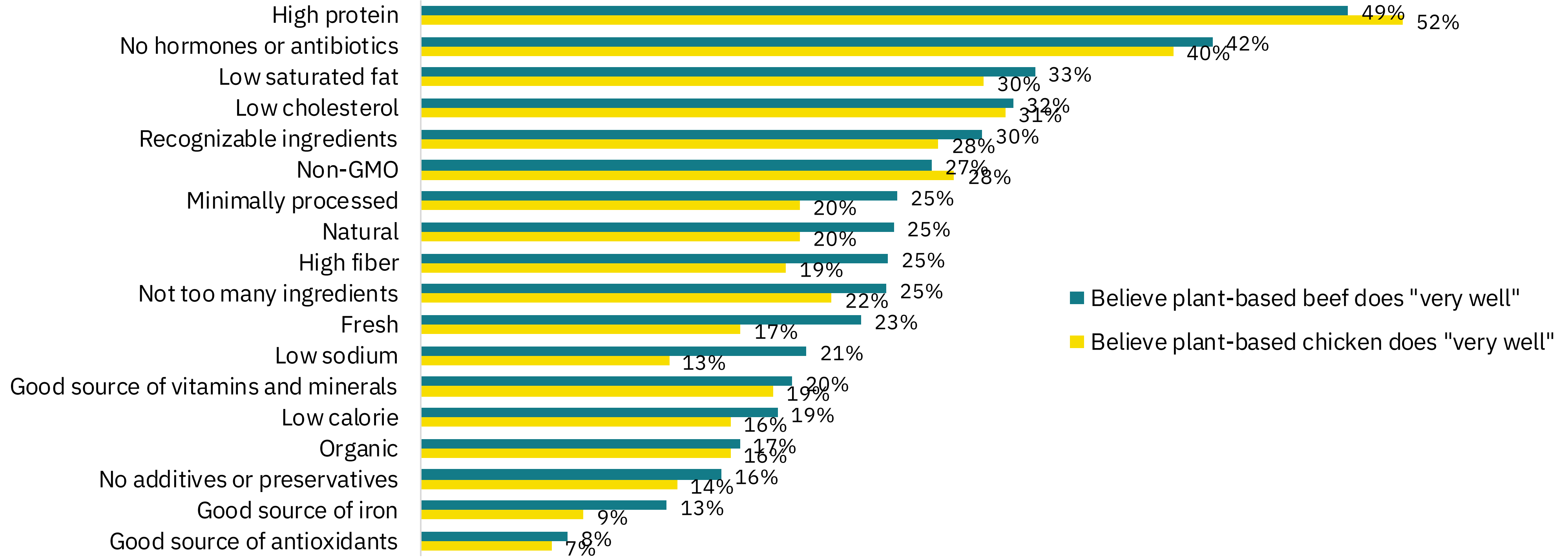


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
How healthy do you think [product] is? Plant-based beef like Beyond Meat or Impossible Burger / Plant-based chicken like Impossible nuggets or Gardein chick’n / Conventional ground beef / Conventional chicken breast

What health attributes do consumers associate with common types of plant-based meat?

Most plant-based meat buyers see it as high protein, free of hormones/antibiotics, and low in commonly avoided nutrients like saturated fat and cholesterol. Plant-based beef is rated slightly higher than chicken on some attributes like being minimally processed and natural.

Benefits plant-based beef and chicken deliver “very well,” among plant-based meat buyers



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025

Thinking about the [Plant-based beef like Beyond Meat or Impossible Burger/ Plant-based chicken like Impossible nuggets or Gardein chick’n] you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? (*Select all that apply*)

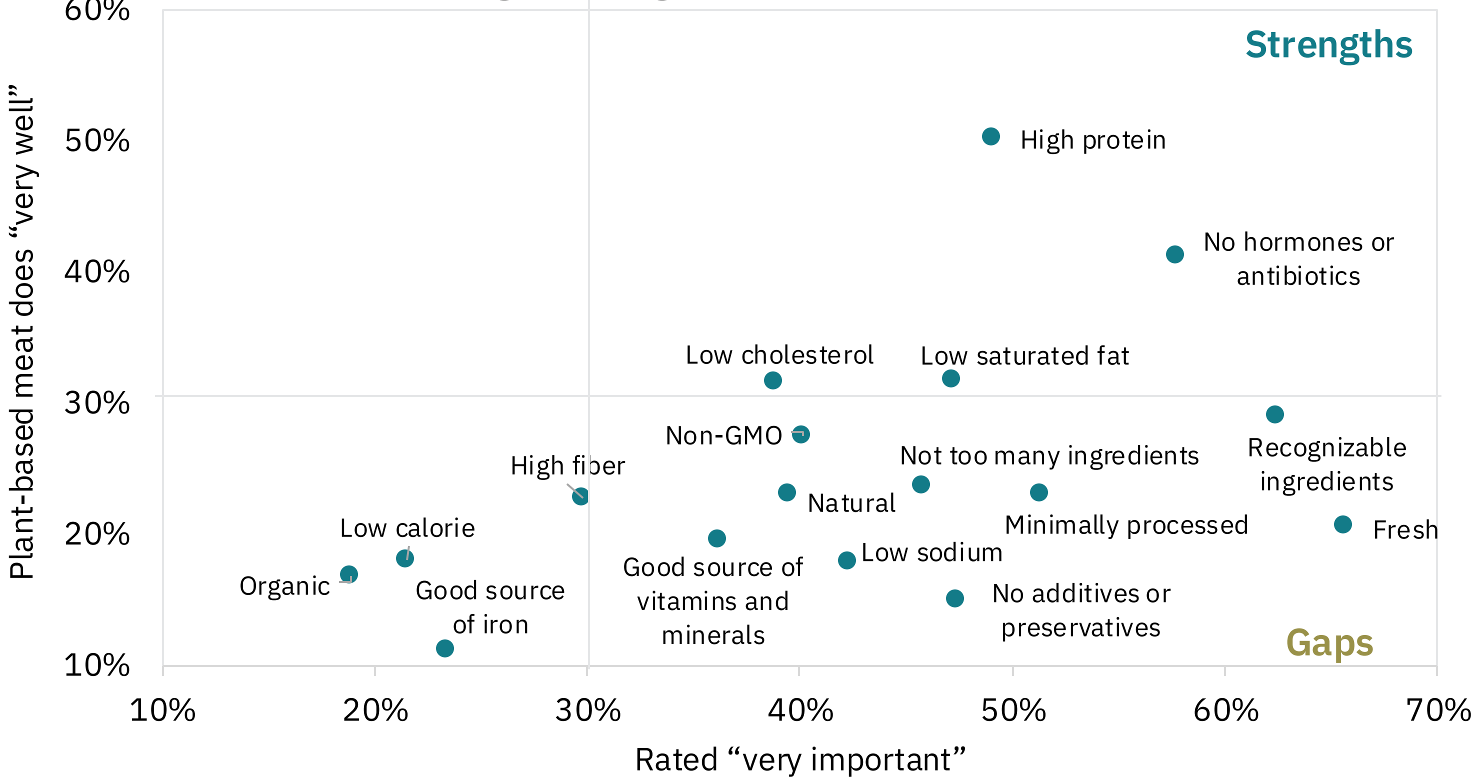
Which consumer health needs are strengths and gaps for plant-based meat?

Plant-based meat's biggest gaps relative to buyers' needs are being fresh, having recognizable and not many ingredients, and being free of additives and preservatives.

On the other hand, having no hormones or antibiotics and being low in fat and cholesterol are strengths. Many also give plant-based meat credit for being high in protein, although ratings are lower than for equivalent conventional meat types.

While high-fiber appears as a lower consumer priority in the context of meat (where consumers don't expect it), there may be opportunity to educate consumers about the benefit of getting fiber from plant-based meat.

Attribute importance versus average plant-based meat rating, among plant-based meat buyers



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
When you are choosing meat products to buy, conventional and/or plant-based, how important are the following to you?
Thinking about the [Plant-based beef like Beyond Meat or Impossible Burger/ Plant-based chicken like Impossible nuggets or Gardein chick'n] you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? (*Select all that apply*) weighted average of n=1,037 who answered about plant-based beef and n=704 who answered about plant-based chicken.

How do potential tensions between perceived health and taste impact plant-based meat?

In qualitative research, some consumers referenced a tension between health and taste. As products become tastier, there was a sense they might be less healthy. Conversely, healthy products sometimes came with the perception that taste might suffer.

However, survey data shows that, on average, plant-based meat buyers tend to feel plant-based meat products are becoming both tastier and heathier over time. Many non-buyers also see improvements, although they are most likely to say there has been no change on either dimension.

Balancing taste and health may require close attention in both product development and consumer messaging.

Plant-based meat buyers

Is plant-based meat getting healthier?	Much less	Less	No change	More	Much More
Much more	0%	0%	1%	3%	11%
More	0%	1%	4%	16%	9%
No change	0%	2%	19%	14%	6%
Less	0%	2%	4%	4%	2%
Much less	1%	0%	1%	1%	1%

Non-buyers

Is plant-based meat getting healthier?	Much less	Less	No change	More	Much More
Much more	0%	0%	1%	1%	0%
More	0%	2%	12%	13%	2%
No change	1%	5%	33%	11%	1%
Less	1%	3%	9%	2%	0%
Much less	1%	0%	1%	0%	0%

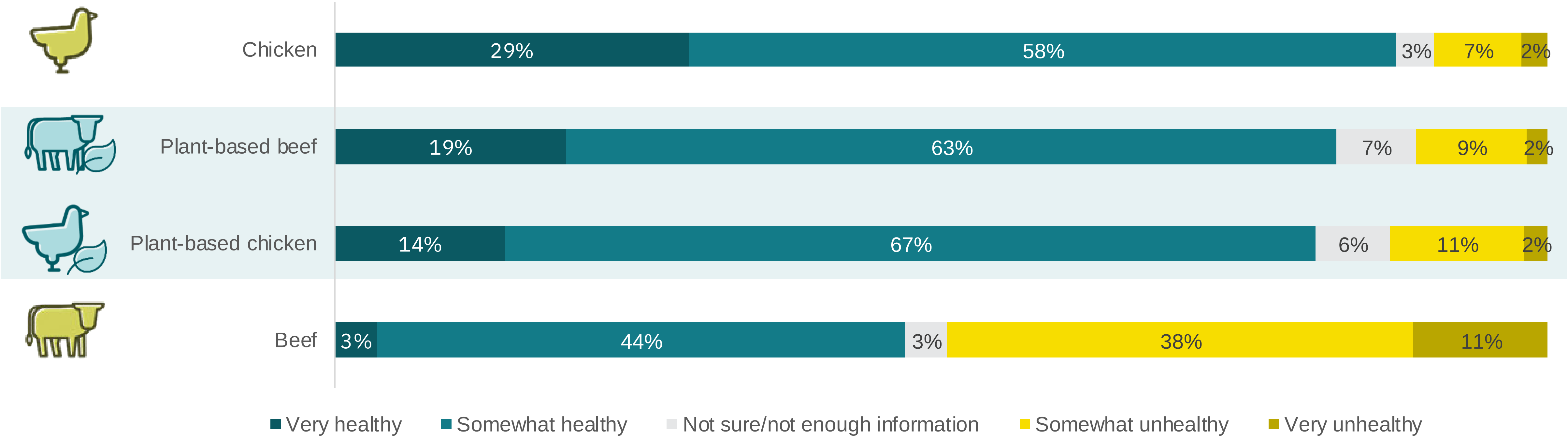
Is plant-based meat getting tastier?

Focus groups and digital ethnographies with n=42 frequent/occasional/lapsed plant-based meat consumers in Chicago and Los Angeles
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Think back to when you first tried plant-based meat. Since then, have your feelings about plant-based meat changed?

How do plant-based meat health perceptions compare to conventional meat?

Plant-based meat is not always seen as healthier than conventional meat. More consumers believe plant-based beef is healthy than believe conventional beef is healthy, but fewer than believe conventional chicken is healthy.

Health rating of plant-based and conventional meat, among plant-based meat buyers



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025

How healthy do you think [product] is? Plant-based beef like Beyond Meat or Impossible Burger / Plant-based chicken like Impossible nuggets or Gardein chick'n / Conventional ground beef / Conventional chicken breast

How do plant-based meat consumers rate plant-based meat in terms of healthiness compared to conventional meat?

Most plant-based meat buyers rate plant-based products similar or better than they rate equivalent conventional products on healthfulness. However, there is variation by meat type.

Many rate plant-based beef higher on being healthy than they rate conventional beef. On the other hand, most rate plant-based chicken similar or lower on being healthy than they rate conventional chicken. This likely reflects strong conventional chicken health perceptions as well as the fact that many top selling plant-based chicken products are breaded (e.g., nuggets).

Health rating of plant-based versus conventional equivalent
Comparing individual rating of each product type

	Plant-based vs. conventional meat (Avg)	Plant-based vs. conventional beef	Plant-based vs. conventional chicken
Healthier	34%	52%	15%
Equal	44%	38%	51%
Less Healthy	22%	10%	33%

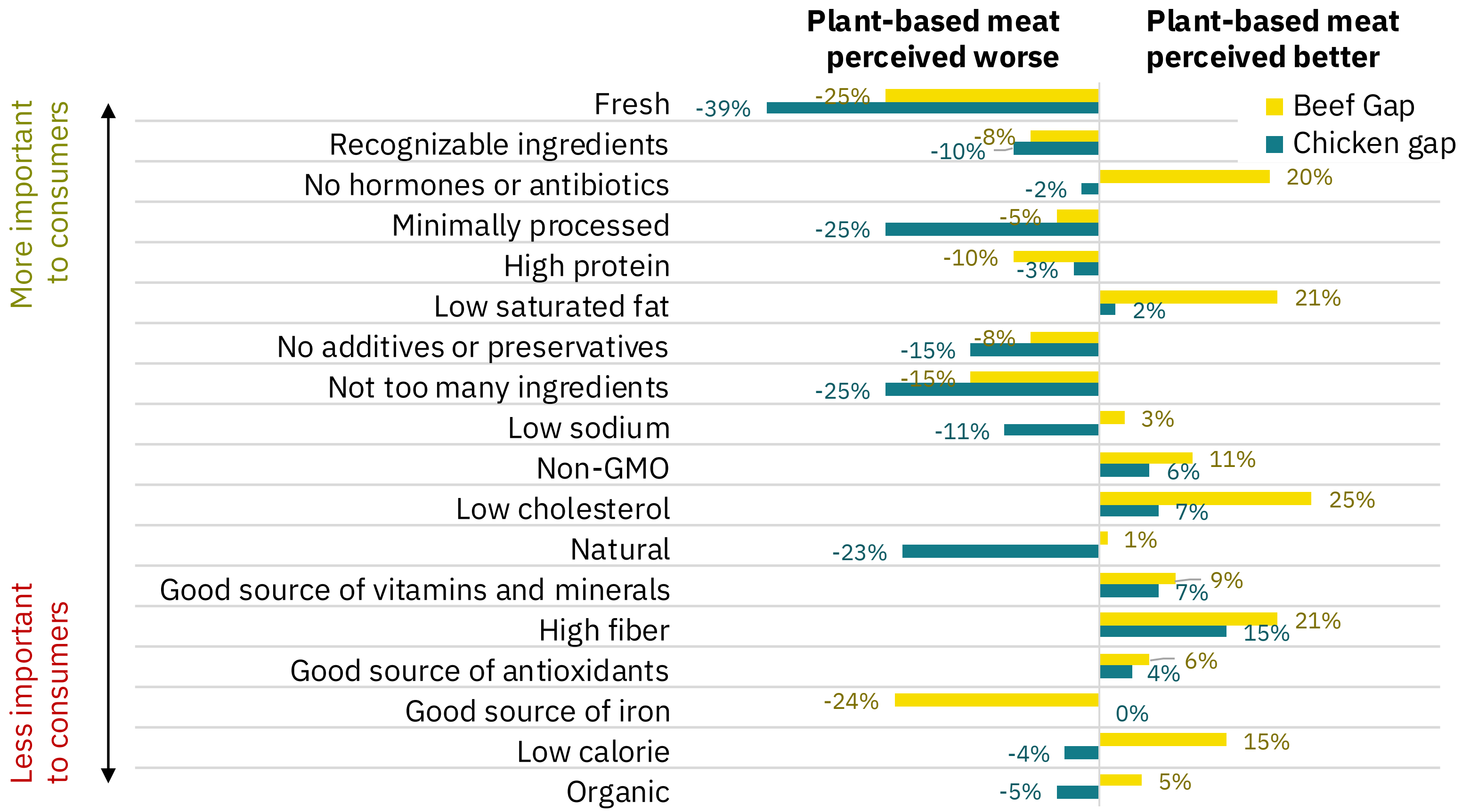
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
How healthy do you think [product] is? Plant-based beef like Beyond Meat or Impossible Burger / Plant-based chicken like Impossible nuggets or Gardein chick'n / Conventional ground beef / Conventional chicken breast

What’s behind the relative health ratings of plant-based and conventional beef and chicken?

Consistent with overall health ratings, plant-based chicken has larger gaps to its conventional counterpart on health attribute ratings than plant-based beef. In particular, there are gaps on being fresh, minimally processed, not having too many ingredients, and being natural. It does get credit for having fiber.

Plant-based beef’s biggest gap to its conventional counterpart is on being a good source of iron (although relatively few indicated this was important). On the other hand, plant-based beef has stronger ratings than conventional beef on being low in saturated fat and cholesterol, having no hormones/antibiotics, and being high-fiber.

Plant-based meat vs. conventional meat gap on delivers “very well”



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025

Thinking about the [Plant-based beef like Beyond Meat or Impossible Burger/ Plant-based chicken like Impossible nuggets or Gardein chick’n] you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? *(Select all that apply)*

How do consumers feel about the healthfulness of conventional meat and its role in their diet?

Perceptions of conventional meat health are complex.

In qualitative research, consumers categorized conventional poultry (particularly "white meat") and seafood as very healthy. Both were described as lean/low fat and high protein.

Beef was more polarizing. It had top-of-mind associations with protein and iron but was perceived to be high in fat and cholesterol. Some kinds of beef, like grass-fed and low-fat cuts, were seen as healthier. While many highlighted these, they often admitted they were not choosing them routinely.

Many feel eating animal meat may be "necessary," even plant-based meat consumers.

In qualitative research, many shared opinions that animal meat was the best source of protein, and they felt it had important nutrients they weren't sure were available in other foods, such as iron, B12, and amino acids.

Even current plant-based meat consumers often expressed that eating animal meat is "natural," "normal," and something people have been "eating for such a long time."

64%

Of verified plant-based meat buyers strongly agree/agree that it's **natural** for people to eat animals

GFI

49%

Of U.S. adults aged 18–59 strongly/somewhat agree that people **need to eat animal meat** to have a healthy diet

GFI

Focus groups and digital ethnographies with n=42 frequent/occasional/lapsed plant-based meat consumers in Chicago and Los Angeles, 2024
Survey of n=4,009 U.S. adults ages 18+ March 2025; among n=2,220 plant-based meat buyers (verified past year purchasers and claimed eaters of plant-based meat) and n=621 non-buyers (non-retail purchasers and claimed non-eaters
Good Food Institute, Survey of n=3000 U.S. consumers aged 18-59, May 2024.

Health as a purchase driver

Key findings

How does health impact plant-based meat buying?

Alexey Rotanov/stock.adobe.com

Concern with health drives higher spend on plant-based meat.

Consumers who care about health in their food choices spend more than average on plant-based meat (and those who think plant-based meat is very healthy spend more than those who don't).

Further, consumers who prioritize avoiding antibiotics/hormones (which is a top specific health concern) spend more than average on plant-based meat.

While concern about sustainability is a stronger predictor of plant-based meat spend, only a small segment of consumers make food choices based on this.

Health impacts differ depending on the equivalent meat type.

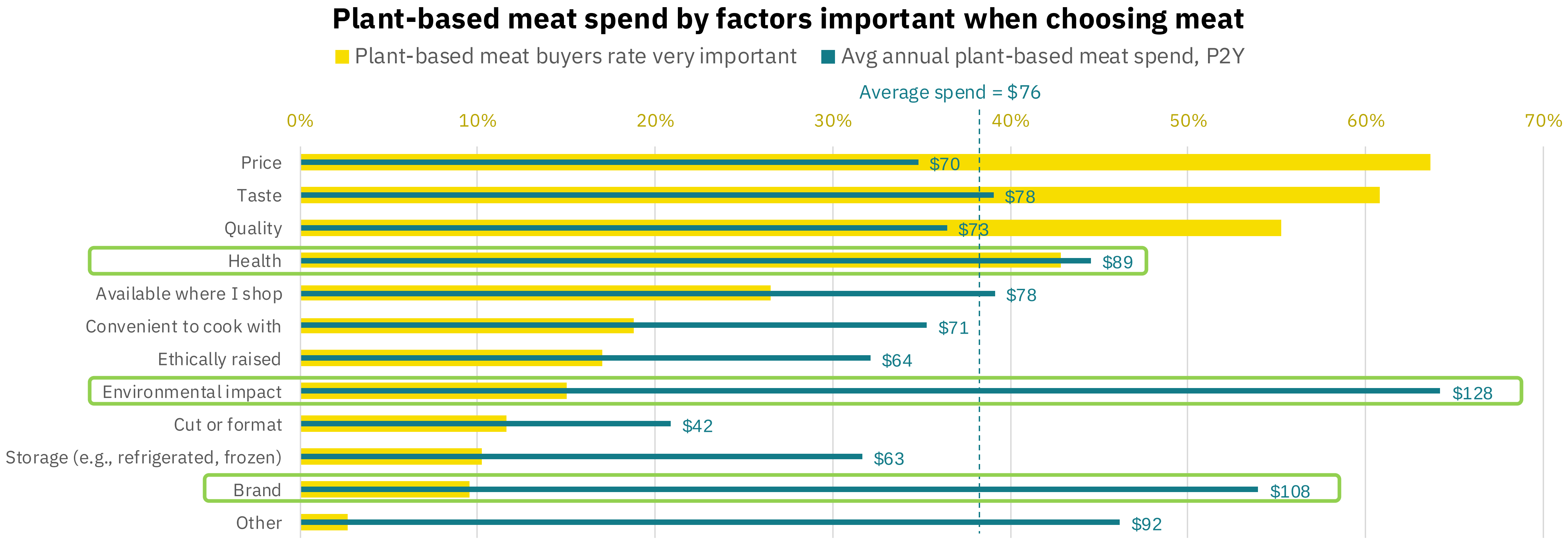
The effect of health priority on spend is more pronounced for plant-based chicken, where people who believe it is "very" healthy spend much more than those who believe it is only "somewhat" healthy (versus beef, where those who believe it is "very" or "somewhat" spend comparably).

The bar for health may be higher for some plant-based meat types.

For both plant-based meat beef and chicken, consumers who believe it is high-protein and has no antibiotics/ hormones spend more than average.

Which meat purchase drivers correlate with plant-based meat purchasing?

Consumers who say health is a top attribute they consider when buying meat spend more than average on plant-based meat. People who prioritize attributes like environmental impact and brand spend more, but few prioritize these attributes.



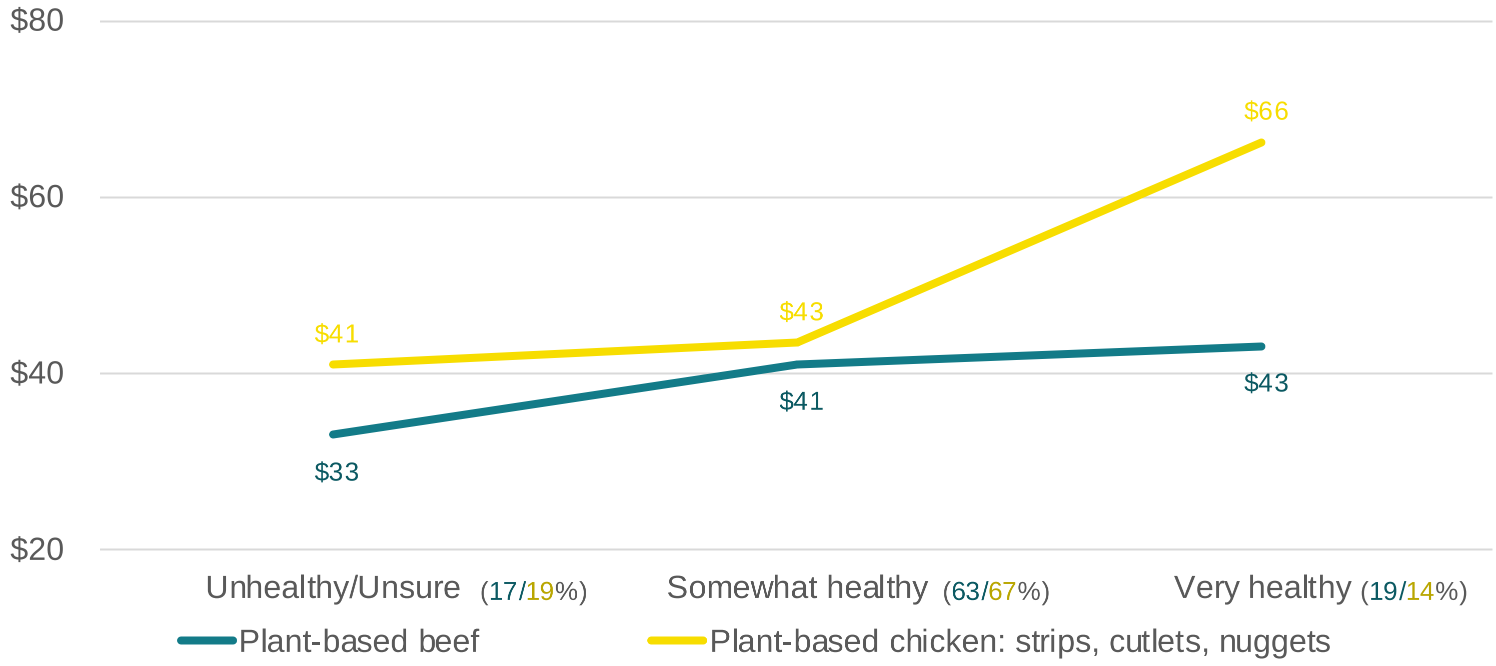
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
Think about when you are shopping for meat, conventional and/or plant-based, which of the following are most important in your decision of which meat products to buy? Select at least 2 and at most 4
Circana, Complete Consumer® Scan Panel, 260 weeks ending April 2025. Categories: frozen, refrigerated, and single serving meat alternatives, inc. plant-based grounds, burgers, meatballs, strips/nuggets/cutlets, deli slices, sausages, 'other.' Avg. annual $ spent per-category, across past 2 years.

How do health perceptions predict spend on different types of plant-based meat?

Health perceptions correlate with purchase behavior (both dollar spend, shown here, and volume), but the relationship is different for plant-based beef and chicken. For plant-based beef, consumers rating it somewhat or very healthy buy similar amounts but more than those who feel it is unhealthy. For plant-based chicken, consumers need to feel it is very healthy before they buy significantly more.

This may reflect perceptions relative to conventional counterparts. For example, conventional chicken is often seen as healthier, so plant-based chicken may need to reach a higher perceived threshold of health to capture a higher share of spend.

Spend on plant-based beef and chicken by how healthy believe they are



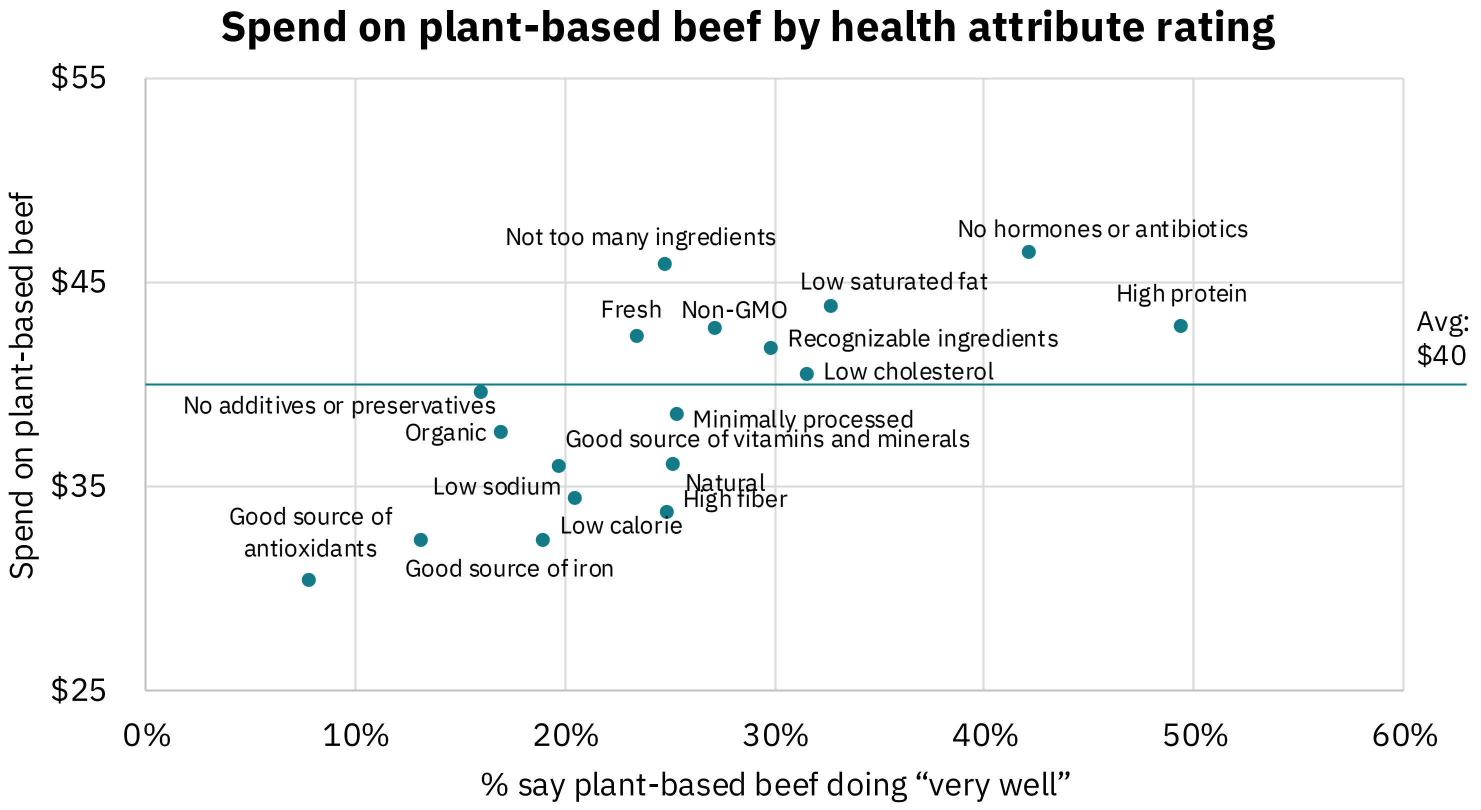
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
X: How healthy do you think [product] is? Plant-based beef like Beyond Meat or Impossible Burger / Plant-based chicken like Impossible nuggets or Gardein chick'n . Rates of agreement for health are aggregated based on which product consumers rated (plant-based beef or chicken). Ratings for each type vary by <=3% agreement around the aggregate.
Y: Circana, Complete Consumer® Scan Panel, 260 weeks ending April 2025. Categories: Beef = Plant-based grounds, burgers, meatballs; Chicken = plant-based strips, nuggets, cutlets. Avg. annual $ spent per-category, across past 2 years.

How do the benefits consumers associate with plant-based beef predict spend?

Consumers who see plant-based beef as **high-protein, free of hormones and antibiotics, low in fat and cholesterol**, or **not containing too many or certain types of ingredients** spend more than average.

Many consumers perceive plant-based beef to deliver well on being high-protein and free of hormones and antibiotics (and these are top purchase drivers for meat overall), suggesting these are important strengths to reinforce.

While few/recognizable ingredients can be a purchase driver, there are larger gaps to close. Being seen as fresh can also drive spend, but meaningfully improving on this attribute may be a challenge for products often sold frozen.



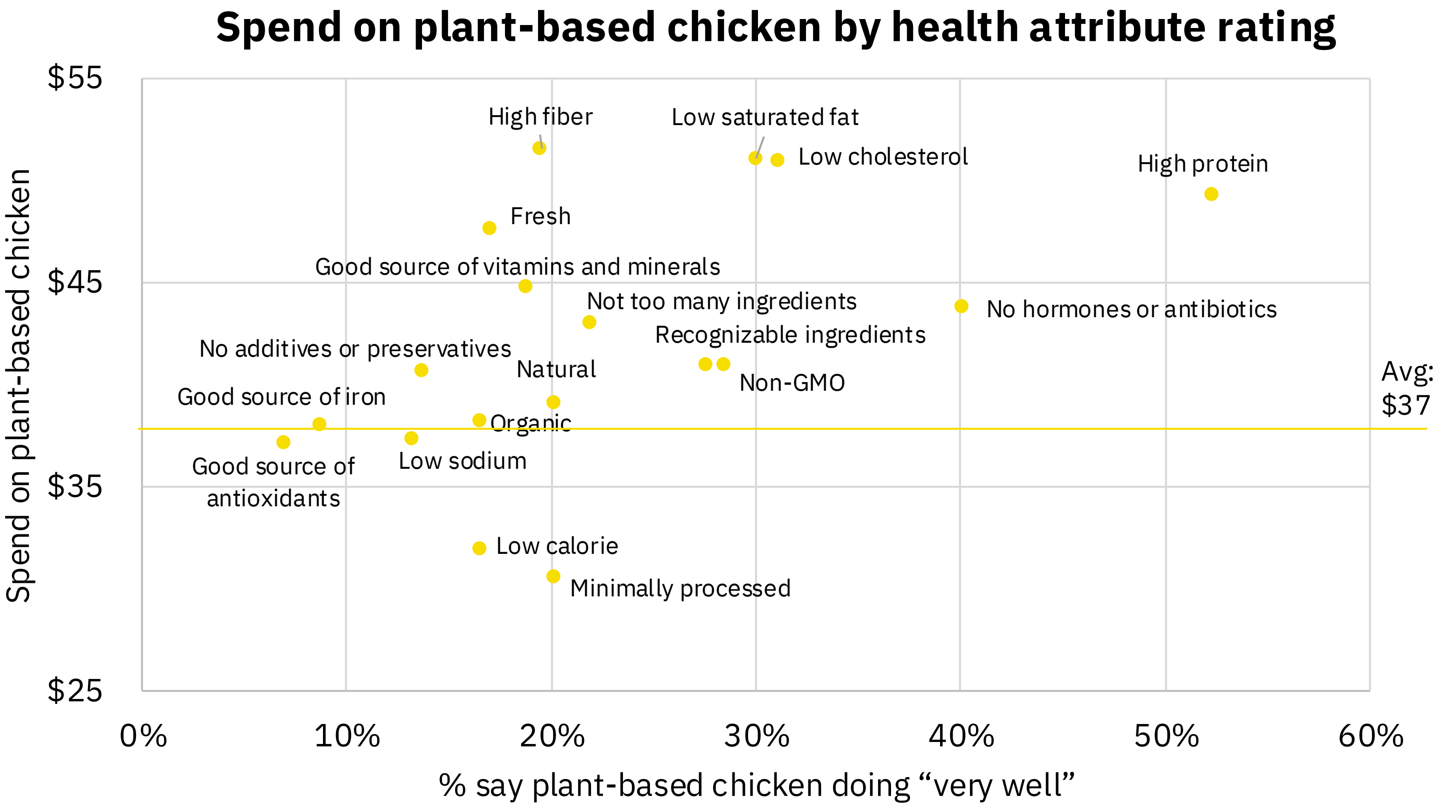
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
X: Thinking about the plant-based beef like Beyond Meat or Impossible Burger you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? (*Select all that apply*)
Y: Circana, Complete Consumer® Scan Panel, 260 weeks ending April 2025. Categories: Plant-based grounds, burgers, meatballs. Avg. annual $ spent per-category, across past 2 years.

How do the benefits consumers associate with plant-based chicken predict spend?

Like plant-based beef, consumers who see plant-based chicken as **high-protein and low in fat and cholesterol** spend more. For plant-based chicken, being seen as **high in fiber** is uniquely associated with higher spend.

While many see plant-based chicken as **free of hormones and antibiotics**, they spend only slightly more than average, suggesting this may not be as salient a competitive advantage for plant-based chicken as for beef.

While few and recognizable ingredients can be purchase drivers for plant-based chicken, they are not as predictive of spend as other attributes.



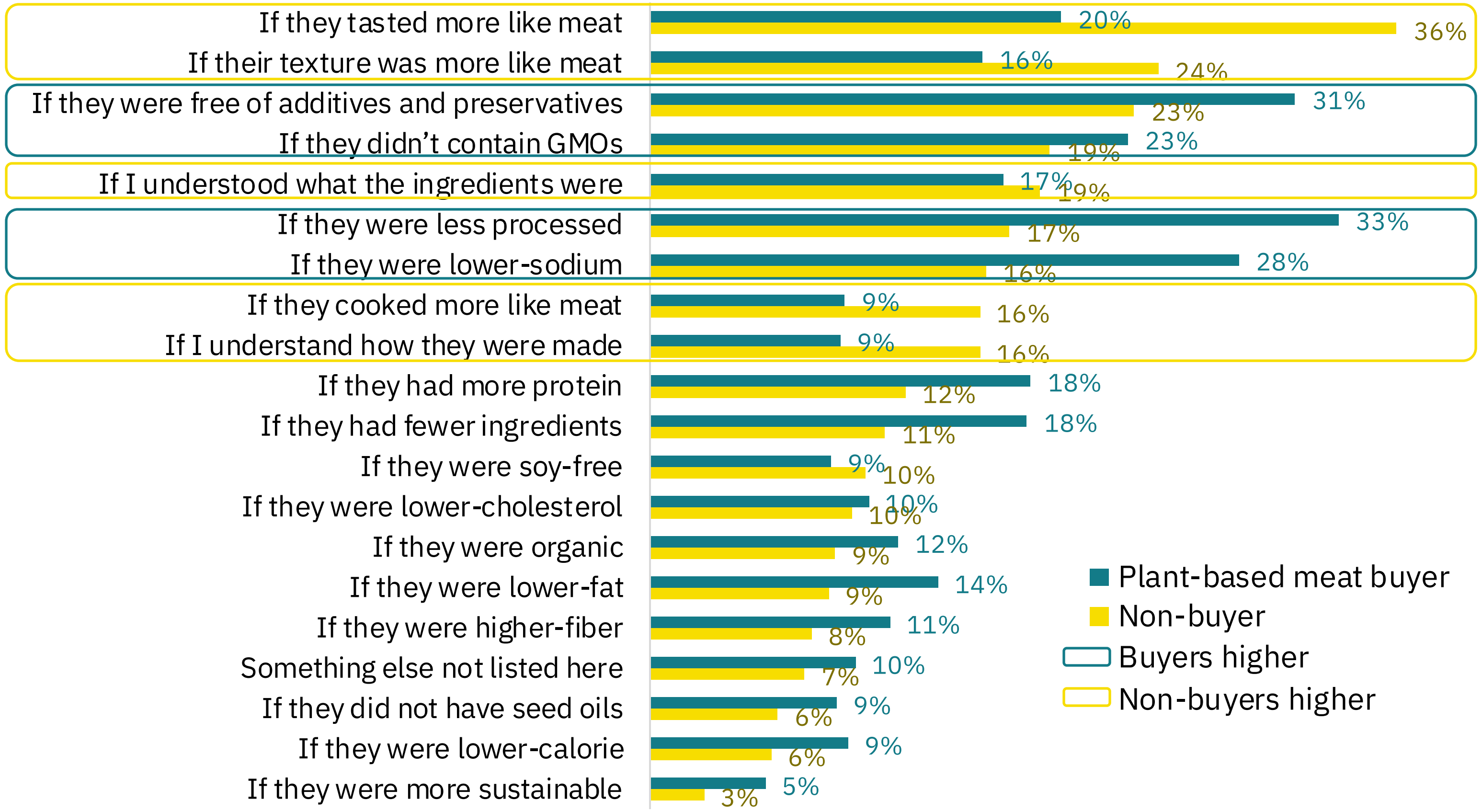
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
X: Thinking about the plant-based chicken like Impossible nuggets or Gardein chick'n you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? (*Select all that apply*)
Y: Circana, Complete Consumer® Scan Panel, 260 weeks ending April 2025. Categories: Plant-based strips, cutlets, & nuggets. Avg. annual $ spent per-category, across past 2 years.

What would make consumers buy more or start buying plant-based meat?

When asked to self-report what would make them likely to buy more plant-based meat, **current buyers** are most likely to cite health-related factors, including being **free of additives, preservatives, and GMOs, being less processed, and having less sodium**.

Non-buyers would be more motivated by improvements in fundamental attributes like **taste and texture**. They may also respond to similar health improvements as current buyers and are more likely to say it would help if they better understood **how the products are made**.

What would lead consumers to buy (more) plant-based meat?



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
For current buyers/eaters: What, if any, of these reasons would make you consider buying more plant-based meat products? *(Select at least 1 and up to 5); excludes 11% who said "nothing"*
For non-buyers/eaters: What, if any, of these reasons would make you more likely to consider buying plant-based meat products? *(Select at least 1 and up to 5); excludes 19% who said "nothing"*

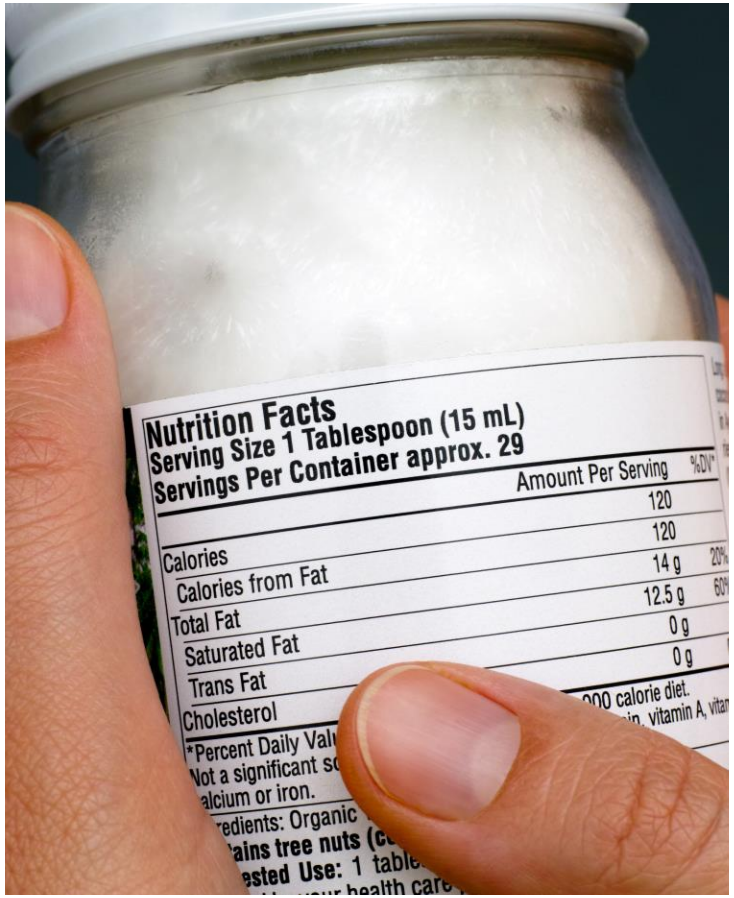
Meeting consumer heath demand

Nutrition
Ingredients
Processing

Nutrition

Key findings

How do consumers respond to nutrient content?



rosinka79/stock.adobe.com

Consumer approaches to evaluating key nutrients vary.

To assess the quantity of key nutrients, using percent daily values is most common, but many also rely on milli/grams or more subjective assessments. A minority report relying on on-pack claims, but actual shopping behavior reveals consumers often attend to this information.

Protein should be reinforced.

Plant-based meat does not lag on protein content today—most products meet or exceed consumer expectations and consumers rate it relatively highly on delivering protein. However, consumers tend to perceive that plant-based meat has less protein than conventional meat, suggesting there is opportunity to reinforce protein comparability via messaging or claims.

Low-fat can be a differentiator.

Many consumers want low-fat (and cholesterol), and those who believe plant-based meat delivers spend more. Most products exceed consumer needs, but there is room to increase awareness.

Fiber may be underleveraged.

Consumer expectations for fiber in the context of meat are unclear. Most plant-based meat products are on the low end of expectations. Consumer education may be needed, and there may be opportunity to enhance products.

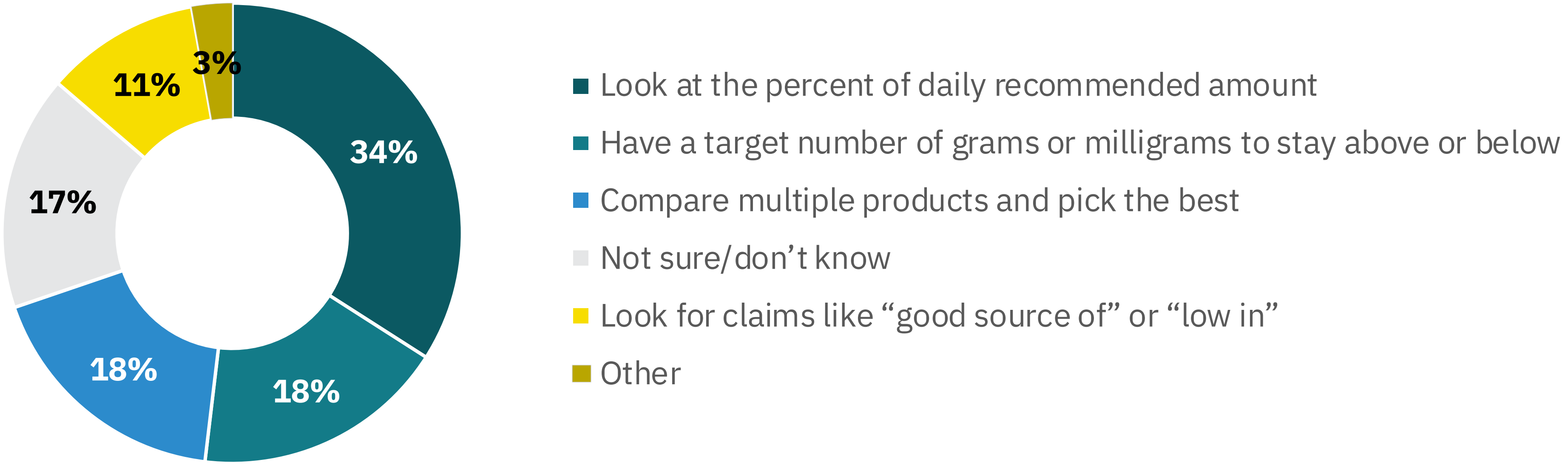
Sodium is a barrier for some.

Many consumers care about sodium, and some say it is a barrier to considering plant-based meat. Most products do not meet consumer expectations (although evaluation is inconsistent), suggesting product opportunity.

How do consumers evaluate key nutrients in plant-based meat?

When consumers are asked specifically about how they evaluate key nutrients like fat, fiber, protein, and sodium, their approaches are diverse. They are two times more likely to look at percent daily values than at milli/grams. Many simply compare products, look for claims, or have other approaches.

How do consumers evaluate nutrients (fat, fiber, protein, sodium) in plant-based meat?

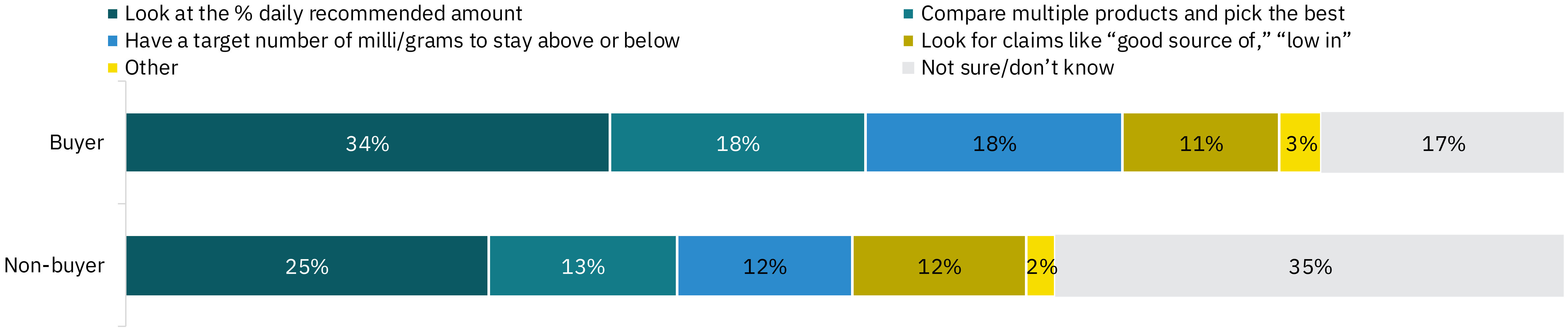


Survey of n=4,009 U.S. adults ages 18+ March 2025; among n=2,220 meat alternative consumers (both verified past year purchasers and claimed eaters of meat alternatives)
How do you (or would you expect to) most often evaluate the amount of (protein/saturated fat/sodium/fiber) in a plant-based meat product? With each answering twice (for 2 randomized nutrients)

How do plant-based meat buyers compare to non-buyers on approaches to evaluating nutrients?

Most current plant-based meat buyers have a top-of-mind approach for evaluating content of key nutrients. In contrast, non-buyers are more likely to say they are not sure or don't have a top-of-mind approach for how they would evaluate amounts of specific nutrients, suggesting opportunity for education.

How do/would buyers and non-buyers evaluate nutrients in plant-based meat?

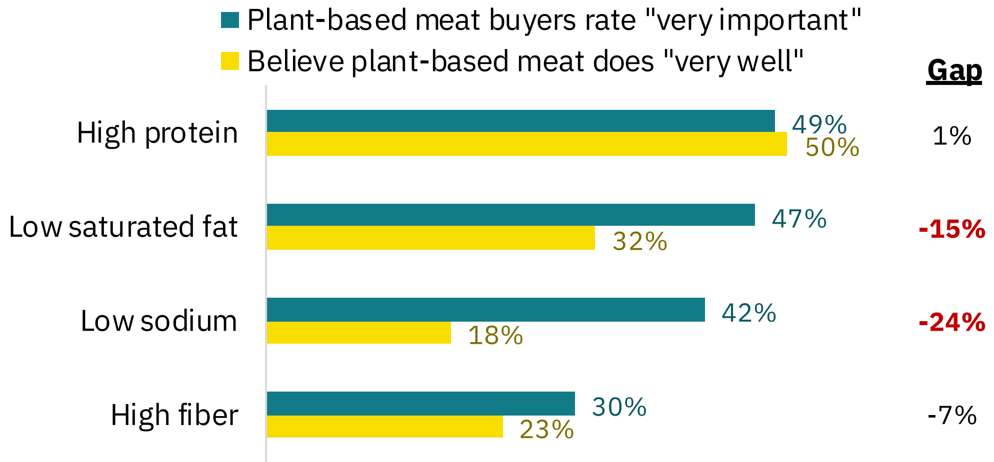


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
How do you (or would you expect to) most often evaluate the amount of (protein/saturated fat/sodium/fiber) in a plant-based meat product? With each answering twice (for 2 randomized nutrients); results for individual nutrients on next page

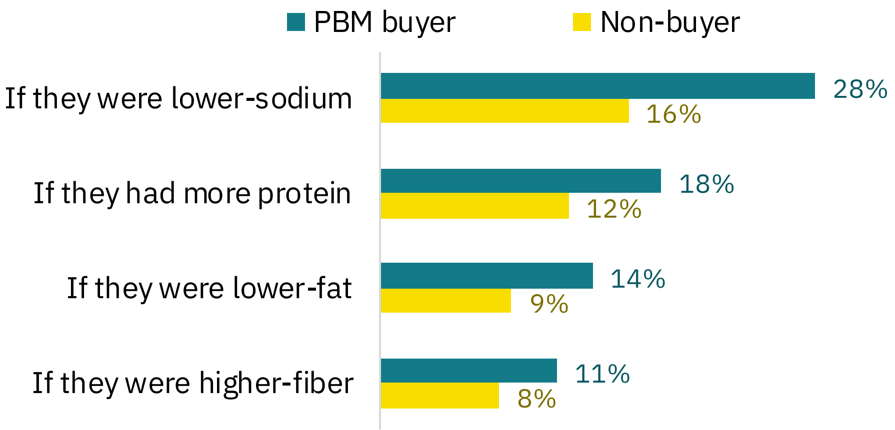
How do consumers perceive plant-based meat to deliver on key nutrients?

Plant-based meat's biggest perceived gaps to consumer needs around nutrients are being low-sodium and low-saturated fat. Improvements on these nutrients, especially sodium, would motivate some to buy plant-based meat more often. While protein has a smaller gap between importance and delivery, plant-based meat is still perceived to lag on this attribute relative to conventional meat and may not be getting credit for what it offers. Fiber may represent a latent opportunity—while it has lower importance in the context of choosing meat, gut health is a high priority for many, and consumer education around the fiber in plant-based meat may be compelling.

Which nutrients are gaps/strengths for plant-based meat?



What would lead consumers to buy (more) plant-based meat products (top 5)?



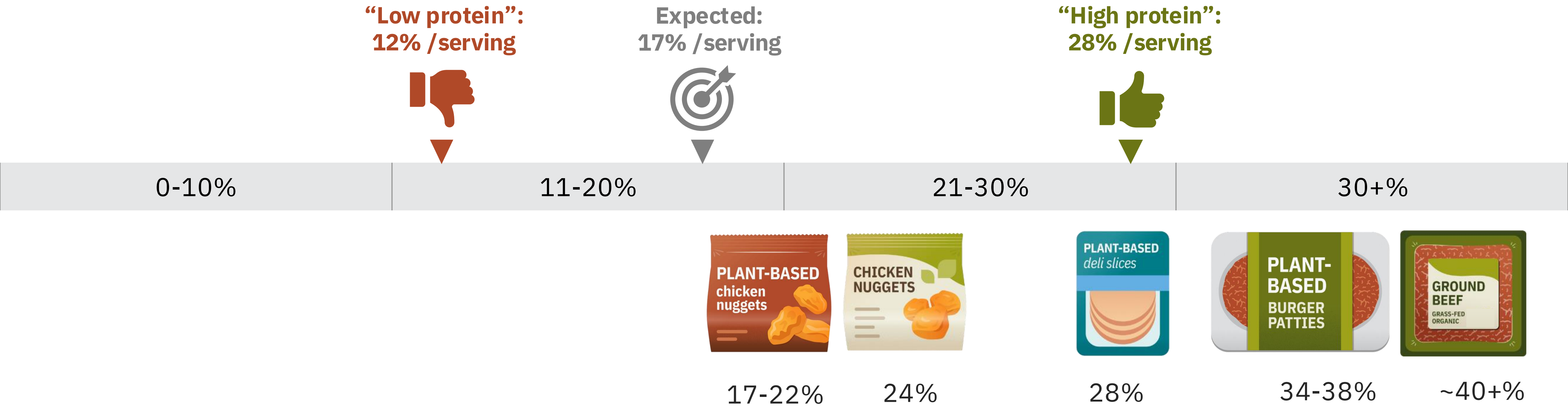
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Left chart: When you are choosing meat products to buy, conventional and/or plant-based, how important are the following to you?; Thinking about the [Plant-based beef like Beyond Meat or Impossible Burger/ Plant-based chicken like Impossible nuggets or Gardein chick'n] you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? (*Select all that apply*) weighted average of n=1,037 who answered about plant-based beef and n=704 who answered about plant-based chicken; Subset of responses shown. Right chart: For current buyers/eaters: What, if any, of these reasons would make you consider buying more plant-based meat products? (*Select at least 1 and up to 5);* For non-buyers/eaters: What, if any, of these reasons would make you more likely to consider buying plant-based meat products? (*Select at least 1 and up to 5);* Subset of responses shown.

How do plant-based meat products compare to consumers’ expectations and conventional meat in terms of protein quantity in terms of % daily value?

Many plant-based meat products exceed consumers’ protein expectations, and many plant-based beef products would be considered “high-protein.”

PBM consumer expectations (top) vs. example products on market (bottom)

% daily value / serving for PB meat



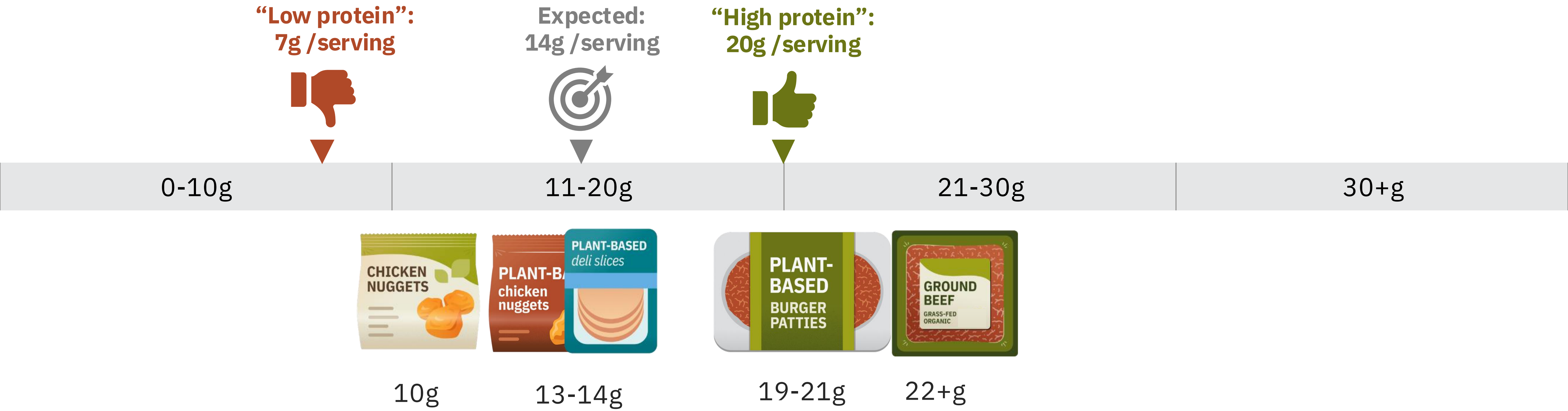
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of %DVs shown when asked whether they’d consider a plant-based meat product with this nutrient in that range to be: “low,” “high,” and how much they’d expect it to have
Averages exclude outliers who reported 100% for any condition (0.6% of respondents)
Protein contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

How do plant-based meat products compare to consumers’ expectations and conventional meat in terms of protein quantity in terms of grams?

Consumers’ protein expectations for plant-based meat are less generous when framed as grams versus percent daily values (though more consumers claim to rely on percent daily values than grams).

PBM consumer expectations (top) vs. example products on market (bottom)

Grams / serving for PB meat



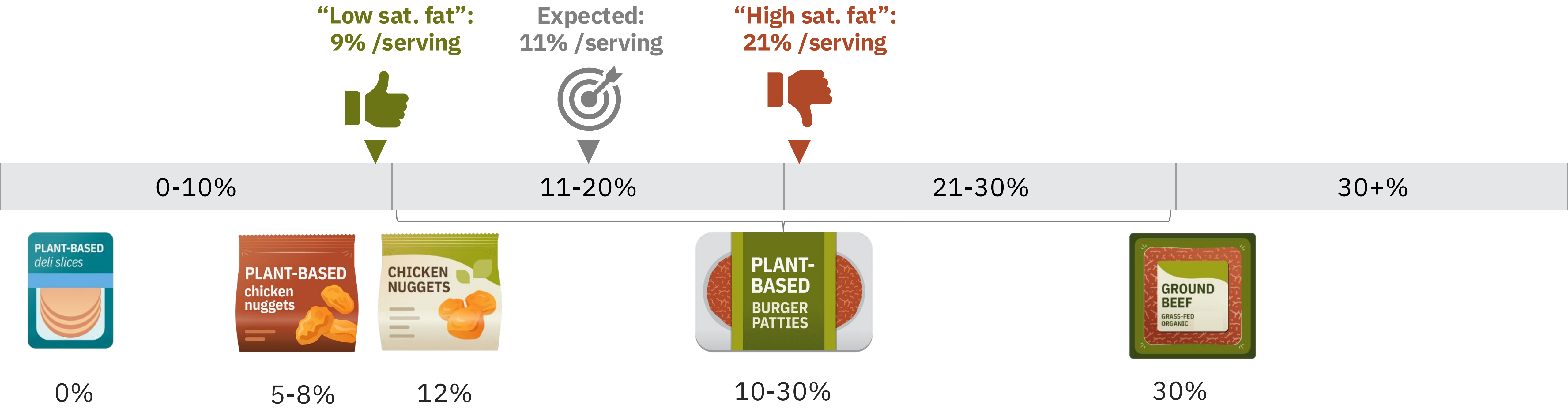
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of grams shown when asked whether they’d consider a plant-based meat product with this nutrient in that range to be: “low,” “high,” and how much they’d expect it to have
Averages exclude outliers who reported 100+g for any condition (2.4% of respondents)
Protein contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

How do plant-based meat products compare to consumers’ expectations and conventional meat in terms of saturated fat content in terms of % daily value?

Many commonly available plant-based meat products meat consumer expectations for having “low” saturated fat. However, some plant-based beef products do not.

PBM consumer expectations (top) vs. example products on market (bottom)

% daily value / serving for PB meat



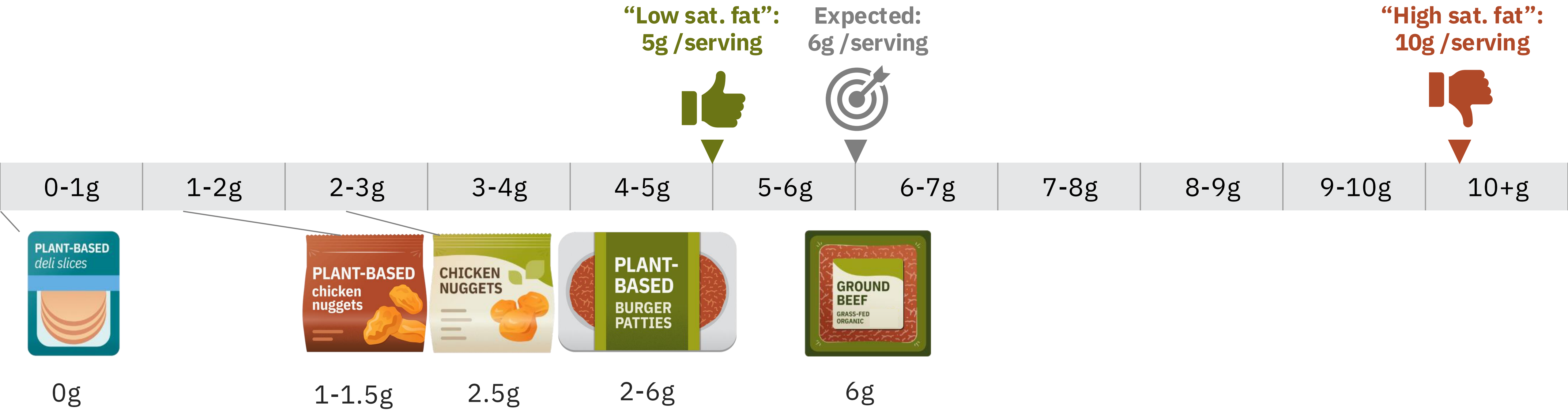
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of %DVs shown when asked whether they’d consider a plant-based meat product with this nutrient in that range to be: “low,” “high,” and how much they’d expect it to have
Averages exclude outliers who reported >75% for any condition (1.6% of respondents)
Saturated fat contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

How do plant-based meat products compare to consumers' expectations and conventional meat in terms of saturated fat content in terms of grams?

Consumers who rely on grams to assess saturated fat tend to set higher thresholds. All plant-based meat products would be well below the average expectation for "low" saturated fat when stated as grams.

PBM consumer expectations (top) vs. example products on market (bottom)

Grams / serving for PB meat



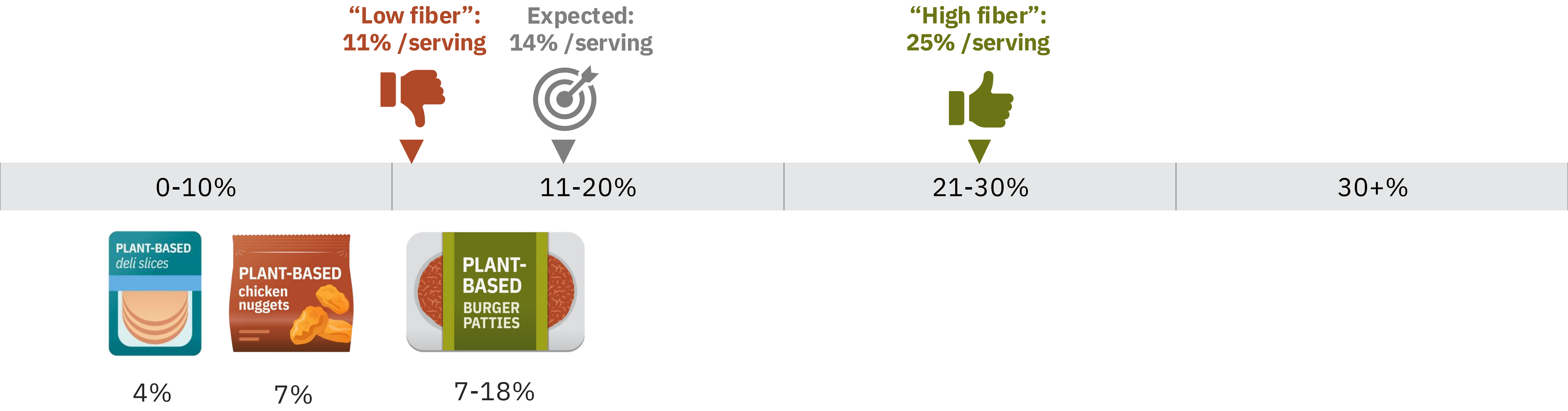
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of grams shown when asked whether they'd consider a plant-based meat product with this nutrient in that range to be: "low," "high," and how much they'd expect it to have
Averages exclude outliers who reported 100+g for any condition (1.8% of respondents)
Protein contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

How do plant-based meat products compare to consumers' expectations and conventional meat in terms of fiber content in terms of % daily value?

Few plant-based meat products (and even few whole fruits and vegetables) would meet consumer expectations for fiber based on looking at percent daily values, suggesting consumer expectations may not be well-informed or realistic. Conventional meat typically contains no fiber.

PBM consumer expectations (top) vs. example products on market (bottom)

% daily value / serving for PB meat



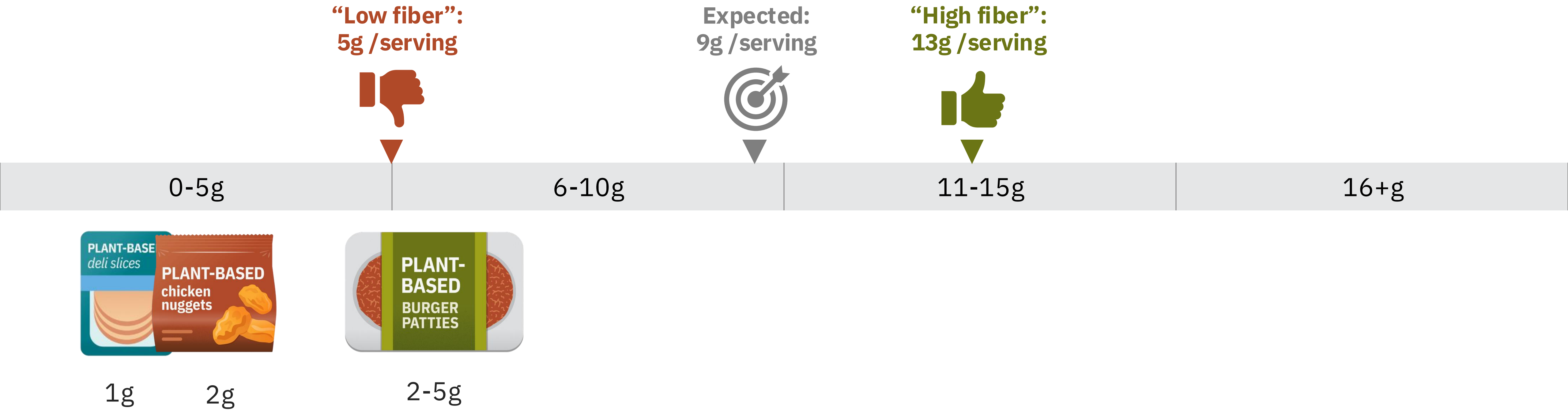
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of %DVs shown when asked whether they'd consider a plant-based meat product with this nutrient in that range to be: "low," "high," and how much they'd expect it to have
Averages exclude outliers who reported 100% for any condition (0.5% of respondents)
Fiber contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

How do plant-based meat products compare to consumers' expectations and conventional meat in terms of fiber content in terms of grams?

Most plant-based meat products also fall short of consumers' expectations of dietary fiber in terms of grams.

PBM consumer expectations (top) vs. example products on market (bottom)

Grams / serving for PB meat



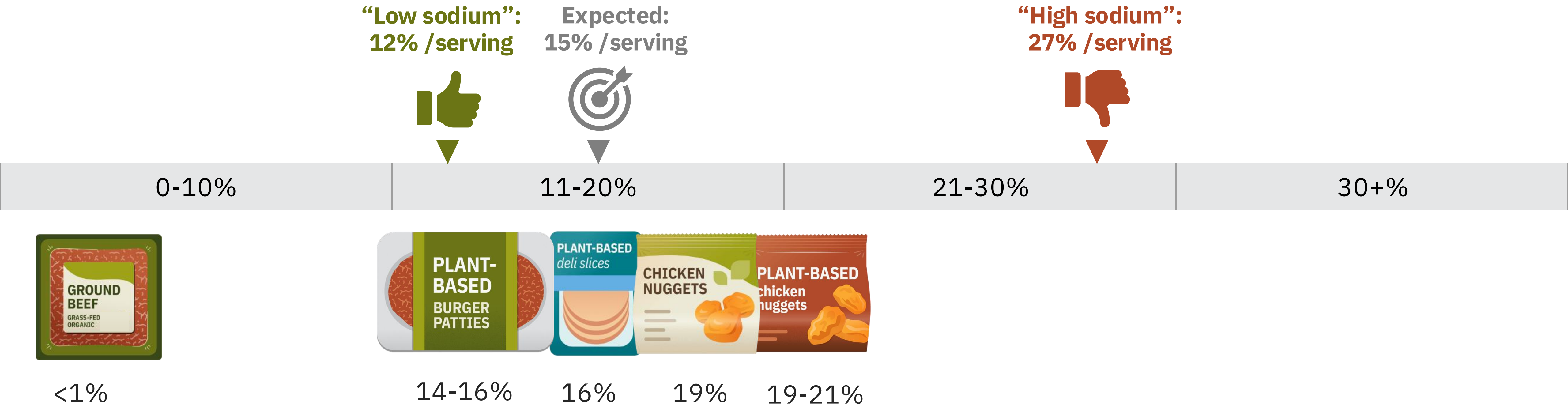
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of grams shown when asked whether they'd consider a plant-based meat product with this nutrient in that range to be: "low," "high," and how much they'd expect it to have
Averages exclude outliers who reported 100+g for any condition (1.8% of respondents)
Protein contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

How do plant-based meat products compare to consumers' expectations and conventional meat in terms of sodium content in terms of % daily value?

Many consumers would see the levels of sodium in common plant-based meat products as "low" or at least close to expected values when articulated as percent daily values.

PBM consumer expectations (top) vs. example products on market (bottom)

% daily value / serving for PB meat



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of %DVs shown when asked whether they'd consider a plant-based meat product with this nutrient in that range to be: "low," "high," and how much they'd expect it to have
Averages exclude outliers who reported 100% for any condition (1.9% of respondents)
Sodium contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

How do plant-based meat products compare to consumers' expectations and conventional meat in terms of sodium content in terms of milligrams?

Many plant-based meat products exceed consumers' expectations of "high sodium" in terms of milligrams, though so do some conventional meat products. Consumers who say low sodium is "very important" (versus "somewhat") expect plant-based meat to have even lower sodium (average 160mg per serving).

PBM consumer expectations (top) vs. example products on market (bottom)

Milligrams / serving for PB meat

"Low sodium": 130mg / serving

Expected: 250mg / serving

"High sodium": 360mg / serving

0-100mg	101-200mg	201-300mg	301-400mg	400+mg

0mg

310-370mg

360mg

440mg

430-480mg

Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
% of consumers who gave an answer within the ranges of grams shown when asked whether they'd consider a plant-based meat product with this nutrient in that range to be: "low," "high," and how much they'd expect it to have
Averages exclude outliers who reported >1,200mg for any condition (1.8% of respondents). Rounded to nearest 5mg.
Protein contents of illustrative products chosen from brands among top 100 selling plant-based meat SKUs according to SPINS MULO data, 2024

Ingredients

Key findings

How do consumers respond to ingredients?

Shorter ingredient lists impact consumer choice.

Consumers say they prefer shorter ingredients lists, and this is a key barrier to buying more plant-based meat for some. Purchase data supports this—consumers who say their ideal ingredient list length is significantly shorter than the plant-based meat average spend less than others.

Specific ingredient concerns may be more perception than reality.

Consumers perceive plant-based meat to have gaps on having recognizable ingredients and no additives/ preservatives. However, when shown specific top ingredients in commonly available products, most consumers rate them as positive or neutral.

Some ingredients do raise red flags for consumers.

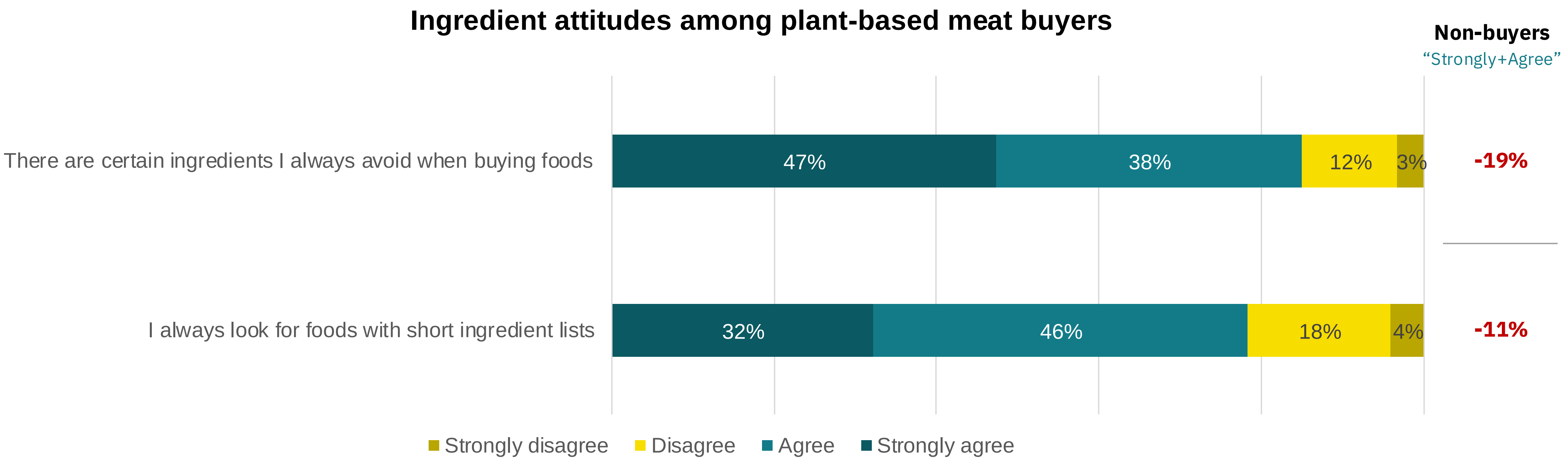
Certain plant-plant-based meat ingredients like methylcellulose and cultured dextrose are strong detractors along with select oils and salt. Salt/sodium, artificial colors, high fructose corn syrup, sugar, and oil/fats are top-of-mind ingredients consumers say they generally avoid.

Not all oils are equal.

Avocado, coconut, and sunflower oil were among the overall positively rated plant-based meat ingredients. While seed oils are a trending topic, very few consumers indicated they avoid them or that they are a barrier for plant-based meat. Some avoid canola oil specifically, but still a minority.

What are consumers' attitudes toward ingredient lists?

Plant-based meat buyers are likely to say they pay attention to ingredients when choosing foods, avoiding certain ingredients and looking for short ingredient lists. Non-buyers are less likely to indicate they do this.

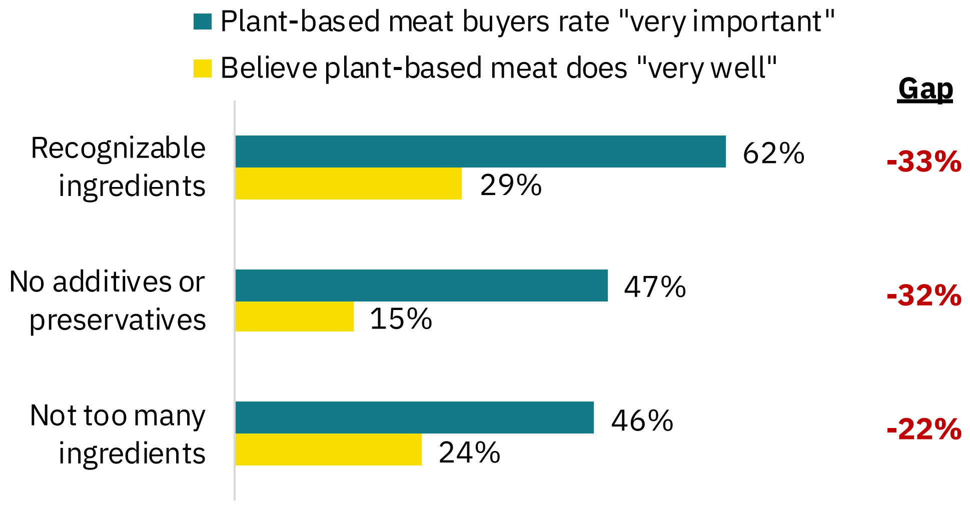


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
For each of the following, how much do you personally agree with these statements? *(Select one for each)*

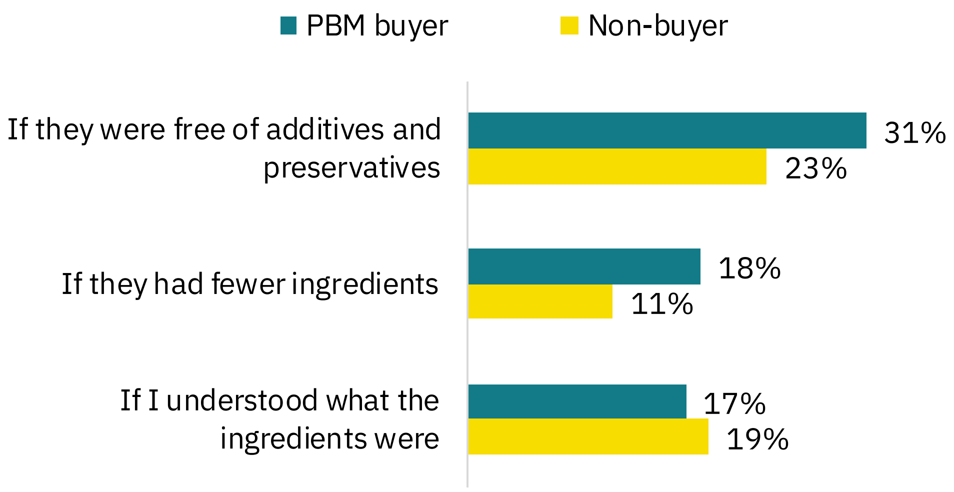
How do consumers perceive plant-based meat to deliver on needs around ingredients?

Ingredients perceptions are a key gap for plant-based meat today, specifically having recognizable ingredients, being free of additives and preservatives, and having “not too many” ingredients. Some buyers and non-buyers indicate these are barriers to them buying (more) plant-based meat.

Which consumer needs are gaps/strengths for plant-based meat?



What would lead consumers to buy (more) plant-based meat products (top 5)?

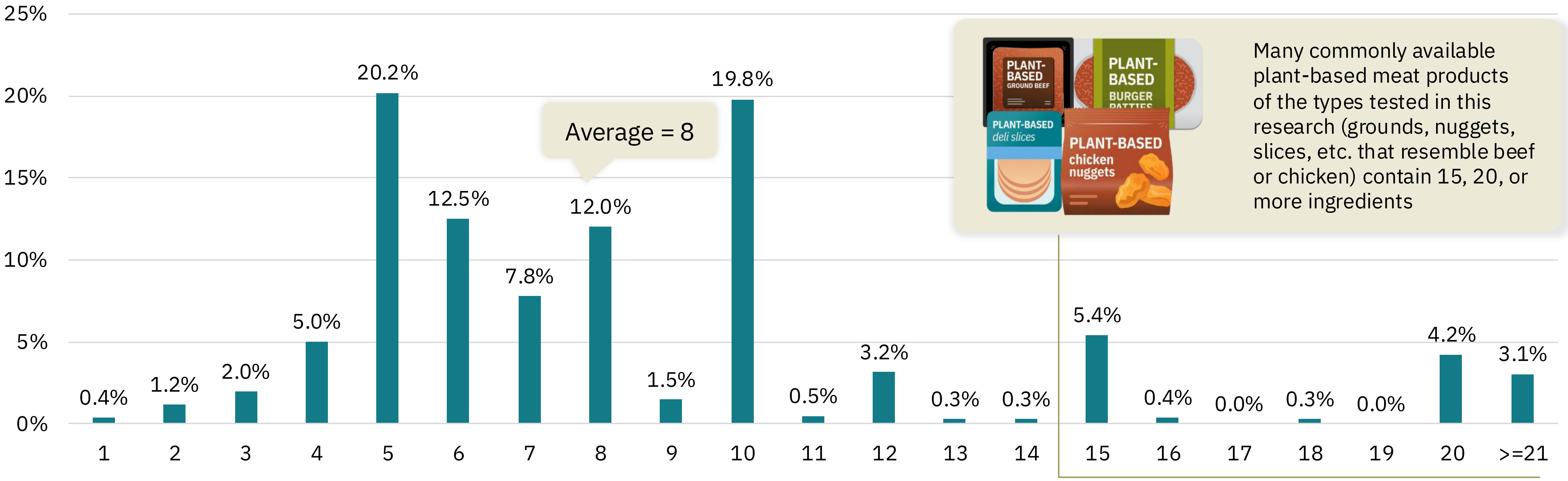


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Left chart: When you are choosing meat products to buy, conventional and/or plant-based, how important are the following to you?; Thinking about the [Plant-based beef like Beyond Meat or Impossible Burger/ Plant-based chicken like Impossible nuggets or Gardein chick’n] you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? (*Select all that apply)* weighted average of n=1,037 who answered about plant-based beef and n=704 who answered about plant-based chicken; Subset of responses shown. Right chart: For current buyers/eaters: What, if any, of these reasons would make you consider buying more plant-based meat products? (*Select at least 1 and up to 5);* For non-buyers/eaters: What, if any, of these reasons would make you more likely to consider buying plant-based meat products? (*Select at least 1 and up to 5);* Subset of responses shown.

What number of ingredients is “too many” for consumers?

Most (8 in 10) consumers set their threshold for number of ingredients at 10 or fewer. By comparison, many commonly available plant-based meat products contain more than 15 ingredients.

How many ingredients on a plant-based meat label would consumers think of as too many?

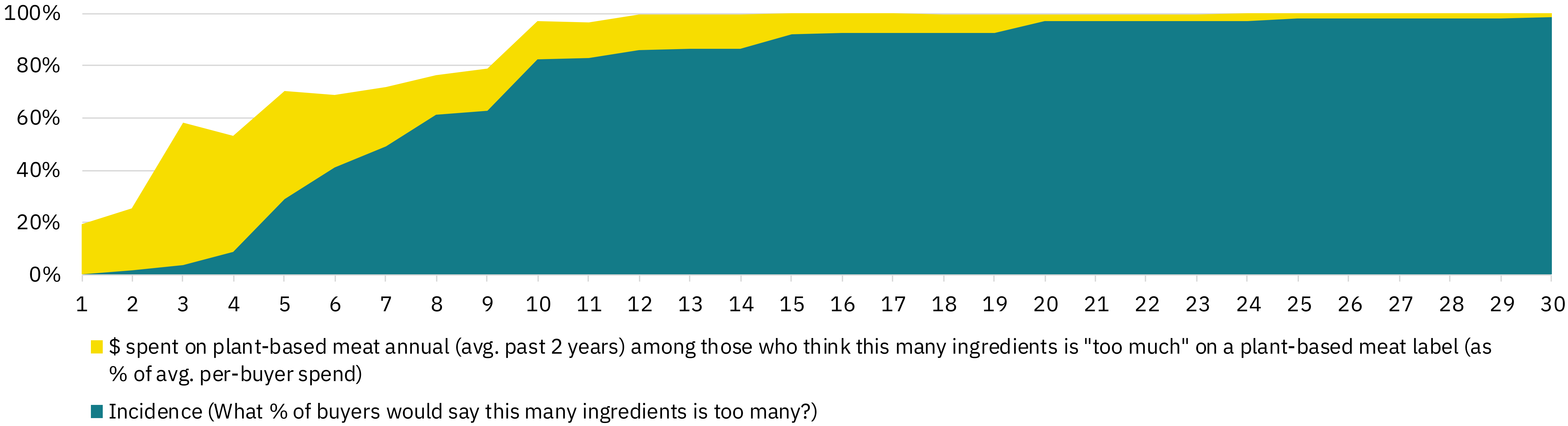


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year, March 2025
Avg. excluding top 1% outliers (30+ ingredients)

Do preferences for ingredient list length translate to spend?

Consumers who look for ingredient lists with 10 or fewer items spend less than average on plant-based meat. Spend generally declines as thresholds for ingredient number decline below 10.

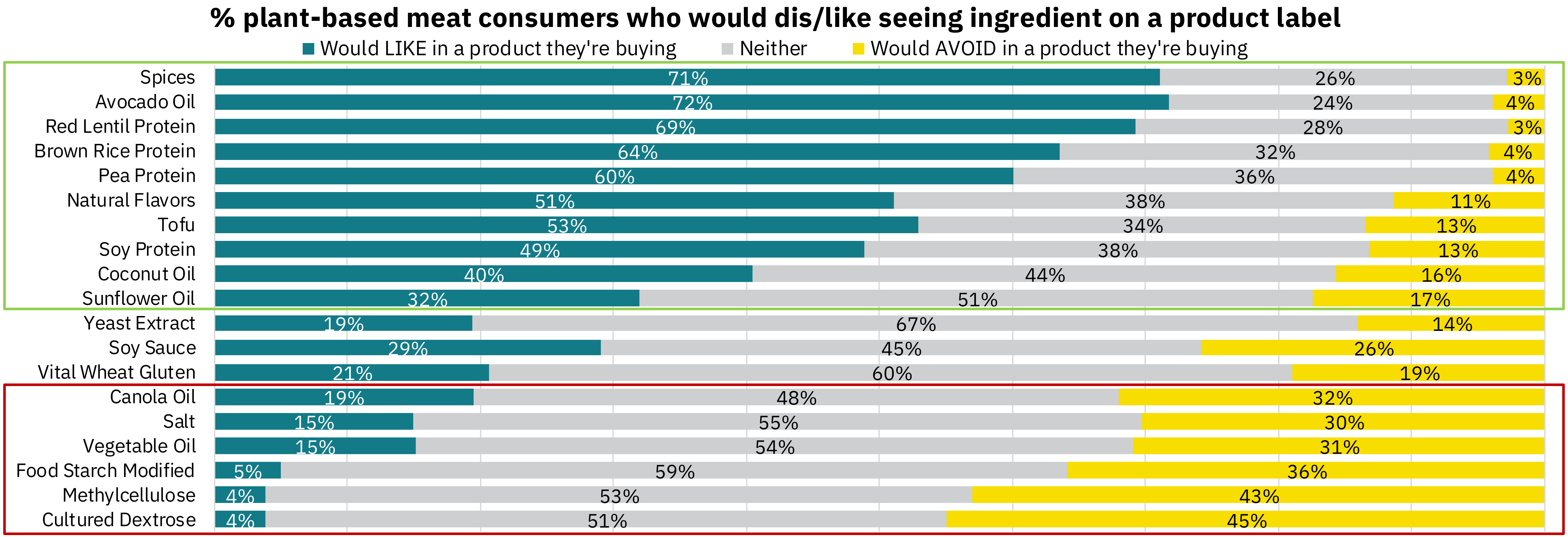
How much do consumers spend on plant-based meat (compared to average) by how many ingredients they think is "too many"



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
Circana, Complete Consumer® Scan Panel, 260 weeks ending April 2025. Categories: Plant-based meat = Frozen Meat Alternatives, Single Serving Meat Alternatives. Avg. annual $ spent per-category, across past 2 years.

What common ingredients do plant-based meat *buyers* seek or avoid?

Plant-based meat consumers have more ingredients they like to see on labels than dislike. These include avocado oil, spices, and several types of plant protein. Other oils, salt, and almost all texturing agents are more likely to be avoided.

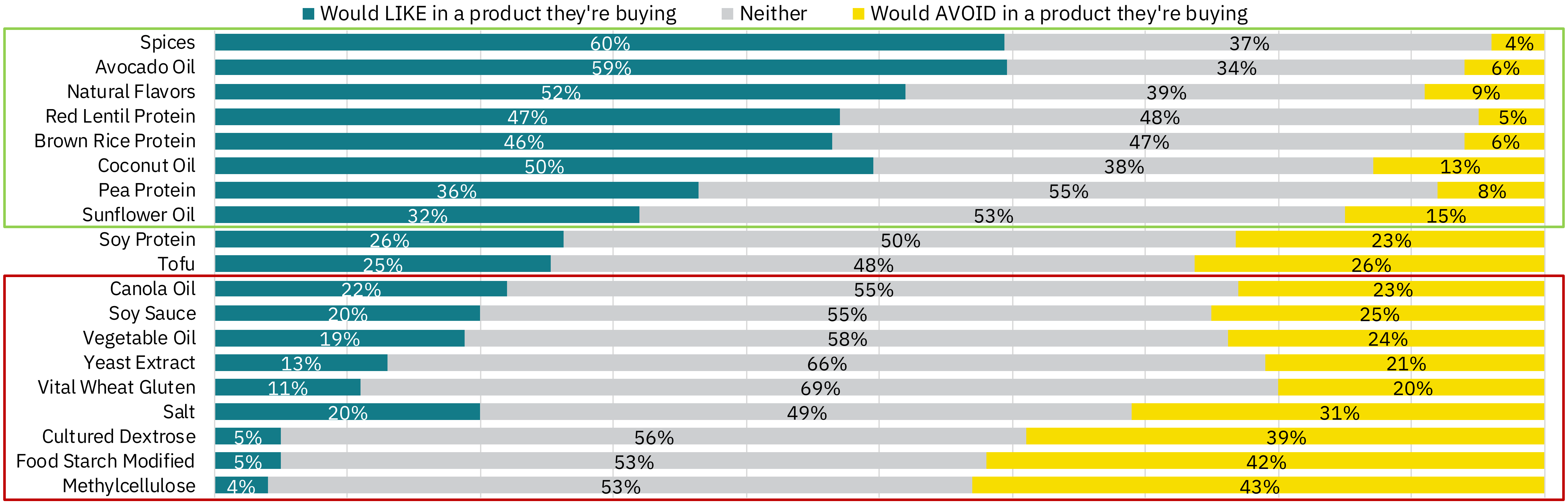


Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025
Sample who saw each nutrient ranges from n=991 to n=4,009 depending on how many illustrative nutrition lists it was present on (each respondent saw 1 of 4 randomized)
How would you feel about each of these ingredients in a plant-based meat product?

What common ingredients do plant-based meat *non-buyers* seek or avoid?

Non-buyers of plant-based meat tend to have similar perceptions as buyers when it comes to the most liked and disliked ingredients, although are less enthusiastic about some common plant-proteins, particularly soy-based ingredients.

% plant-based meat non-consumers who would dis/like seeing ingredient on a product label



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Sample who saw each nutrient ranges from n=991 to n=4,009 depending on how many illustrative nutrition lists it was present on (each respondent saw 1 of 4 randomized)
How would you feel about each of these ingredients in a plant-based meat product?

How do consumers react to plant-based meat ingredient lists?

Most common plant-based meat ingredient combinations registered as somewhat healthy to plant-based meat buyers, even if they contained some ingredients many subsequently said they would avoid. Lists with more positive than negative-rated ingredients and with those positive ingredients higher on the list were perceived as healthier overall. Rating patterns were similar among non-buyers, although the overall share of respondents rating products as healthy was slightly lower.

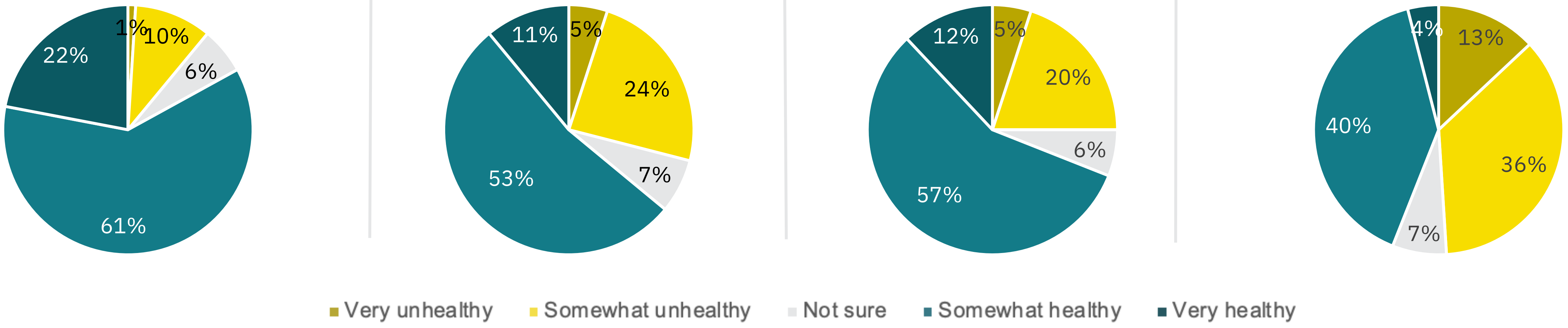
Perceived health of products with representative ingredient lists, among plant-based meat buyers

Pea protein, Avocado oil, Natural flavors, Brown rice protein, Red lentil protein, Methylcellulose

Soy protein, Vegetable oil, Salt, Natural flavor, Spices

Vital wheat Gluten, Tofu, Soy sauce, Canola oil, Natural flavors

Soy protein, Sunflower oil, Coconut oil, Natural flavors, Methylcellulose, Cultured dextrose, Food starch Modified, Yeast extract



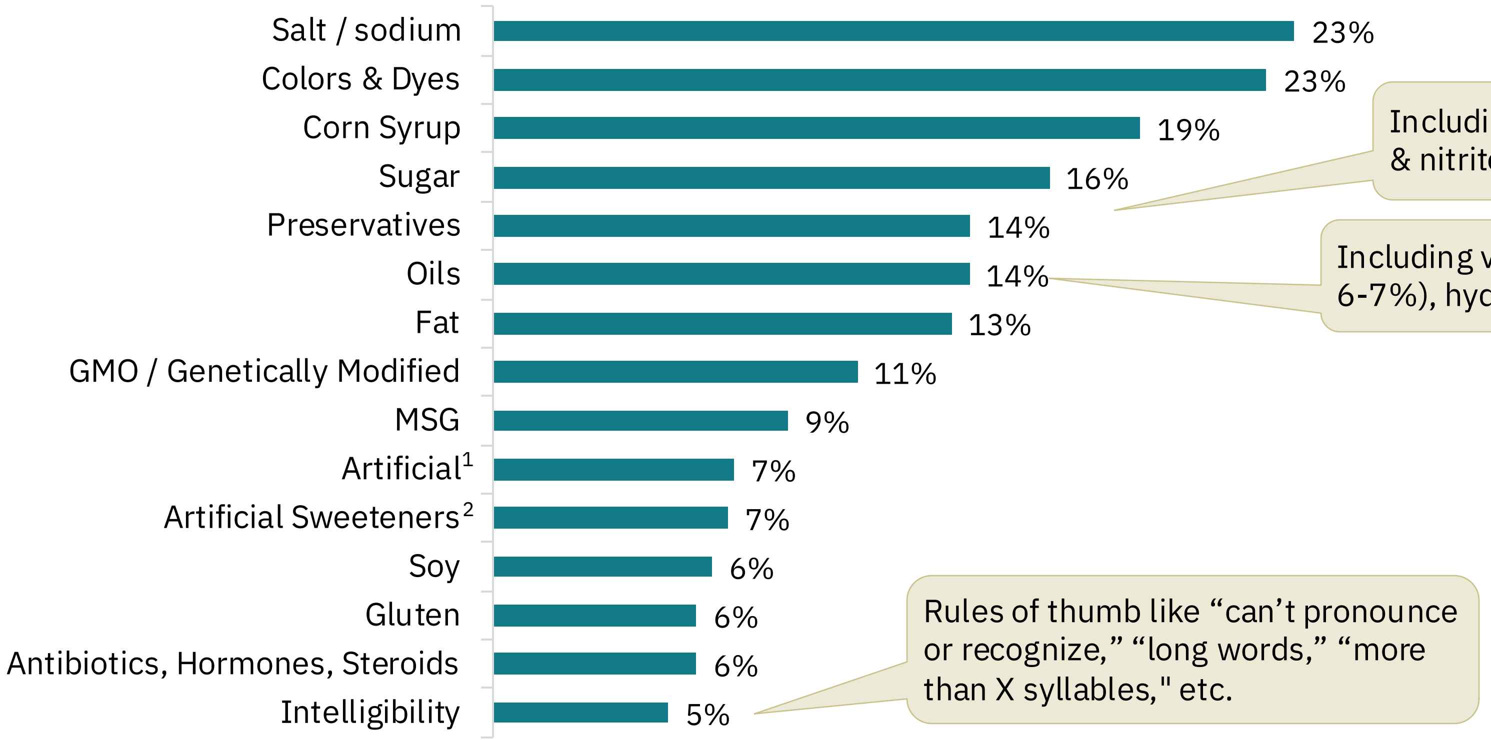
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year), March 2025

Imagine you were reading a label for a plant-based meat product and saw the following ingredients. Based on these ingredients, how healthy do you think this plant-based meat product would be?

What are consumers avoiding in their food, in their own words?

Salt/sodium, colors/dyes, sugar/corn syrup, and fats/oils, and preservatives are top of mind ingredients that consumers avoid.

Ingredients/nutrients consumers report avoiding (unaided)



Other mentions (1-5%)

- Binders and emulsifiers (gums, methylcellulose, etc.)
- Dairy/milk
- Meat from animals
- Carrageenan
- "Additives" (without specific reference to types)
- Processed foods generally
- Alt proteins (plant-based, lab-grown, fake, etc.)
- Pesticides (incl. glyphosate)

Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025.
As % of those who reported avoiding specific ingredients, n=1,552
Are there specific ingredients you (would) try to avoid? Manually grouped to cluster related concepts, contractions, and misspellings; 1) or a contraction like "corn syrup" or "HFCS"; 2) tofu, plant protein, TVP, "lab grown," etc.
[1] Including "artificial flavors" and references to "chemicals," "unnatural," and "lab/oratory" ingredients, excluding references to sweeteners or colors (included in "Colors & Dyes" and "Sweeteners" respectively); [2] Generally, and specific types or brands like sucrose, sucralose, dextrose, aspartame, stevia

How do consumers feel about GMOs?

A segment of consumers is concerned about GMOs and spends more on plant-based meat if they feel it is non-GMO.

Over a third of plant-based meat buyers and non-buyers (40% and 37% respectively) indicate non-GMO is an attribute they consider when choosing meat, conventional or plant-based. Consumers who feel plant-based meat does "very well" at being non-GMO spend more than average, and being non-GMO is among the top factors consumers say would make them more likely to consider plant-based meat (or eat it more).

A 2024 survey by Research America found that 37% of consumers feel genetically modified foods are worse for health. However, perceptions are mixed. Almost half (47%) don't feel genetically modified foods are better or worse for health, and 16% feel they are better. Perceptions may be evolving—the same survey found that younger consumers are more likely to have positive attitudes about genetically modified foods, with 36% of those aged 18 to 24 saying they are better for health.

Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Research America, 2024 Food and Nutrition Survey. When it comes to your health, do you feel genetically modified foods are better or worse than foods with no genetically modified (non-GMO) ingredients?

Non-GMO claims are common on plant-based meat products today.

According to SPINS, 48% of plant-based meat dollar sales in 2024 were from products labeled non-GMO (compared to 41% from products not labeled; 6% had no information).

For comparison, among conventional packaged refrigerated and frozen meat products with claims information captured, only 8% of 2024 retail sales were from products labeled non-GMO.

SPINS, Plant-based - SPINS Natural Enhanced Channel + Conventional Multi Outlet Channel + Convenience Channel (powered by Circana), plant-based categories were created by refining standard SPINS categories, Conventional Meat - Frozen and Refrigerated Meat, Poultry, and Seafood - Conventional Multi Outlet Channel; 52 weeks ending 12/1/2024.

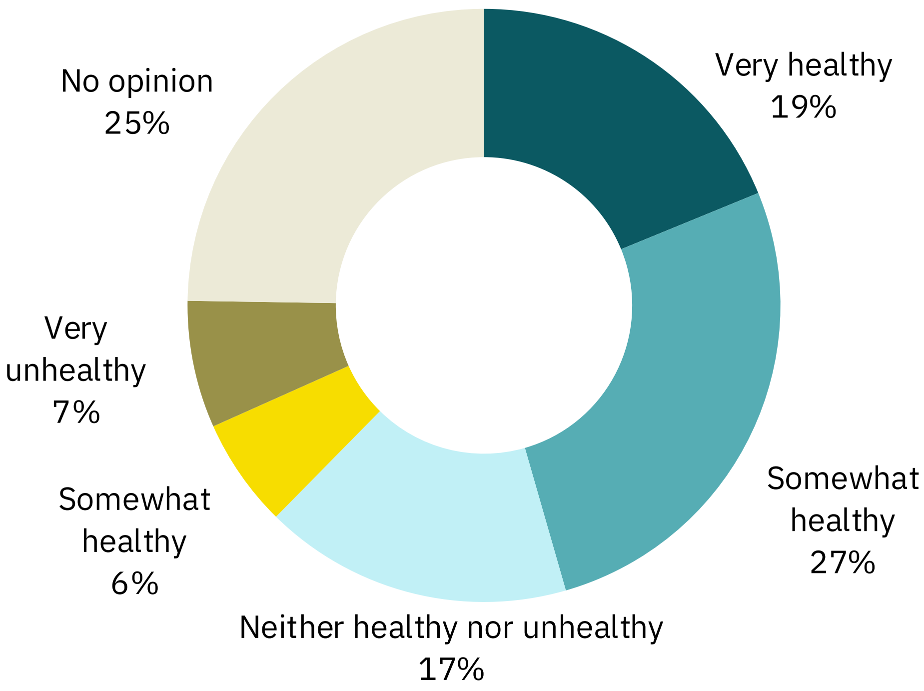
How do consumers feel about seed oils?

Research suggests that consumers are not widely avoiding seed oils today.

Of the consumers who indicated they pay attention to specific ingredients or additives, only about 3% said (unaided) that this includes “seed oils” or any type of oil commonly considered a seed oil. When reviewing common plant-based meat ingredients, consumers were more likely than not to say they avoid canola and vegetable oil than other seed oils.

Research by the International Food Information Council in 2025 found that when Americans were prompted directly “do you avoid seed oils,” only a minority agreed (28%). Almost half said seed oils are healthy, while only 13% said unhealthy. Most said what they have heard about seed oils is all or mostly positive (44%), or they haven’t heard much at all (27%).

U.S. consumers opinion on how healthy it is to consume seed oils



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
International Food Information Council (IFIC). IFIC Spotlight Survey: Americans' Perceptions Of Seed Oils. February 2025. In your opinion, how healthy is it to consume seed oils? (n=1000)

How do “no antibiotics/hormones” claims influence consumers?

While not ingredients per se, antibiotics and hormones are substances that many consumers look to avoid in meat.

Roughly half of consumers say that avoiding antibiotics and hormones is very important when they are choosing meat. While plant-based is perceived to deliver well on not having antibiotics/hormones, and consumers who care about avoiding antibiotics/hormones spend more than average on plant-based meat, there is still a gap—more consumers think this attribute is important then rate plant-based meat as delivering “very well.”

Messaging may be important to communicate to consumers that plant-based meat is naturally antibiotic/hormone-free.

In qualitative research, consumers revealed that they may not understand the extent to which antibiotics and hormones are used in conventional meat production or may feel that they can fully avoid them by choosing certain types of meat. Consistent with this, survey respondents rated plant-based and conventional chicken similarly on being free of antibiotics and hormones.

Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Focus groups and digital ethnographies with n=42 frequent/occasional/lapsed plant-based meat consumers in Chicago and Los Angeles, 2024

Conventional meat products widely use antibiotic and hormone-free claims.

According to SPINS, among conventional refrigerated and frozen packaged meat products with label information captured, “antibiotic free” and “no added hormones” are the top claims.

- Products with an “antibiotic free” claim accounted for 24% of 2024 retail dollar sales. Almost all (92%) also had a “no hormones added” claim.
- Dollar sales of products with these claims increased from 2022 to 2024.

SPINS, Conventional Meat - Frozen and Refrigerated Meat, Poultry, and Seafood - Conventional Multi Outlet Channel; 52 weeks ending 12/1/2024.

Processing

Key findings

Do concerns about processed foods drive consumer choice?

Consumers express conflicting opinions about processed foods.

Most consumers claim they try to avoid processed foods. At the same time, many agree processed foods are safe in moderation. While a third of buyers say they would choose plant-based meat more if it was less processed, a quarter already feel it is minimally processed.

Most are unsure if they even know what processed means.

Consumers described various proxies they use to evaluate if a food is processed, often based on the ingredients. Examples include a “high” number of ingredients, unfamiliar ingredients, additives, or preservatives. Products that are manufactured or made in a way that’s not understood may also be seen as processed.

Concerns with processed foods impacts *some* spend.

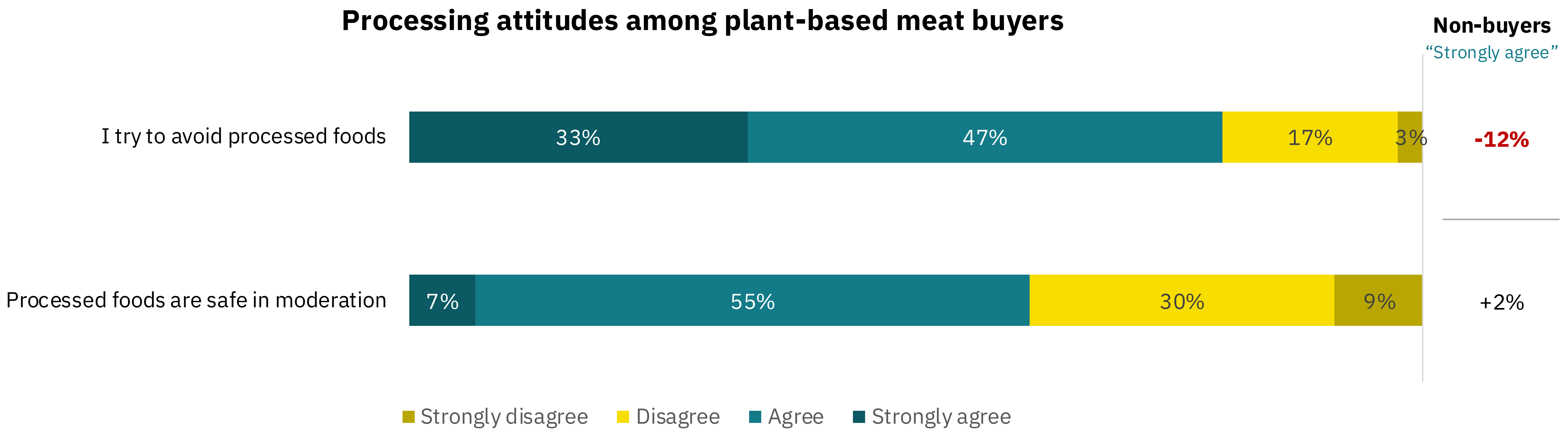
Consumers who claim that they avoid processed foods still spend a lot on them but less than those who don’t say they avoid processed foods.

Some plant-based meat buyers say they would buy more if it was less processed. However, purchase data suggests that this does not have a significant impact for many buyers today. Non-buyers are less likely to say processing is a barrier and more frequently say they simply don’t see a reason to eat plant-based meat.

Buyers who say they avoid processed foods do not spend less on plant-based meat than those who don’t.

What are consumers' attitudes toward processed foods?

Plant-based meat buyers are more likely to say they avoid processed foods than non-buyers. However, buyers often have conflicting opinions about processing. While a majority say they try to avoid processed foods, a majority also say they are safe in moderation.



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
For each of the following, how much do you personally agree with these statements? *(Select one for each)*

How do consumers evaluate if a food is "processed"?

Consumers have ambiguous perceptions of processed foods.

"Processed" is often linked to ingredients. In qualitative research, consumers referenced using various proxies to assess if a product is processed:

- "High" number of ingredients
- Ingredients that are unfamiliar or hard to pronounce
- Additives or artificial ingredients (e.g., high-fructose corn syrup, aspartame, MSG, and colors/dyes)
- Preservatives (and long shelf life)

Perceptions of manufacturing and technology also link to processed.

Some qualitative research participants referenced foods that are manufactured versus grown or packaged versus fresh as being processed, which both apply to plant-based meat.

"You can't grow a plant-based meat."

Plant-based meat was also seen by some as a "new technology." Combined with lack of understanding around how the products are made, this reinforced associations with being processed.

70%

Of U.S. adults are unsure if they fully understand what a processed food is

International Food Information Council

68%

Of U.S. adults are unfamiliar with the term "ultraprocessed food" (or not sure)

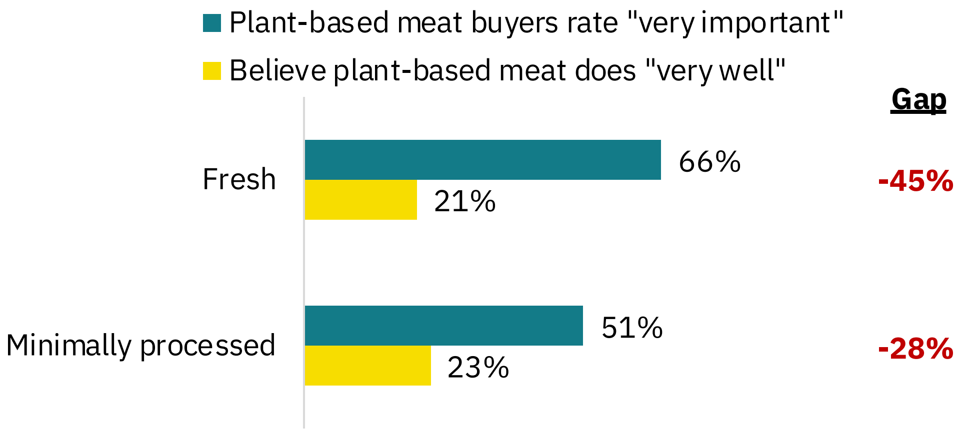
International Food Information Council

Focus groups and digital ethnographies with n=42 frequent/occasional/lapsed plant-based meat consumers in Chicago and Los Angeles, 2024
International Food Information Council, 2024 Consumer Research: Public Perceptions of Processed Foods; International Food Information Council, 2024 Food & Health Survey

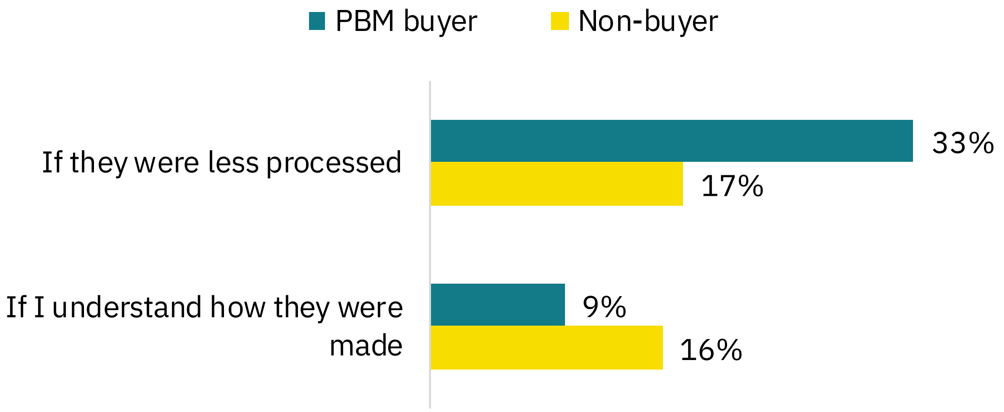
How do consumers perceive plant-based meat on being processed?

Among plant-based meat's biggest gaps relative to consumers' needs are being fresh and minimally processed—although a quarter of buyers already perceive plant-based meat to be minimally processed. Some consumers say they would be likely to buy plant-based meat more if it was less processed, although this is less prevalent among those not buying today. On the other hand, non-buyers are more likely to say they would consider buying if they understood better how plant-based meat is made. Previous research found that consumers who have never tried plant-based meat are almost twice as likely to say this is because they don't see a reason than because the products are too processed.

Which consumer needs are gaps/strengths for plant-based meat?



What would lead consumers to buy (more) plant-based meat products (top 5)?



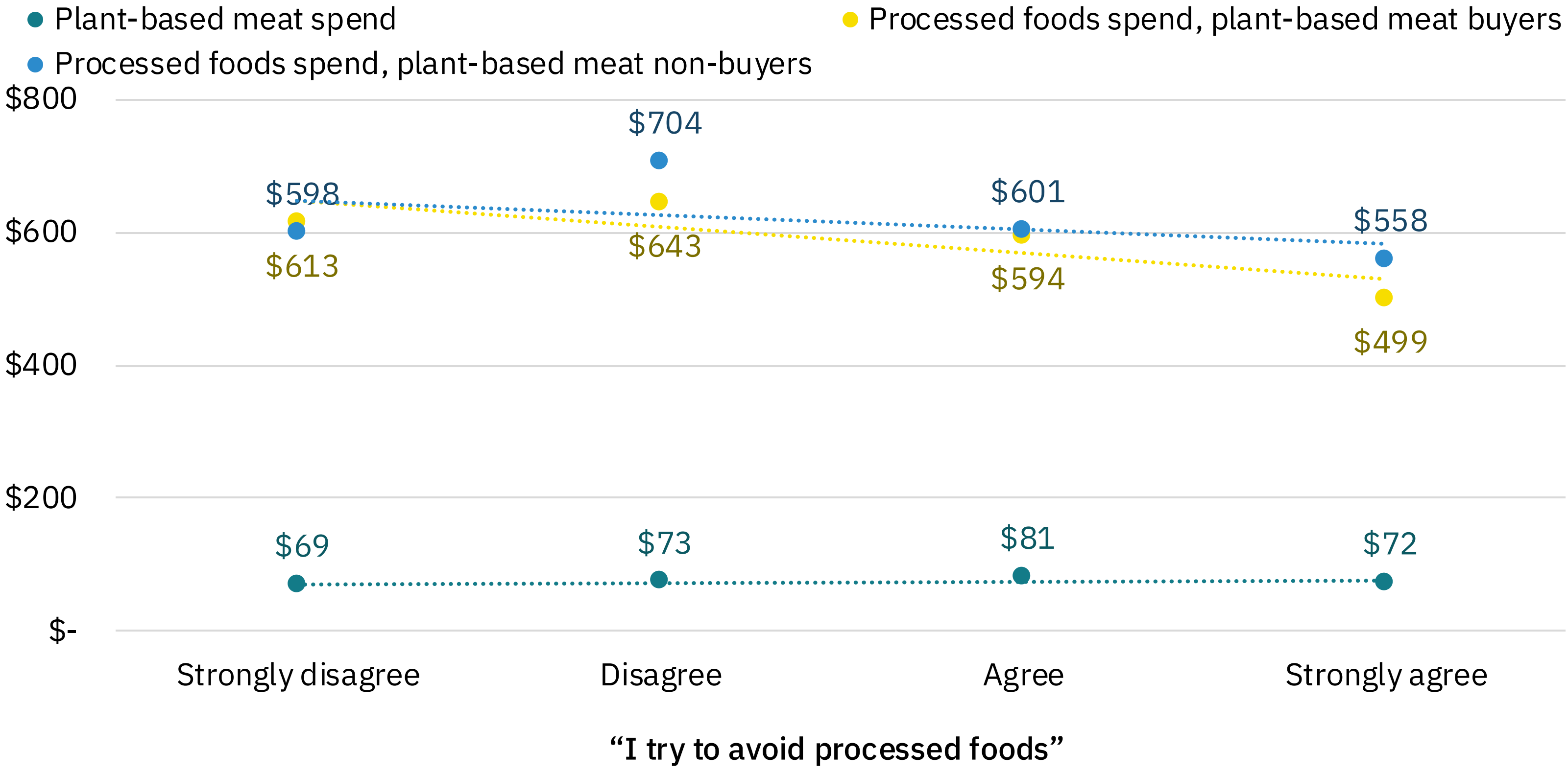
Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
Left chart: When you are choosing meat products to buy, conventional and/or plant-based, how important are the following to you?; Thinking about the [Plant-based beef like Beyond Meat or Impossible Burger/ Plant-based chicken like Impossible nuggets or Gardein chick'n] you typically buy or are familiar with, which of the following do you think the products do a very good job of delivering? (*Select all that apply)* weighted average of n=1,037 who answered about plant-based beef and n=704 who answered about plant-based chicken; Subset of responses shown. Right chart: For current buyers/eaters: What, if any, of these reasons would make you consider buying more plant-based meat products? (*Select at least 1 and up to 5);* For non-buyers/eaters: What, if any, of these reasons would make you more likely to consider buying plant-based meat products? (*Select at least 1 and up to 5);* Subset of responses shown

Does concern with processed foods drive purchase behavior?

Consumers who express that they avoid processed foods still spend a significant amount on them. But they spend less than those who don't say they avoid processed foods. This is especially true for plant-based meat buyers, who tend to be more health focused in general.

However, plant-based meat buyers who say they avoid processed foods do not spend less on plant-based meat, suggesting they either do not see it as too processed or choose it for other reasons despite this.

Consumers' spending on plant-based meat and processed foods, by whether they claim to avoid processed foods



Survey of n=2,220 U.S. adult plant-based meat consumers (verified purchasers and claimed eaters in past year) and n=621 non-consumers (non-retail purchasers and claimed non-eaters), March 2025
For each of the following, how much do you personally agree with these statements? *(Select one for each)*
Circana, Complete Consumer® Scan Panel, 260 weeks ending April 2025. Categories: Processed = Frozen Pizza, Instant Breakfasts, Toaster Pastries, Dinner Mixes (e.g. Hamburger Helper), Cookies & Cookie Doughs, Pastries (Pies Cookies Cakes Muffins etc.), Frozen Desserts & Toppings, Fries/Onion Rings, Salty Snacks (Potato Chips, Pork Rinds, Pretzels, Etc.). Plant-based meat = Refrigerated, Frozen & Single Serving Meat Alternatives.

Acknowledgements

Authors

Taylor Leet-Otley, Senior Consumer Research Lead

Jody Kirchner, Associate Director of Market Insights

Editors

Chelsea Hammersmith, Content Specialist

We would like to thank **Circana** and **The Sage Network** for their contributions to this work.

About GFI

The Good Food Institute is a nonprofit think tank working to make the global food system better for the planet, people, and animals. Alongside scientists, businesses, and policymakers, GFI's teams focus on making plant-based and cultivated meat delicious, affordable, and accessible. Powered by philanthropy, GFI is an international network of organizations advancing alternative proteins as an essential solution needed to meet the world's climate, global health, food security, and biodiversity goals.
To learn more, please visit gfi.org.

POWERED BY PHILANTHROPY
GFI is a nonprofit 501(c)3 organization.

gfi.org