



U.S. foodservice market insights for plant-based foods

2021–2025



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Foodservice is a key channel for plant-based foods

Foodservice is an important channel for plant-based companies to reach consumers, and offering plant-based dishes allows foodservice operators to attract the many diners interested in plant-based eating.

By delivering accessible and often elevated experiences, foodservice can drive awareness and engagement with the plant-based category.

- **Put the best foot forward.** Professionally prepared dishes bring plant-based ingredients to life in delicious and creative ways.
- **Reach consumers on more occasions.** Availability across retail and foodservice increases awareness and accessibility, enabling consumers to choose plant-based more often.
- **Attract valuable diners.** Plant-based meat buyers visit restaurant chains more often and spend more annually.



Key findings

The state of foodservice in 2025

Consumer affinity for eating out remains strong.

The foodservice industry has stabilized since the COVID-19 pandemic, with steady growth over the past three years.

Circana data on total food operator purchases from broadline distributors showed three percent dollar sales growth and one percent pound sales growth in 2025. Among the protein and dairy categories GFI tracks, four out of five conventional categories and two out of five plant-based categories experienced pound sales growth from 2024 to 2025.

Foodservice is facing inflation, labor, and supply challenges.

The foodservice sector continues to navigate challenging economic pressures. According to the Bureau of Labor Statistics, away-from-home prices rose faster than retail prices due to increased food and labor costs. Inflation, product supply, and tariffs impacted ingredient costs, while labor and operational costs also rose. Foodservice outlets continue to balance margins with customer value.

+3%

2025 growth in foodservice dollar sales from operators to broadline distributors

+1%

2025 growth in foodservice pound sales from operators to broadline distributors

Circana

Key findings

Plant-based dairy and eggs in foodservice



Image courtesy of Eleni K. Chalmers

Plant-based milk and creamer experienced continued growth.

Plant-based milk dollar sales to broadline distributors were up 16 percent and pound sales up 14 percent in 2025, according to Circana. Conventional milk sales grew at a slower pace, allowing plant-based milk to reach a 13 percent share of total milk pound sales, up from 12 percent in 2024.

Plant-based creamer grew four percent in dollar sales and three percent in pound sales and accounted for 28 percent of total creamer pound sales.

Plant-based milk and creamer likely benefited from coffee chains eliminating plant-based surcharges. Removing surcharges and offering plant-based as the default has been linked to increased sales.

Plant-based cheese saw losses.

Plant-based cheese declined 15 percent in dollar and pound sales in 2025. Closing gaps on taste and texture will be critical to plant-based cheese gaining dollar share of the substantial foodservice cheese market, which is over seven times the size of milk.

Plant-based eggs are an emerging category.

Plant-based eggs remain small in foodservice with under \$10 million in broadline distributor sales, accounting for less than a one percent pound share of the total egg market. Following several years of strong growth, pound sales declined in 2025 while dollar sales grew on price increases.

Key findings

Plant-based proteins in foodservice



While plant-based protein sales declined, some formats and operator segments saw growth.

The plant-based proteins category—which includes analog meat and seafood, tofu, tempeh, and grain/nut/veggie items—saw dollar sales to broadline distributors down seven percent and pound sales down five percent in 2025, according to Circana.

Notable plant-based analog bright spots included the plant-based pork category, up three percent in pound sales, and specific formats, including plant-based chorizo sausage crumbles, chicken nuggets, and pork crumbles, all up double digits in pound sales in 2025.

Grain/nut/veggie items grew six percent in 2025, likely driven in least in part by an average price per pound decrease of six percent.

Non-commercial operators represent a growing target.

While restaurants remain the largest purchaser of plant-based proteins, sales to education, healthcare, business and industry, and government operators grew in 2025. Implementation of default plant-based strategies by some non-commercial operators may be one factor driving growth.

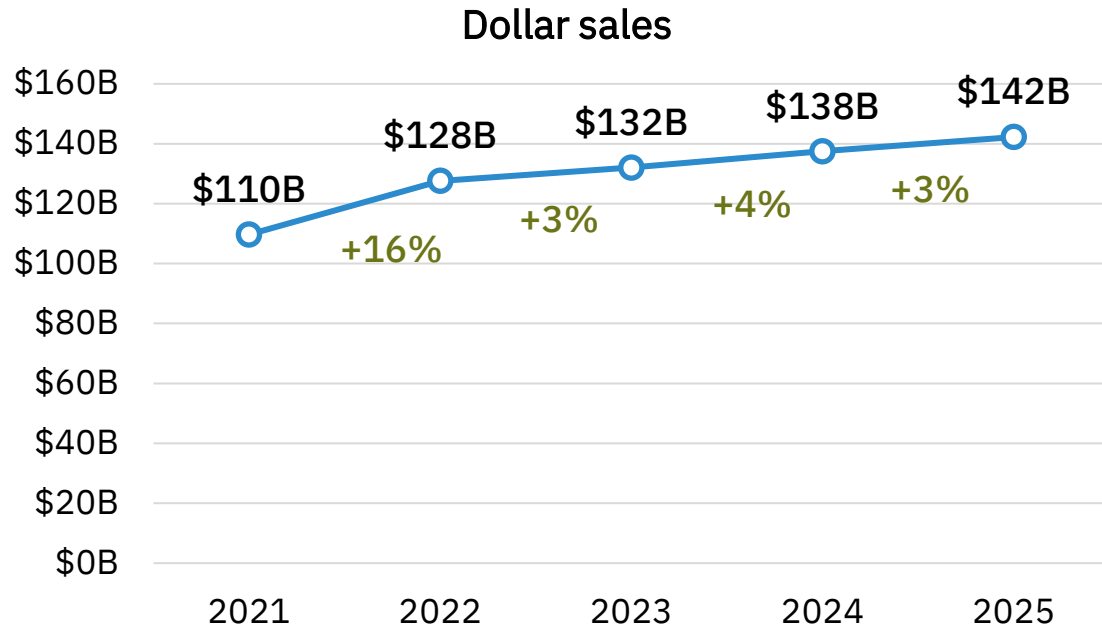
Plant-based meat analog diners are valuable.

Plant-based meat diners visit restaurant chains more often and spend more annually than other diners. In 2025, they ordered plant-based meat items an average of just 2.6 times, highlighting a significant opportunity to capture more of their eating out occasions by offering compelling plant-based meat dishes.

Overall foodservice market landscape

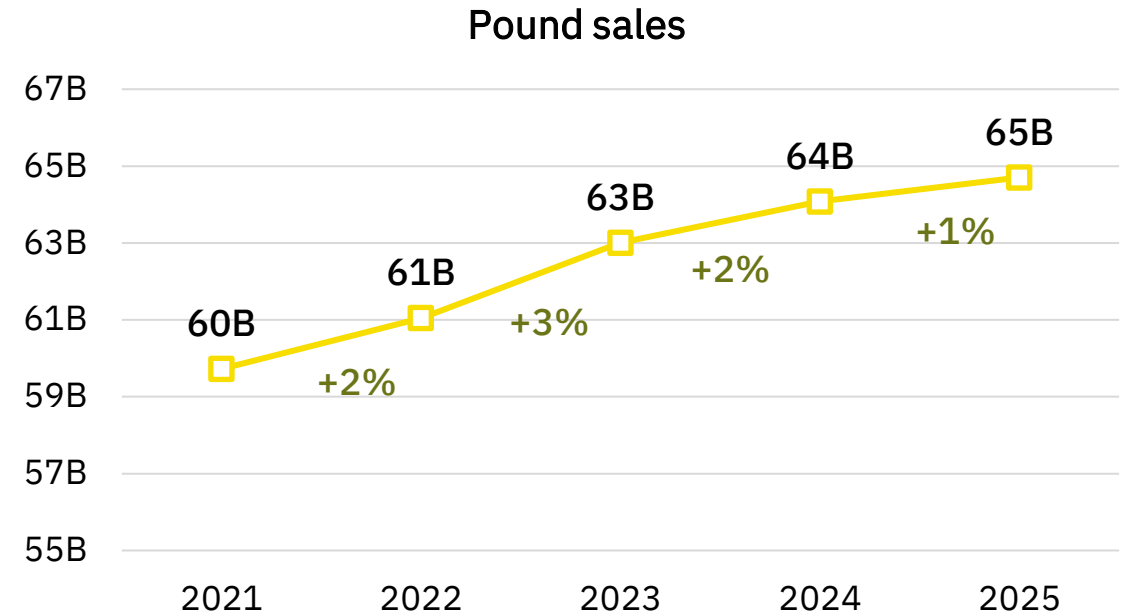
Foodservice dollar and pound sales grew slightly in 2025

Circana data on total food operator purchases from broadline distributors shows that dollar sales increased by three percent, while pound sales increased by one percent in 2025. The gap between dollar and pound sales growth in recent years reflects the impact of inflation on prices. The average food price-per-pound from distributors to operators increased 20 percent between 2021 and 2025, with most of that increase, 14 percent, happening from 2021-2022.



+30%
4-year growth

+7%
4-year CAGR

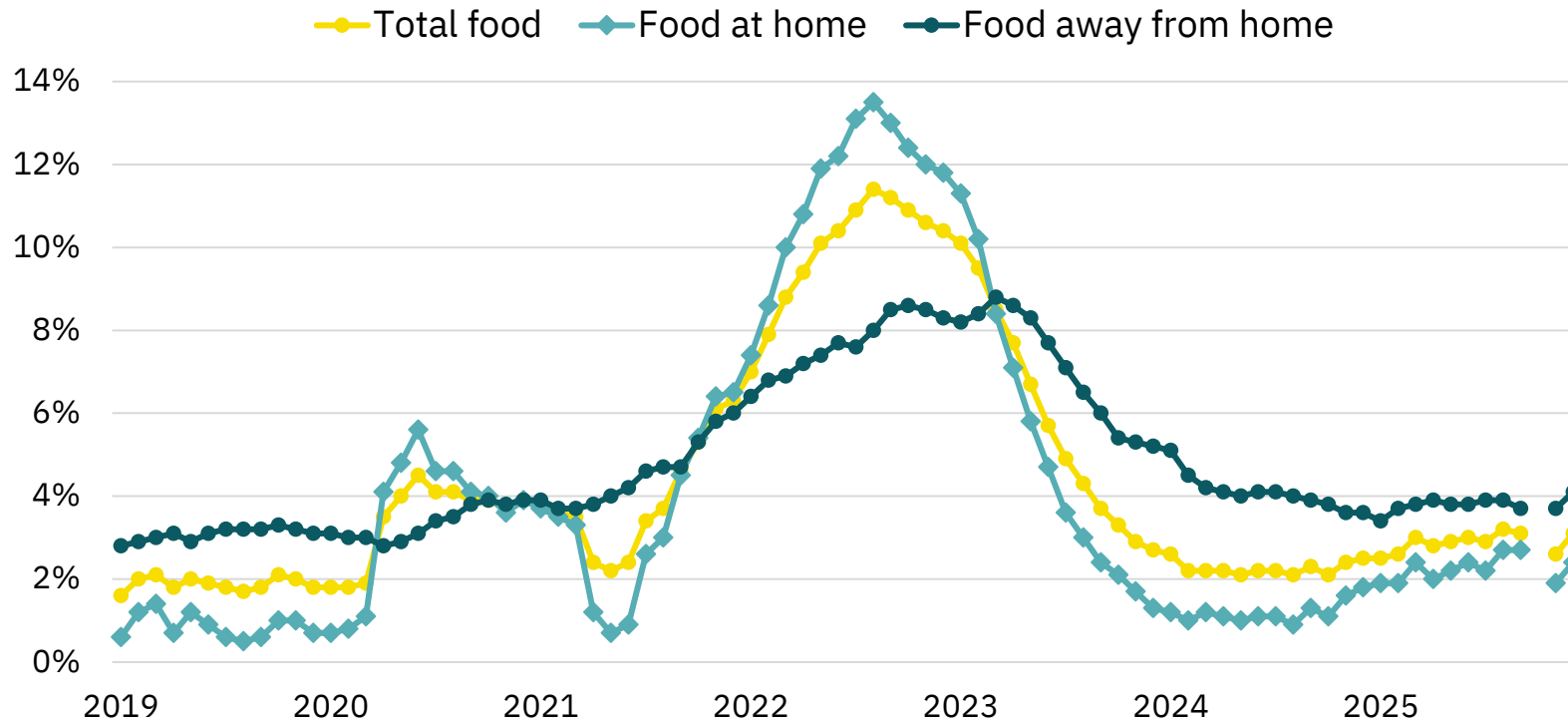


+8%
4-year growth

+2%
4-year CAGR

Dining out price increases continue to outpace retail price increases

U.S. Consumer Price Index – Food (monthly % change v. year ago)



Economic struggles and labor increases from farmers to grocers, among other factors, have led to price increases across all food channels.

Food away from home continues to outpace price increases for food at home.

Plant-based category performance

Plant-based milk and creamer are performing strongly in foodservice while other plant-based categories have room to grow share



#1

Plant-based categories had varied performance in 2025

Plant-based milk, creamer, and egg categories grew in dollar sales in 2025 while plant-based proteins and cheese declined.

#2

Plant-based milk and creamers continued to grow

Plant-based milk grew 16 percent in dollar sales and creamer grew four percent in 2025. Both plant-based milk and creamer hold double digit pound shares of their respective total categories.

#3

Plant-based price premiums persist, with slight improvement

Plant-based protein analogs and plant-based milk are priced 60-70 percent higher than conventional counterparts. However, in 2025, the price gap for proteins decreased slightly, largely due to increased conventional meat prices.

Foodservice sales performance varied across plant-based categories in 2025

Plant-based milk and creamer continued to show strong growth in dollar and pound sales, with double-digit milk growth rates surpassing rates from 2024. Plant-based proteins are the largest plant-based category in terms of broadline distributor dollar sales in foodservice but experienced sales declines in 2025.

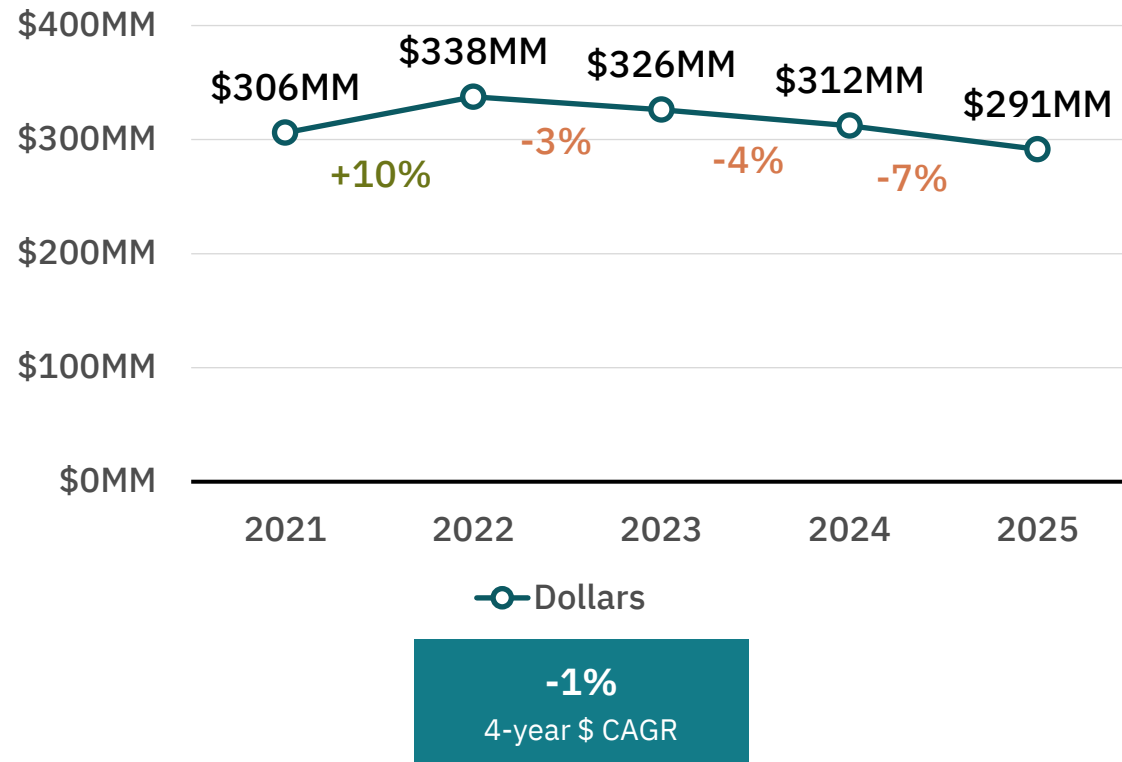
Broadline distributor foodservice sales by plant-based category in 2025

	Dollar sales	Change vs. 2024	Pound sales	Change vs. 2024
Plant-based proteins	\$291 MM	-7%	59 MM	-5%
Plant-based milk	\$288 MM	+16%	198 MM	+14%
Plant-based creamer	\$189 MM	+4%	68 MM	+3%
Plant-based cheese	\$27 MM	-15%	6.9 MM	-15%
Plant-based eggs	\$7.0 MM	+5%	1.1 MM	-3%

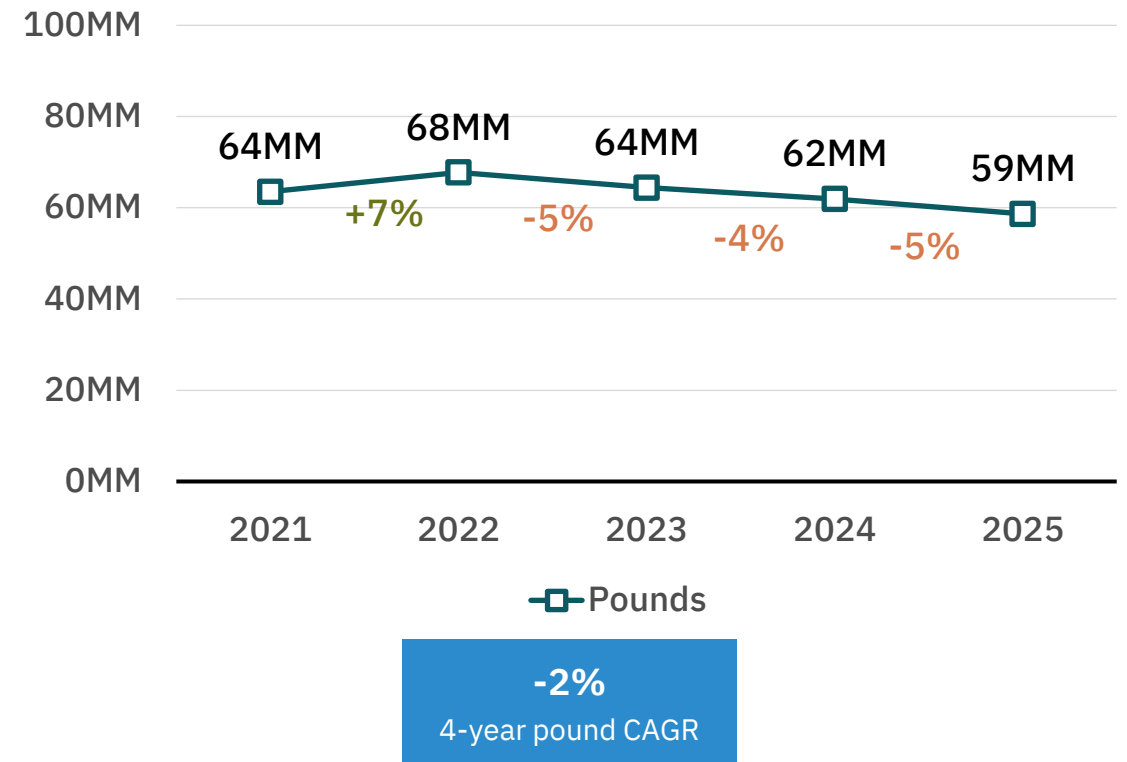
Plant-based protein sales are down over the last three years

Plant-based protein sales were down seven percent in dollar and five percent in pound sales in 2025. The category has declined since highs in 2022 that marked the foodservice sector's rebound after the drop in sales due to the COVID-19 pandemic.

Plant-based proteins dollar sales



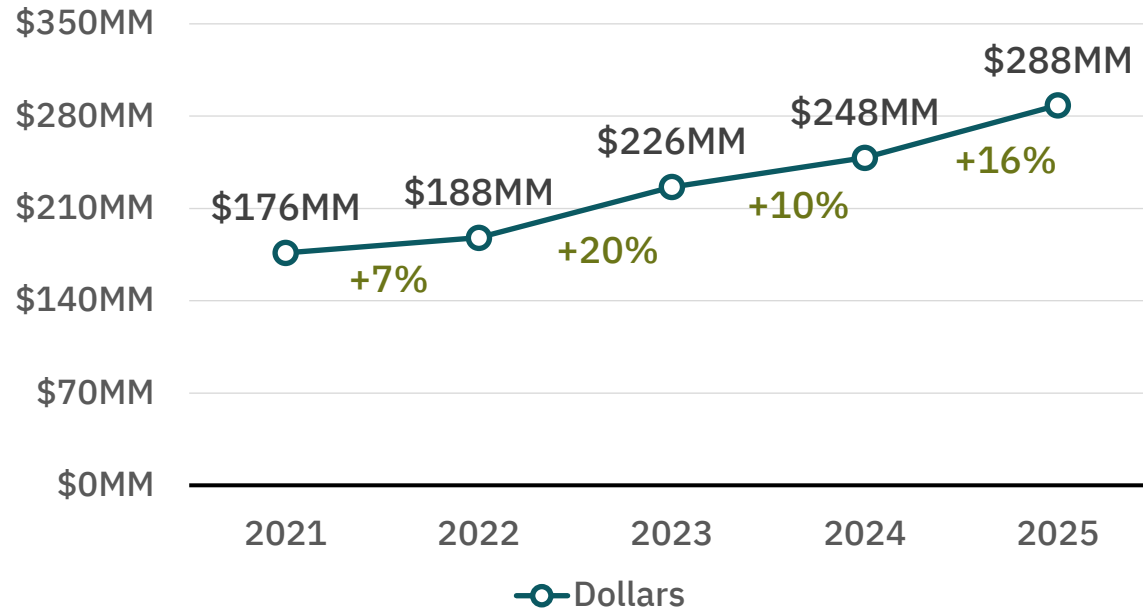
Plant-based proteins pound sales



Plant-based milk continues to grow in foodservice

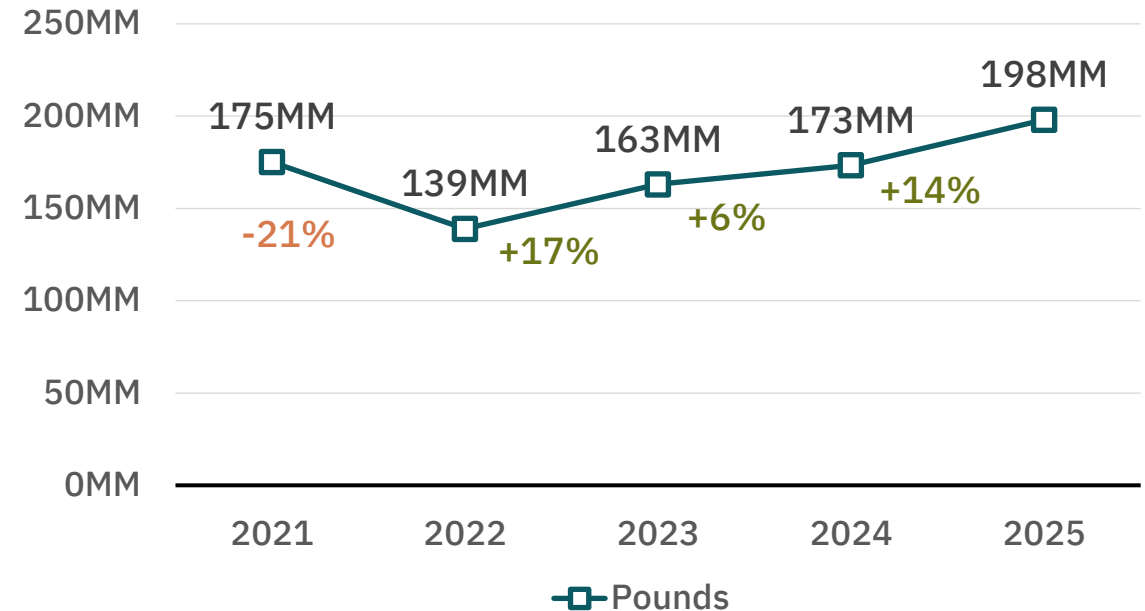
Following several years of steady growth, 2025 was another strong year for plant-based milk sales. Dollar sales were up 16 percent and pound sales were up 14 percent.

Plant-based milk dollar sales



+13%
4-year \$ CAGR

Plant-based milk pound sales

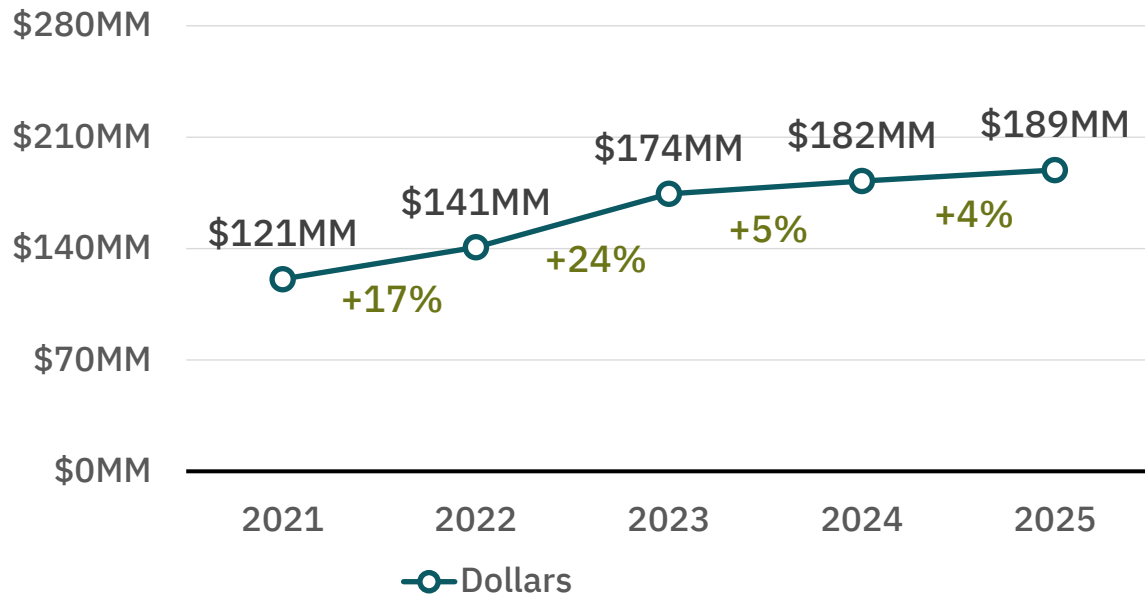


+3%
4-year pound CAGR

Plant-based creamer has also grown in recent years

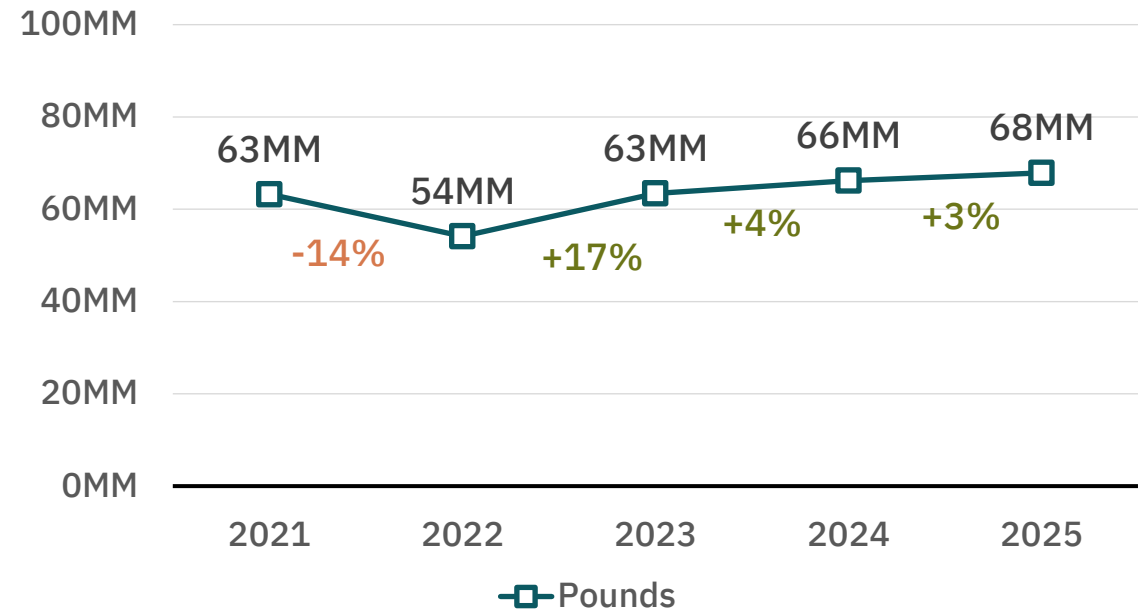
Plant-based creamer dollar and pound sales have increased over the past four years. In 2025, plant-based creamer dollar sales were up four percent and pound sales up three percent.

Plant-based creamer dollar sales



+12%
4-year \$ CAGR

Plant-based creamer pound sales



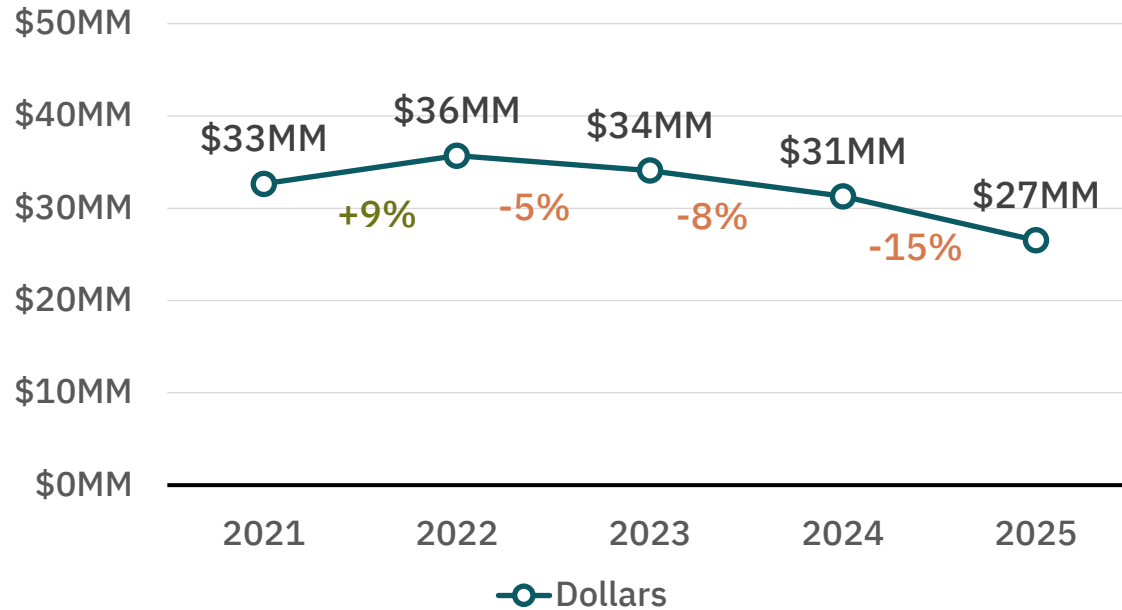
+2%
4-year pound CAGR

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Creamer alternatives. Dollar and pound sales are 12 months ending December 2025 vs 4 prior years..

Plant-based cheese sales continue to decline

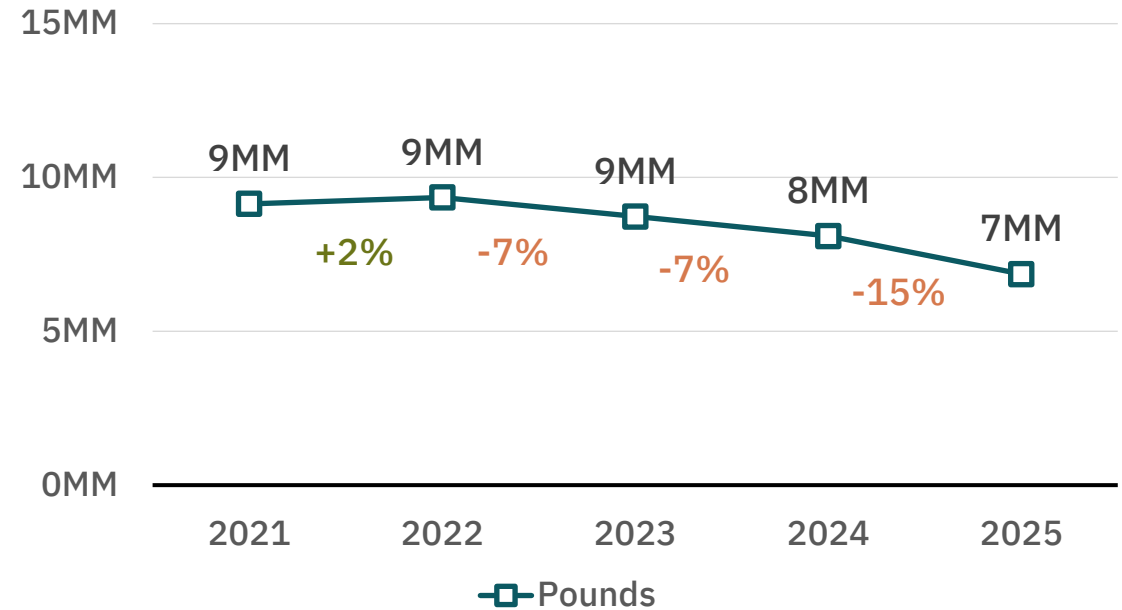
Plant-based cheese experienced declines in both dollar and pound sales over the last three years. Dollar and pound sales were both down 15 percent in 2025.

Plant-based cheese dollar sales



-5%
4-year \$ CAGR

Plant-based cheese pound sales

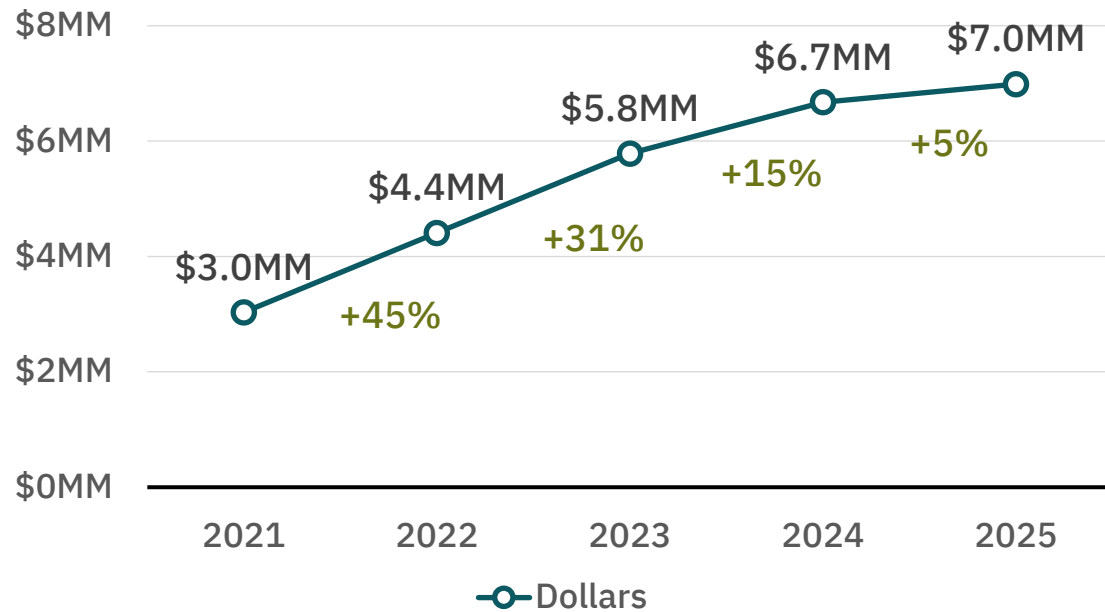


-7%
4-year pound CAGR

Plant-based eggs is an emerging category

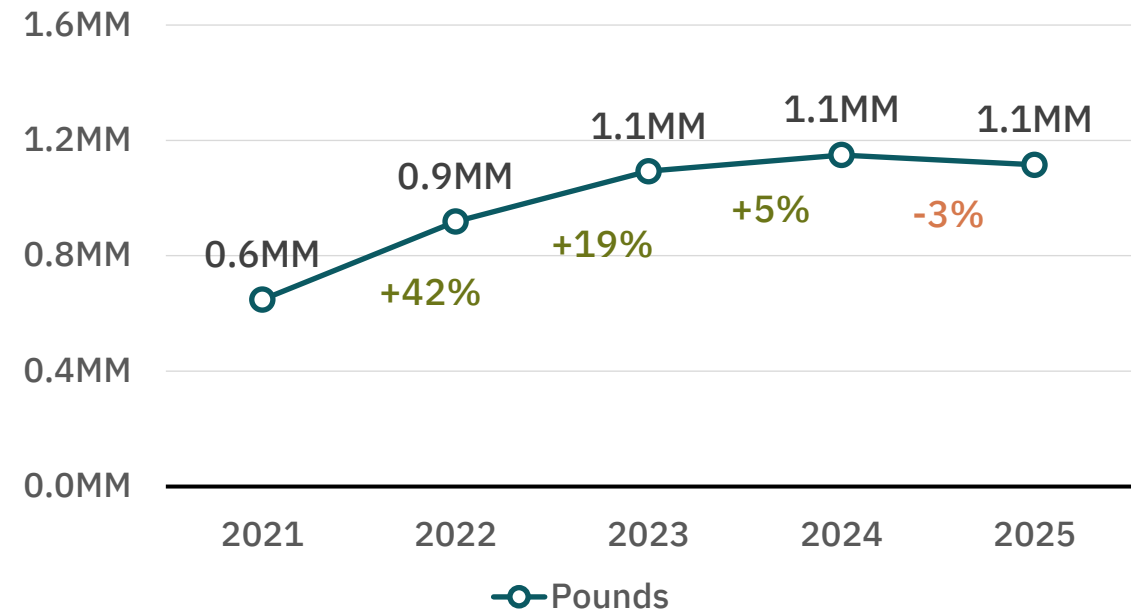
Plant-based eggs were up five percent in dollar but down three percent in pound sales in 2025. While the category may have benefited from volatility in the conventional egg market due to outbreaks of highly pathogenic avian influenza, usage has leveled as plant-based egg prices continue to increase, reaching over six dollars per pound in 2025.

Plant-based eggs dollar sales



+23%
4-year \$ CAGR

Plant-based eggs pound sales



+15%
4-year pound CAGR

Plant-based milk grew faster than conventional milk in 2025

Plant-based milk growth outpaced animal-based milk in 2025. Plant-based eggs, though a small category, grew faster than conventional eggs over the last four years. Plant-based proteins and cheese have lagged conventional counterparts on growth in recent years, with taste and price consistently identified as key barriers to consumer adoption.

Broadline distributor plant-based vs. animal-based pound sales and growth

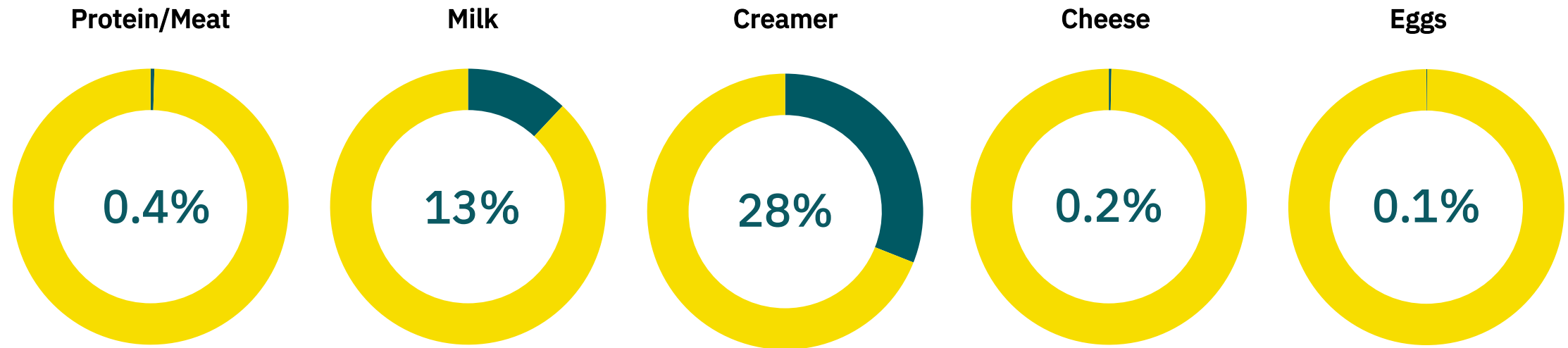
	Plant-based			Animal-based		
	Pound sales 2025	Change vs. 2024	4-year pound sales CAGR	Pound sales 2025	Change vs. 2024	4-year pound sales CAGR
Protein/Meat	59 MM	-5%	-2%	15.0 B	2%	+2%
Milk	198 MM	+14%	+3%	1.3 B	+4%	+5%
Creamer	67.9 MM	+3%	+2%	177 MM	+10%	+7%
Cheese	6.9 MM	-15%	-7%	3.0 B	+0%	+2%
Eggs	1.1 MM	-3%	+15%	1.4 B	-1%	+3%

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Plant-based proteins (analog meat alternatives), Animal-based meat (poultry, beef, pork, seafood, hot dogs/sausage/specialty meat), Milk alternatives, Conventional milk, Creamer alternatives, Conventional creamer, Cheese alternatives, Conventional cheese, Egg alternatives, Conventional eggs. Dollar and pound sales are 12 months ending December 2025.

Plant-based creamer has the largest foodservice plant-based share

Plant-based milk and creamer hold meaningful shares of their respective total categories in foodservice, driven in large part by the popularity of plant-based options in the coffee and tea industry. Plant-based proteins and other categories remain small in the context of their respective total category size. Overall, plant-based shares in 2025 were comparable to 2024 values.

Plant-based share of total foodservice category (% pounds sold by broadline distributors)

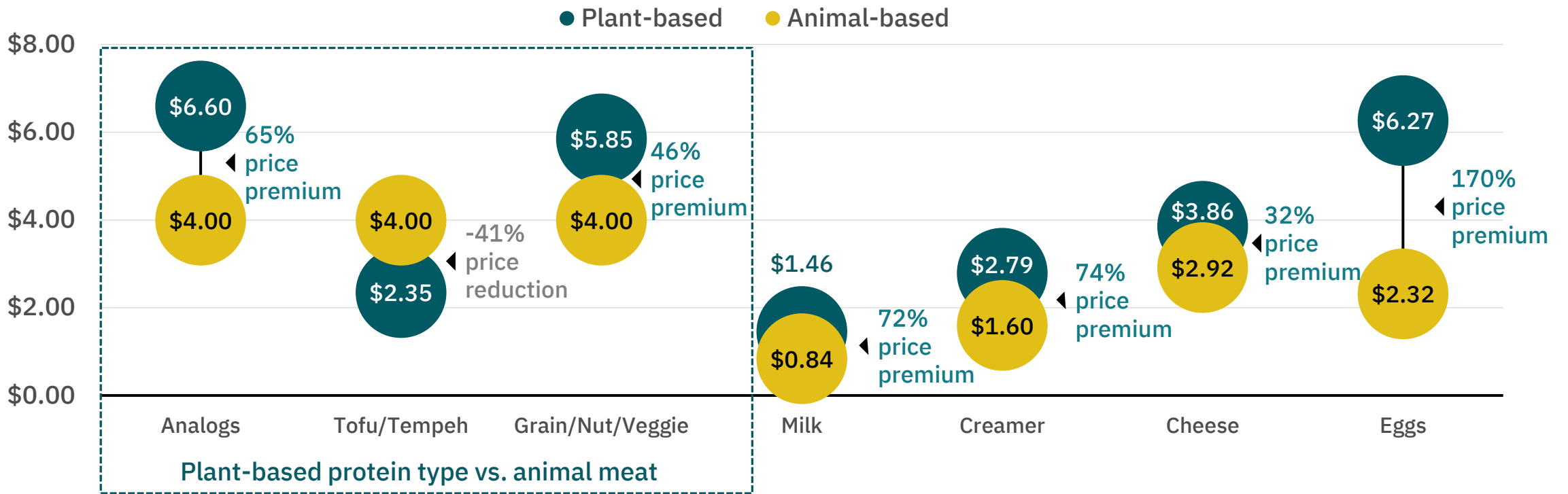


Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales. Plant-based proteins (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh), Animal-based meat (poultry, beef, pork, seafood, hot dogs/sausage/specialty meat), Cheese alternatives, Conventional cheese, Milk alternatives, Conventional milk, Creamer alternatives, Conventional creamer, Egg alternatives, Conventional Egg. Dollar and pound sales are 12 months ending December 2025 vs 4 prior years.

Plant-based products are mostly premium priced to conventional counterparts

Plant-based meat analogs and milk are priced 60 percent to 70 percent higher than their conventional counterparts. Plant-based eggs have the largest price difference, although the gap has fluctuated due to outbreaks of highly pathogenic avian influenza that have driven up the price of animal eggs.

Plant vs. animal-based broadline distributor price per pound 2025 comparison



Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Plant-based proteins (analog meat alternatives), Animal-based meat (poultry, beef, pork, seafood, hot dogs/sausage/specialty meat), Milk alternatives, Conventional milk, Creamer alternatives, Conventional creamer, Cheese alternatives, Conventional cheese, Egg alternatives, Conventional eggs. Dollar and pound sales are 12 months ending December 2025.

Some plant-based price gaps shrank slightly in 2025

Animal-based meat price per pound to broadline distributors increased while the price per pound for plant-based protein analogs dropped slightly, helping to shrink the price gap. Animal-based creamer prices fell while plant-based creamer prices rose by one percent in 2025. Both conventional and plant-based eggs saw large price increases.

Plant-based vs. animal-based broadline distributor price per pound change 2024-2025

	Plant-based price/pound change	Animal-based price/pound Change	Price gap change (percentage points)
Protein/Meat	-1%	+4%	-7pt
Milk	+2%	+2%	0pt
Creamer	+1%	-7%	+14pt
Cheese	0%	0%	0pt
Eggs	+8%	+15%	-15pt

Plant-based proteins deep dive

Analogs continue to be a large share of plant-protein sales in foodservice, and growing formats and channels point to opportunities

#1

Analogs largest plant-based protein segment

Analogs account for more than half of plant-based protein pound sales, reflecting consumer preference for products that mimic the taste and functionality of animal meat.

#2

Beef substitutes dominate; pork growing

Plant-based beef substitutes still account for the majority (about 60 percent) of analog pound sales, though pork substitutes and select chicken formats grew in 2025.

#3

Soy is the most common ingredient

Products with soy protein as the main ingredient represented more than half of plant-based protein pound sales in 2025. Vegetable and pea protein-based products accounted for almost a quarter of sales.

#4

Non-restaurant operators increased plant-based protein

Education, healthcare, business and industry, and government operators accounted for growing pound shares of plant-based protein sales in 2025.

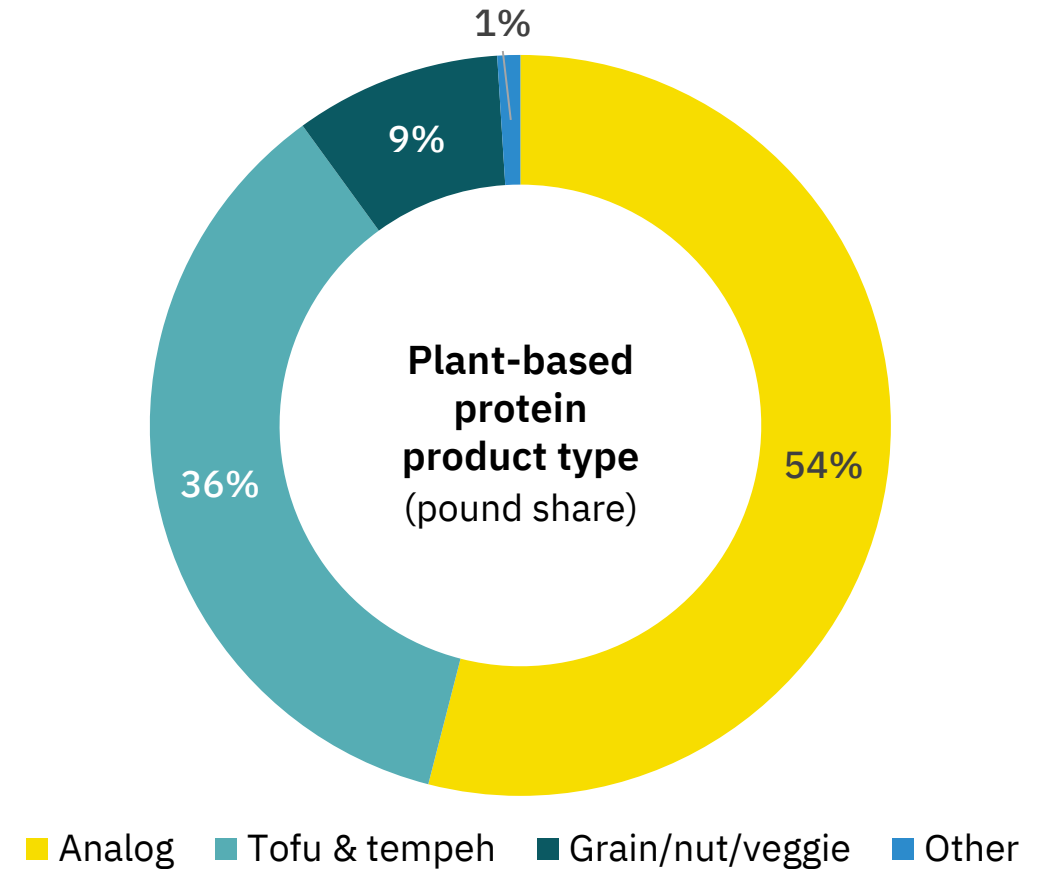
Analogs make up the largest share of plant-based protein pounds sold

Plant-based protein products are further broken down into:

- **Analog:** items that are meant to replicate the taste, texture, and appearance of animal-based meat
- Tofu & tempeh
- **Grain/nut/veggie:** items with plant-forward ingredients that are not meant to directly replicate animal-based meat (e.g., bean burgers)

Analog products accounted for more than half of plant-based protein sales in foodservice in 2025.

Analog product dominance reflects demand for products that can act as a direct substitute for animal meat. However, analogs have seen pound sales declines over the last three years, likely impacted at least in part by persistently high price gaps to conventional meat and to other plant-based formats.



Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales. Product Class: Plant-based proteins - Substitution Type (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh). Pound sales are 12 months ending December 2025. Note: Product substitution classifications (analog, tofu and tempeh, grain/nut/veggie) are occasionally re-evaluated by Circana and adjusted to reflect how products are being marketed by distributors. Therefore, the current product substitution sales breakdown should not be compared with previously published reports.

Grain/nut/veggie pound sales grew in 2025



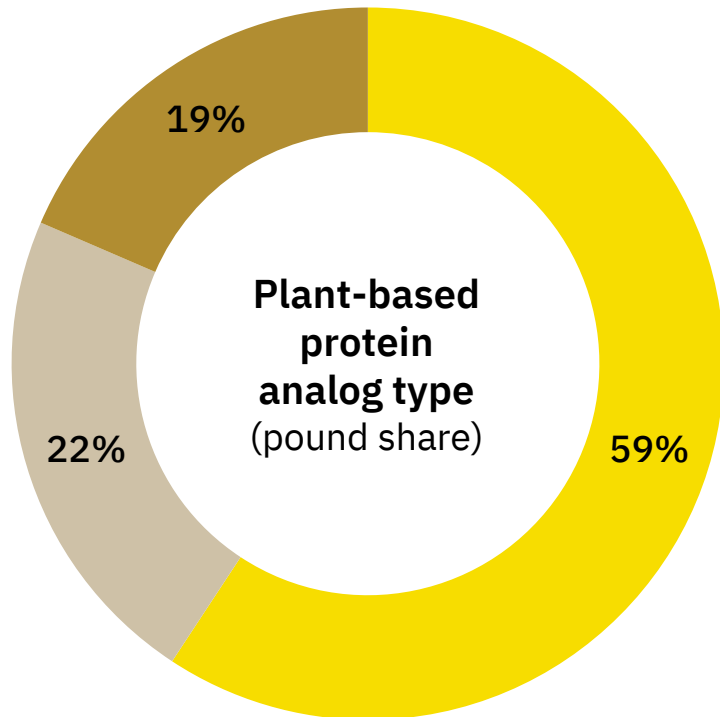
Growth in pound sales of grain/nut/veggie products was likely driven at least in part by lower average price points than analog products and a meaningful price per pound decrease in 2025. With increasing operational costs and consumer price sensitivity, operators may be more conscious of food costs and seek lower-priced options. Due to lower price points, dollar sales of grain/nut/veggie products were flat in 2025.

Broadline distributor plant-based product type pound and price change

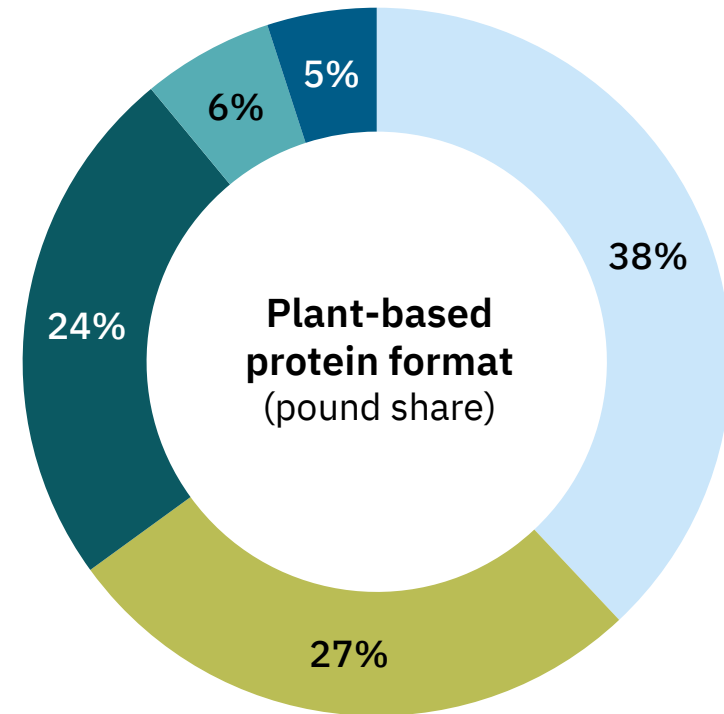
	Pound sales 2025	Pound growth 2024-2025	Average price / pound 2025	Price / pound change 2024-2025
Analog	31 MM	-11%	\$6.60	+1%
Tofu & tempeh	21 MM	0%	\$2.35	0%
Grain/Nut/Veggie	5.1 MM	+6%	\$5.85	-6%

The plant-based proteins category is dominated by select types and formats

About 60 percent of analog plant-based protein pound sales (and one-third of all plant-based protein pound sales) are beef substitutes. Patties are the most common plant-based protein format, with beef patties alone accounting for almost a quarter of plant-based protein pound sales.



■ Beef ■ Chicken ■ Pork



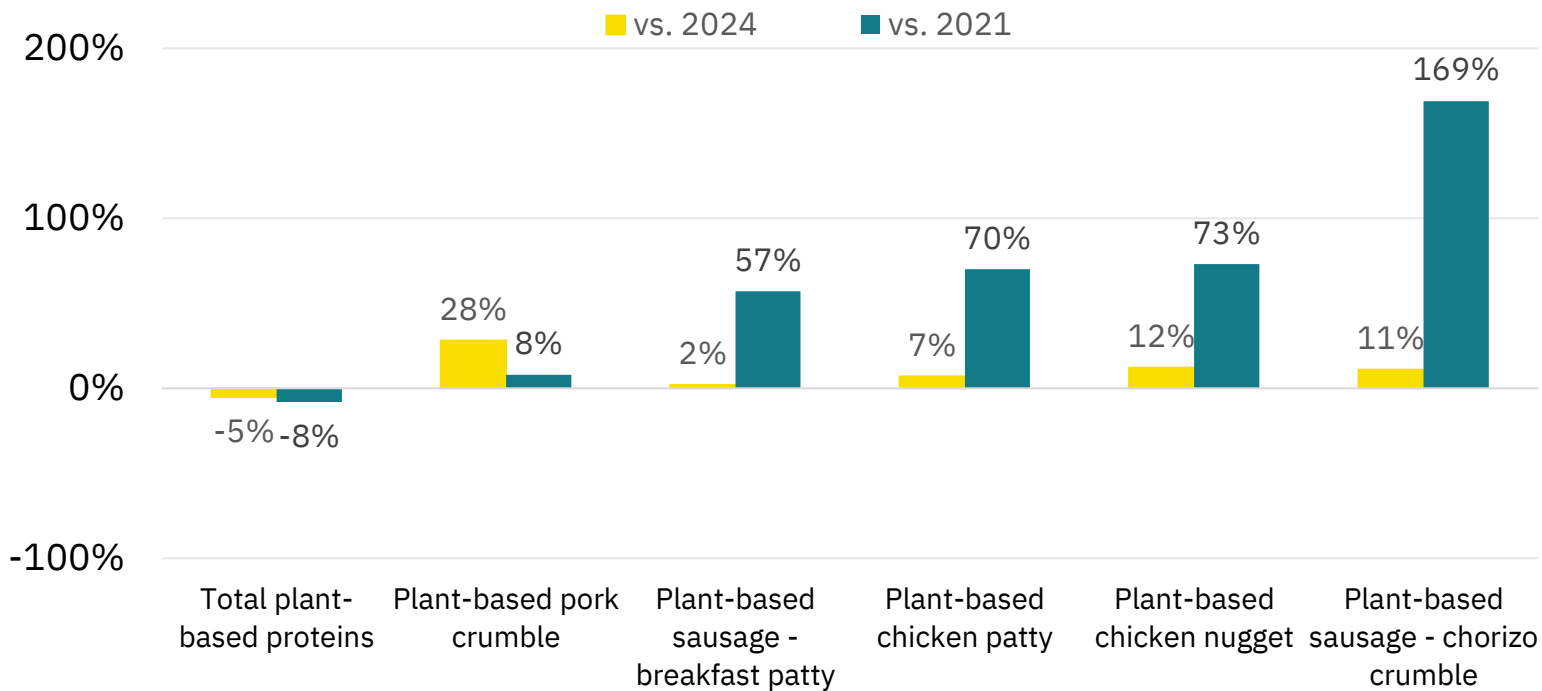
■ Patty ■ Block ■ Other ■ Ground ■ Nugget / Tender

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales. Product Class: Plant-based proteins - Substitution Type (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh). Pound sales are 12 months ending December 2025.

Pork analogs and other select plant-based protein formats grew

While beef analogs remain the largest plant-based protein sub-category, they declined in sales in 2025, and pork analogs grew. Diverse pork analog formats fueled that growth including breakfast patties and chorizo crumbles. Other formats like chicken nuggets and chicken patties also grew.

Emerging plant-based protein formats: broadline distributor pound growth



-16%

Beef analogs

-6%

Chicken analogs

+3%

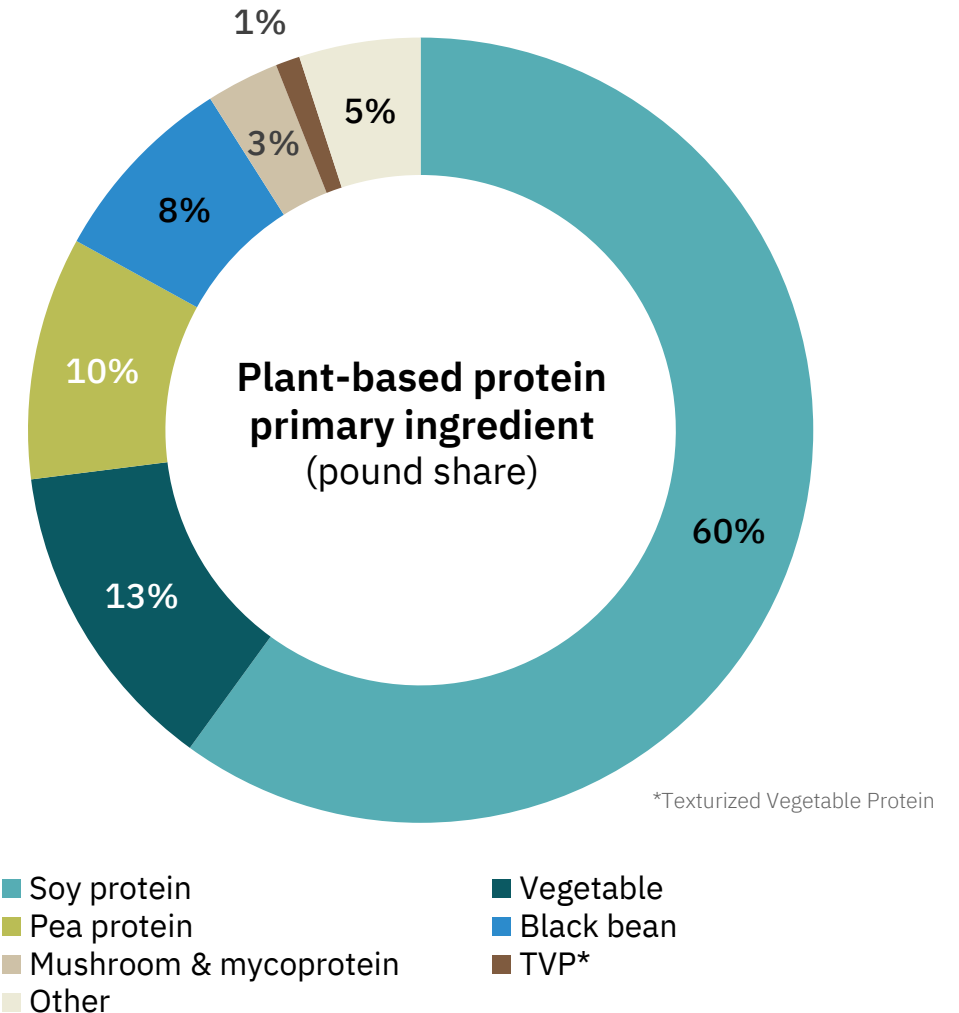
Pork analogs

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales. Plant-based proteins – Sub type and Format. Pound sales are 12 months ending December 2025 vs 4 prior years.

Soy protein is the most common primary ingredient in plant-based protein products

Soy protein remained the top primary ingredient in plant-based products, accounting for about 60 percent of plant-based protein pound sales in 2025. Vegetable, pea protein, and black bean-based products represented almost a third of pound sales, unchanged from 2024. Ingredients from grains like quinoa, other beans like chickpeas, and nuts make up a small portion of sales.

While ingredient diversity has evolved over the last decade, opportunities remain to further broaden options to improve taste, price, health benefits, and functionality across meal occasions.

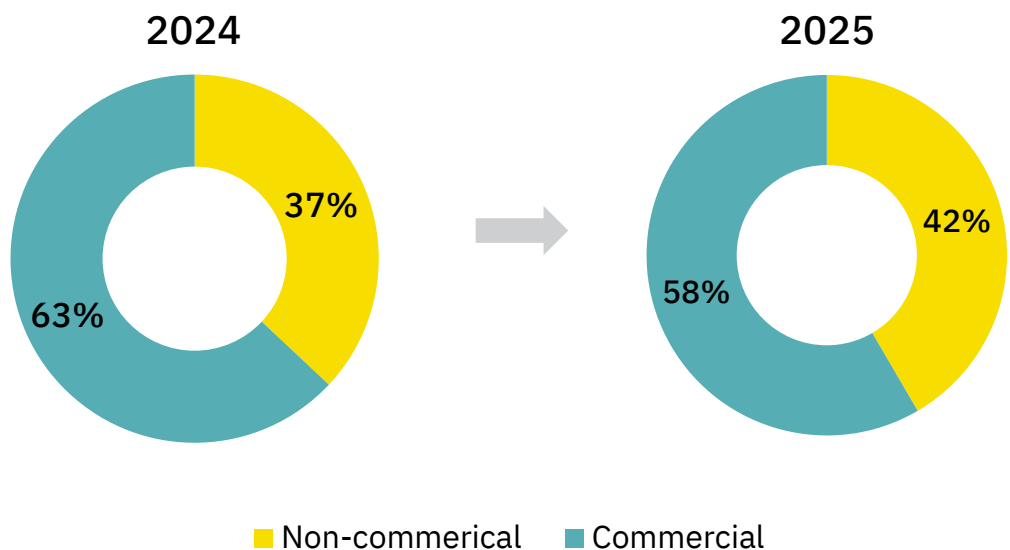


Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales. Plant-based proteins - Format and Primary Ingredients. Pound sales are 12 months ending December 2025 vs 4 prior years. Other ingredients include seitan/vital wheat gluten, vegetable/bean, quinoa, chickpea/garbanzo bean, walnut, beet & kale, eggplant, jackfruit, and not specified.

Commercial operators account for the largest share of plant-based protein distributor sales

Commercial operators made up 58 percent of total plant-based protein pound sales from broadline distributors in 2025. Among commercial operators, chain restaurants represented over 80 percent of pound sales. While independent and large chains accounted for the highest shares of plant-based pound sales among chain restaurants, micro/small and medium chains purchased more than their fair share.

Plant-based protein share of pound sales by operator type



Commercial chain purchase dynamics

	Share of plant-based protein pound sales	Share of operators purchasing plant-based proteins	Purchase index*
Independent chains (1-2 units)	29%	44%	65
Micro chains (3-19 locations)	18%	12%	154
Small chains (20-99 units)	14%	8%	190
Medium chains (100-249 units)	6%	4%	138
Large chains (250+ units)	33%	32%	101

Note: Chains account for **84%** of commercial plant-based protein pound sales

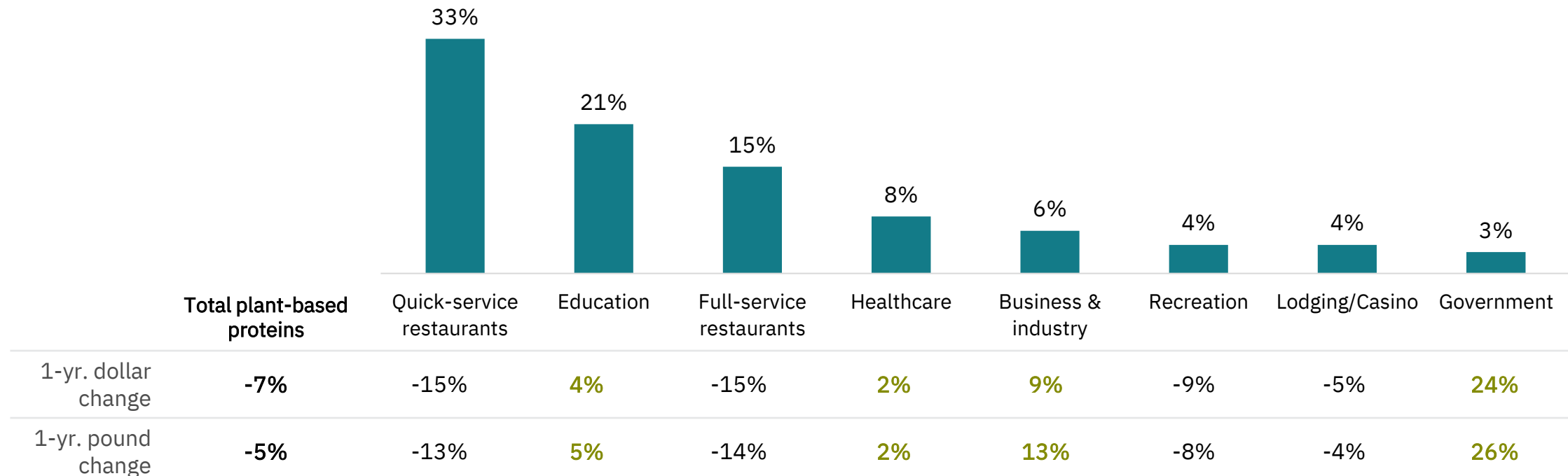
Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Plant-based proteins. Dollar and pound sales are 12 months ending December 2025 vs 4 prior years.

*Purchase index calculated by: Share of plant-based protein pound sales / share of operators purchasing plant-based proteins

QSR maintains the largest share of plant-based protein sales while non-commercial outlets grew

Quick-service and full-service restaurants saw decreasing plant-based protein pound sales in 2025. However, several non-commercial outlets, including education, healthcare, business and industry, and government, saw increased sales and share. Purchasing by educational institutions has grown significantly in recent years, expanding from a 13 percent share of plant-based protein sales in 2021 to 21 percent in 2025.

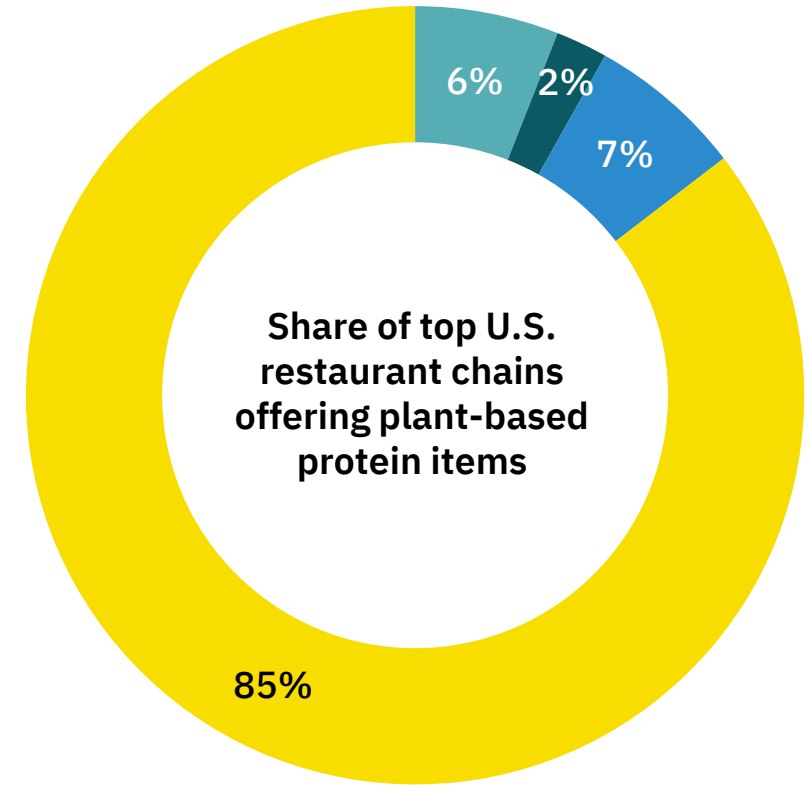
Operator segment share of total plant-based protein pound sales 2025



While restaurants account for a large share of plant-based protein sales, menu availability is still low

Just eight percent of the top 250 restaurant chains appeared to offer dishes with plant-based protein analogs on their menus in 2025, according to GFI analysis, while an additional seven percent of chains offered only dishes with other plant-based proteins (e.g., grain/nut/veggie, tofu).

These chains represent 28 percent of locations, although not all chains offer the plant-based protein item(s) at all locations.



- Have plant-based meat (analog) dishes
- Have plant-based meat and plant-forward dishes
- Have only plant-forward (grain/nut/veggie, tofu, etc.) dishes
- Don't have plant-based protein dishes

Plant-based diner insights

Plant-based meat analog diners are valuable, eating at restaurant chains more often and spending more on trips that include plant-based options

#1

Plant-based meat buyers are important foodservice guests

Plant-based meat buyers visited restaurant chains more often and spent more annually than the average diner in 2025, making them valuable customers to attract and retain.

#2

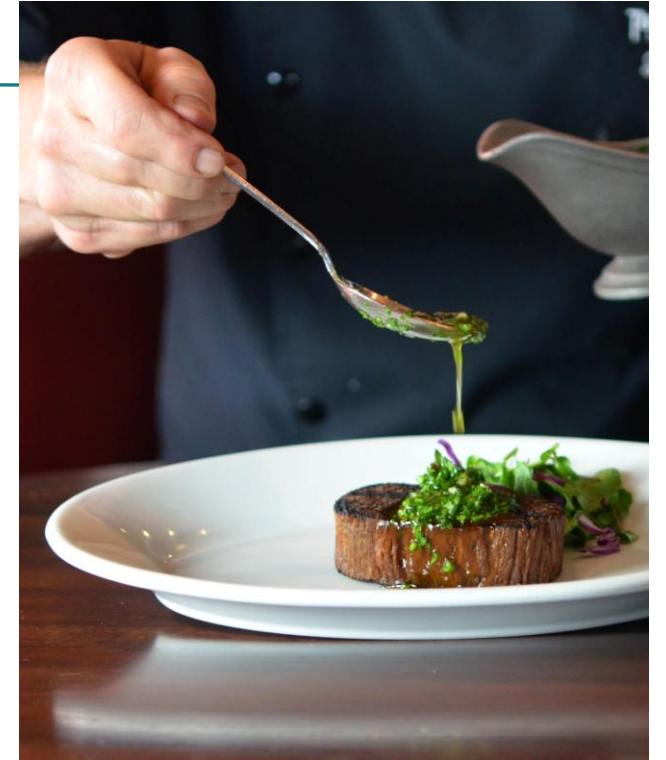
Plant-based meat items increase guest checks

Plant-based meat buyers (i.e., those who have ordered a plant-based meat item in the past year) spent over \$2 more per check when purchasing a plant-based meat item.

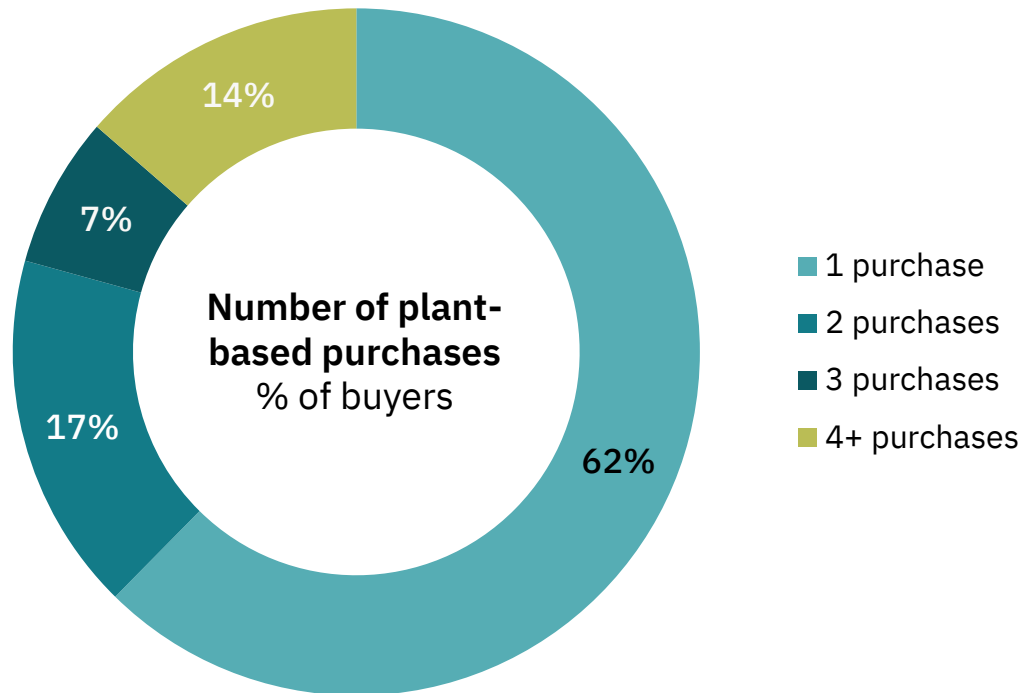
#3

Plant-based meat orders are more often online

Plant-based meat dishes are more likely to be ordered online, suggesting opportunity to capture more plant-based diner spend by featuring plant-based meat dishes in online ordering platforms.



7% of diners purchased plant-based meat in 2025



Almost two-thirds of plant-based meat diners purchased plant-based meat analog dishes only once in 2025, indicating opportunity to grow frequency among consumers already interested in plant-based dishes.

7.3%

U.S. adults 18+ purchased a plant-based meat item at a restaurant chain in 2025

2.6

average number of times buyers purchased plant-based meat items at restaurant chains in 2025

Plant-based meat buyers = restaurant chain customers who purchased a plant-based meat item at least once in the past year. Restaurant chains typically 50+ locations, does not include independent restaurants or non-commercial foodservice.

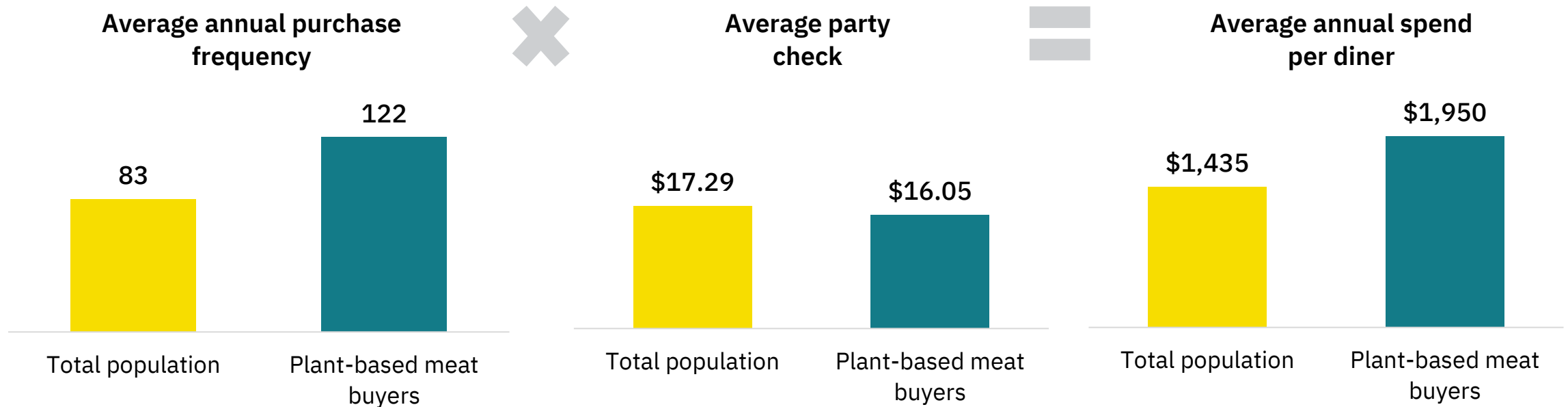
Plant-based meat item = dish with plant-based meat analog product, other ingredients may not be plant-based

Source: Circana, Checkout 12ME Dec 2025

Plant-based buyers are valuable restaurant chain customers

Plant-based meat buyers make almost 50 percent more restaurant chain purchases annually compared to the total population and spend almost \$2,000, \$500 higher than the total population. Though their average check is lower, at least partially due to having an above average share of visits to lower-priced QSR chains, their trip frequency and annual spend is higher.

Total restaurant chain purchases (including plant-based meat and other purchases)



Plant-based meat buyers = restaurant chain customers who purchased a plant-based meat item at least once in the past year. Restaurant chains typically 50+ locations, does not include independent restaurants or non-commercial foodservice.

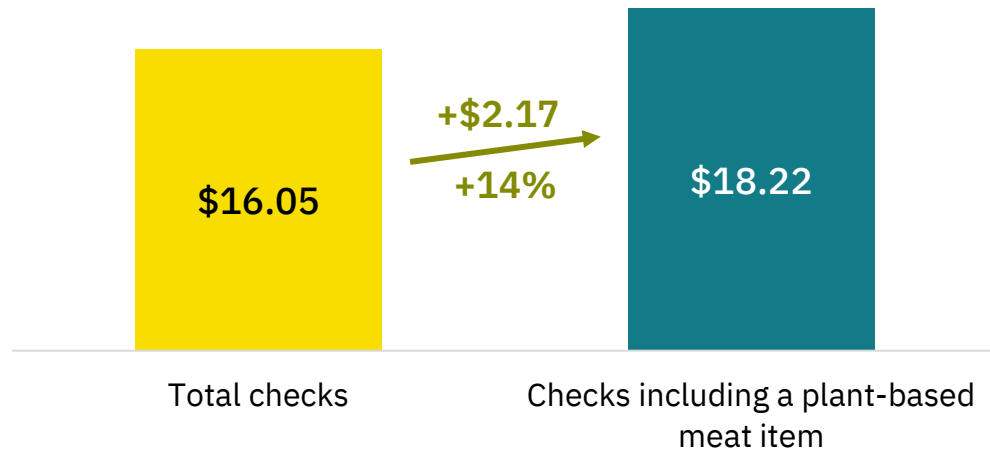
Plant-based meat item = dish with plant-based meat analog product, other ingredients may not be plant-based

Source: Circana, Checkout 12ME Dec 2025

Checks are higher when they include plant-based meat items

Offering plant-based meat menu items not only attracts frequent diners but can increase their total check size.

Average party check (among plant-based meat buyers)



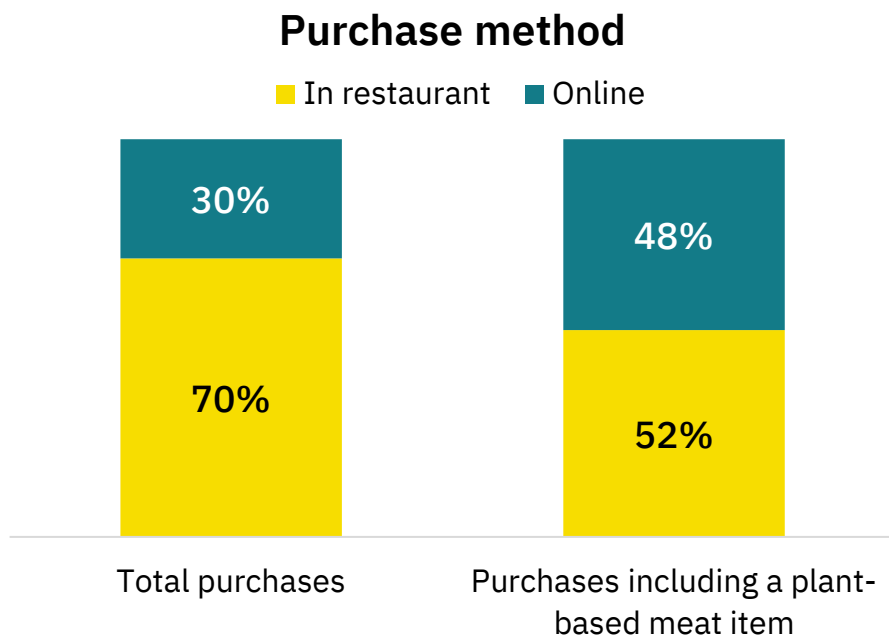
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Source: Circana, Checkout 12ME Dec 2025





Plant-based meat dishes are more likely to be ordered online

Highlighting plant-based dishes on online ordering platforms could help reach consumers interested in these options.



Plant-based meat buyers = restaurant chain customers who purchased a plant-based meat item at least once in the past year. Restaurant chains typically 50+ locations, does not include independent restaurants or non-commercial foodservice. Online purchases include both restaurant app/websites and third-party delivery services (e.g. DoorDash, UberEats)
Plant-based meat item = dish with plant-based meat analog product, other ingredients may not be plant-based
Source: Circana, Checkout 12ME Dec 2025

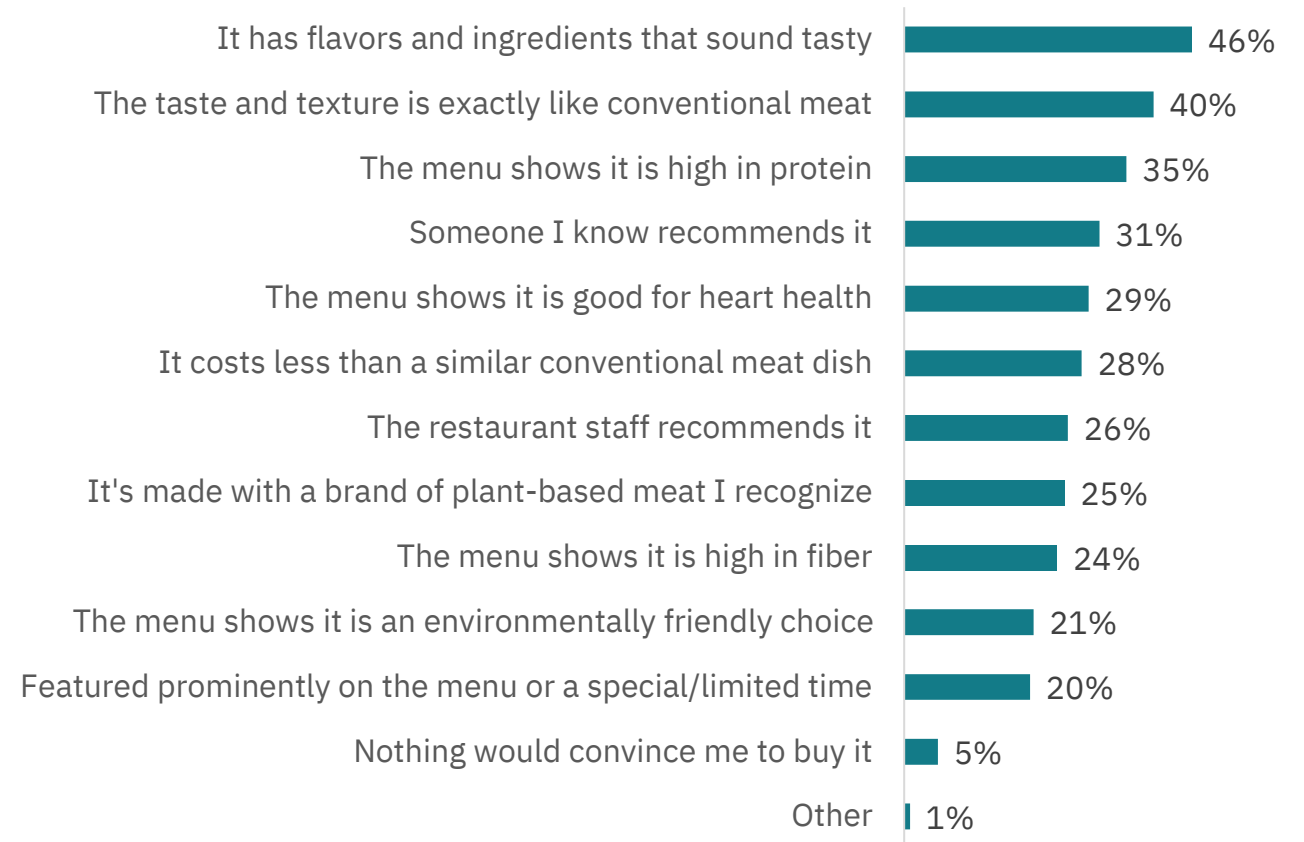


Taste, price, and availability are key levers to capture plant-based meat occasions

Consumer research shows that taste and price are key barriers to consumers choosing plant-based meat, and improving taste and price of plant-based meat dishes would motivate diners to choose them more often. Other tactics like highlighting health benefits or leveraging recommendations can further build consumer appeal.

Consumers also indicate that lack of availability is an issue—35 percent of consumers open to plant-based meat say a top reason they haven't ordered plant-based meat dishes recently is that the restaurants they visit don't have those options.

Convincing reasons to purchase plant-based meat dishes



Imagine you see a new plant-based meat dish the next time you are at a restaurant. Which of the following reasons, if any, would convince you to buy it? Please select all that apply.

Source: Poll by Morning Consult on behalf of GFI: n=3,512 U.S. non-plant-based meat or dairy rejecting adults, December 2025

Acknowledgements

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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.

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About the sales data

Foodservice sales:

GFI commissioned foodservice sales data from Circana, focusing on various plant-based and conventional categories. Circana collects point-of-sale data from selected broadline distributors for their SupplyTrack tracking service. This data reflects itemized sales from broadline distributors shipped to foodservice operators. The SupplyTrack service currently tracks 20 participating broadline distributors, data from 280+ categories, and collects 850K+ operator purchases monthly.

SupplyTrack covers about 48% of the total foodservice landscape (86% of all broadline distribution). Broadline distributor sales generally skew toward small/medium-sized chains and noncommercial operators and away from large chains; however, the data reaches both commercial and noncommercial operators across sizes and the following segment types:

- Commercial: QSR, FSR, Convenience Stores, Food Stores, and Other Retail.
- Noncommercial: Education, Government, Health Care, Business and Industry, Lodging/Casino, Recreation, and other noncommercial environments.

The SupplyTrack data obtained from Circana covers sales across the U.S. market for the five years 2021, 2022, 2023, and 2025, all 12 months ending in December.

Buyer analysis:

Circana's Checkout® tracks physical and digital foodservice receipts with over 9 million receipts captured annually. Checkout is a longitudinal receipt panel capturing paper and digital restaurant purchases, projected to the U.S. 18+ population and calibrated to industry benchmarks to track shifts in consumer behavior across chains and food/beverages.

- Plant based = item with a plant-based meat analogue (ie. Impossible, Beyond, unbranded plant-based chicken sandwich), other ingredients may or may not be vegan (e.g. Burger King Impossible Whopper with cheese is included in the plant-based definition)
- Total population / restaurant chain buyers, n=115,949; Plant based buyers, n=4,045 (purchased a plant-based item at least once in the past year)
- Restaurant chains (typically 50+locations) Doesn't include independent restaurants or non-commercial foodservice

Circana checkout data covers foodservice sales across the U.S. 12 months ending December 2025.