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

2020–2024

Contents

Foodservice is a key channel for plant-based foods

Foodservice is an important channel for plant-based brands and companies to reach consumers, and offering plant-based dishes allows foodservice operators to reach the many consumers 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 ingredients to life in delicious ways and remove hurdles to consumers preparing themselves.
- **Reach consumers on more occasions.** Distribution across retail and foodservice increases accessibility and enables consumers to choose plant-based more often.
- **Collect feedback easily.** Foodservice can be a strategic outlet to launch products and secure foodservice consumer and operator feedback.

Image courtesy of T.vyc/Shutterstock.com

Key findings

The state of foodservice in 2024

Consumer affinity for eating out continues to grow.

The total foodservice sector has seen steady growth since the downturn caused by the Covid-19 pandemic. In 2024, the share of consumer spend on food away from home reached a new high, surpassing pre-pandemic levels and increasing the gap to spend on food at home.

Circana data on total food operator purchases from broadline distributors showed growth in dollar and pound sales in 2024. The conventional meat and milk categories also grew in foodservice.

The sector still faces challenges, particularly around inflation.

Recent years have seen a host of challenges for the foodservice sector including supply chain disruptions and inflation. According to Circana, the average food price-per-pound from distributors to operators increased 30% between 2020 and 2024.

While 2024 saw wholesale food prices and inflation ease, consumers continue to express concern and frustration about food costs that are impacting their food buying behaviors.

+4%

2024 growth in foodservice dollar sales from operators to broadline distributors

+2%

2024 growth in foodservice pound sales from operators to broadline distributors

Circana

Key findings

Plant-based dairy and eggs in foodservice

Plant-based milk and creamer experienced continued growth.

Plant-based milk dollar sales were up 9% and pound sales up 6% in foodservice in 2024, according to Circana. Conventional milk sales also grew, so plant-based milk continued to hold a 12%-pound share of the total milk category in broadline distributor sales.

Plant-based creamer also grew and reached an impressive 31% of total creamer pound sales.

Plant-based milk and creamer are expected to enjoy additional tailwinds in 2025 as top coffee chains remove plant-based dairy surcharges.

Plant-based eggs have grown significantly in recent years.

While plant-based eggs represent a small category in foodservice with 1% share of the total egg market, the category grew 28% in dollar and 30% in pound sales in 2024 alone and may be poised to capture additional share as egg prices rise and supply chains become volatile due to the avian flu.

Plant-based cheese saw losses.

Plant-based cheese declined in 2024, losing 12% in pound and dollar sales. Closing gaps on taste and texture will be critical to plant-based cheese gaining share in the massive foodservice cheese market, which is seven times the size of milk.

Key findings

Plant-based proteins in foodservice

Image courtesy of DronG/Shutterstock.com

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 down 5% and pound sales down 4% in 2024, according to Circana.

Notable bright spots were the plant-based pork category and specific formats, including plant-based pork patties, chicken tenders, and chorizo sausage, which all grew. Tofu and tempeh also saw sales gains.

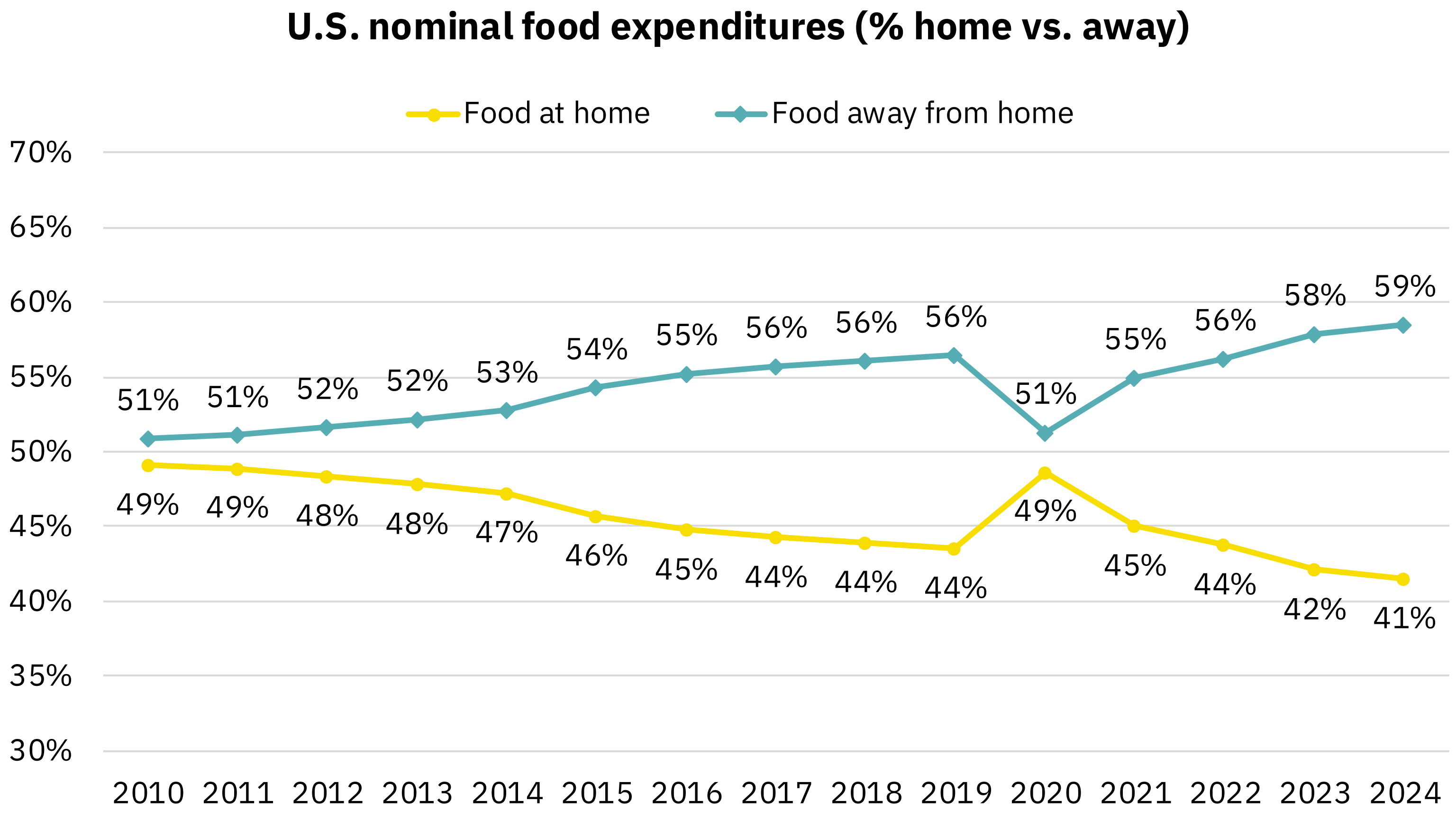
While restaurants remain the largest purchaser of plant-based proteins, sales to healthcare, business and industry, and government operators expanded.

Price and taste continue to be key barriers to consumers choosing plant-based options.

Consumer research consistently finds that improvements to taste and texture as well as price are critical to driving plant-based adoption, overall and in foodservice. In addition to product innovation to improve taste, leveraging familiar flavors and formats in plant-based dishes, supporting trial (e.g., via samples) and engaging with chefs to ensure an elevated taste experience are key levers to overcome consumer taste concerns in foodservice environments and drive trial and repeat of plant-based dishes.

Foodservice market landscape

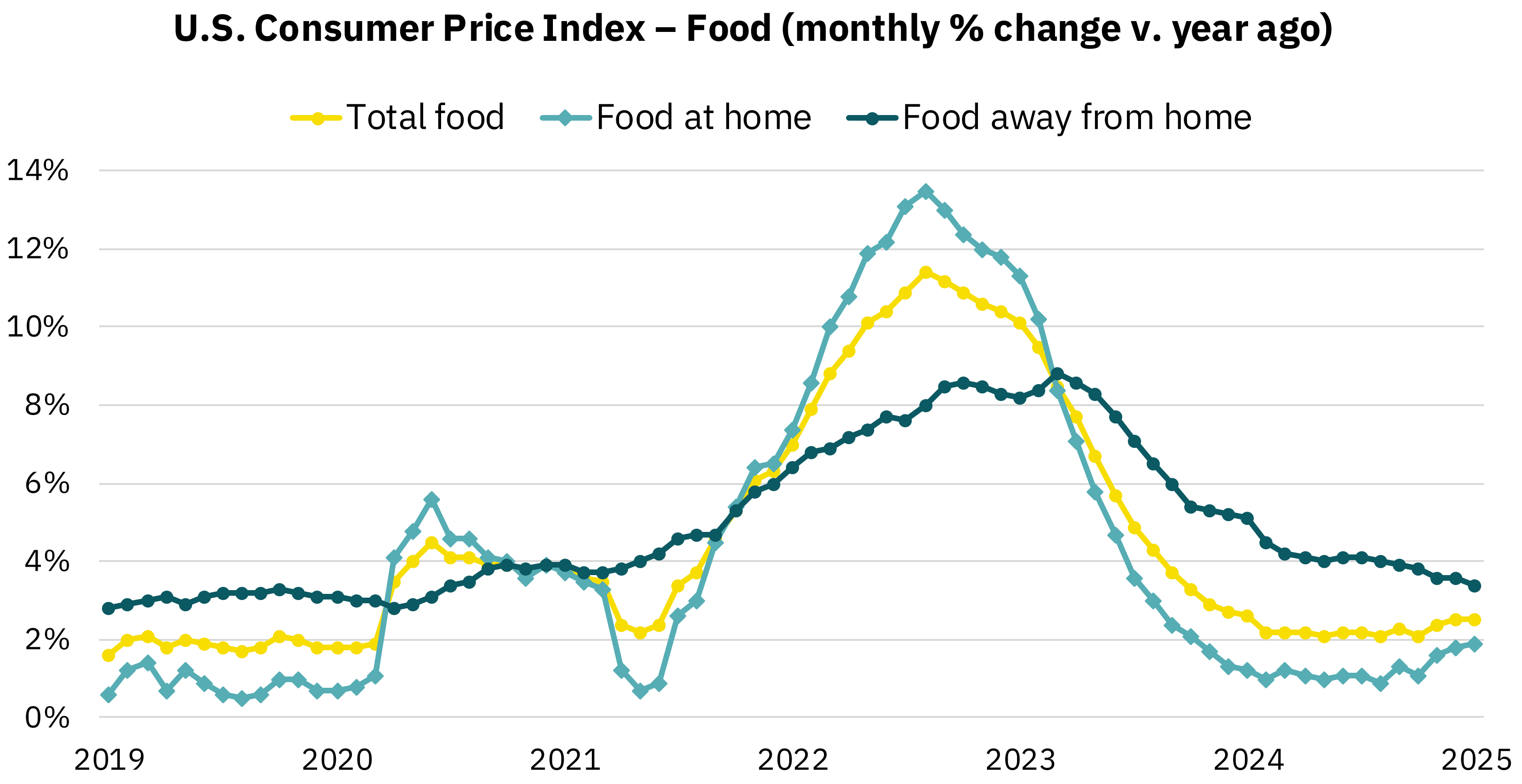
Spending on food away from home has rebounded post-pandemic



Following a sharp decline during the Covid-19 pandemic, consumer spending in foodservice has rebounded strongly over the past four years. Consumer expenditures on food away from home surpassed pre-pandemic levels and reached a new high in 2024.

Source: USDA Food Expenditures Series - nominal food and alcohol expenditures, with taxes and tips, for all purchasers

Dining out price increases continue to outpace retail price increases



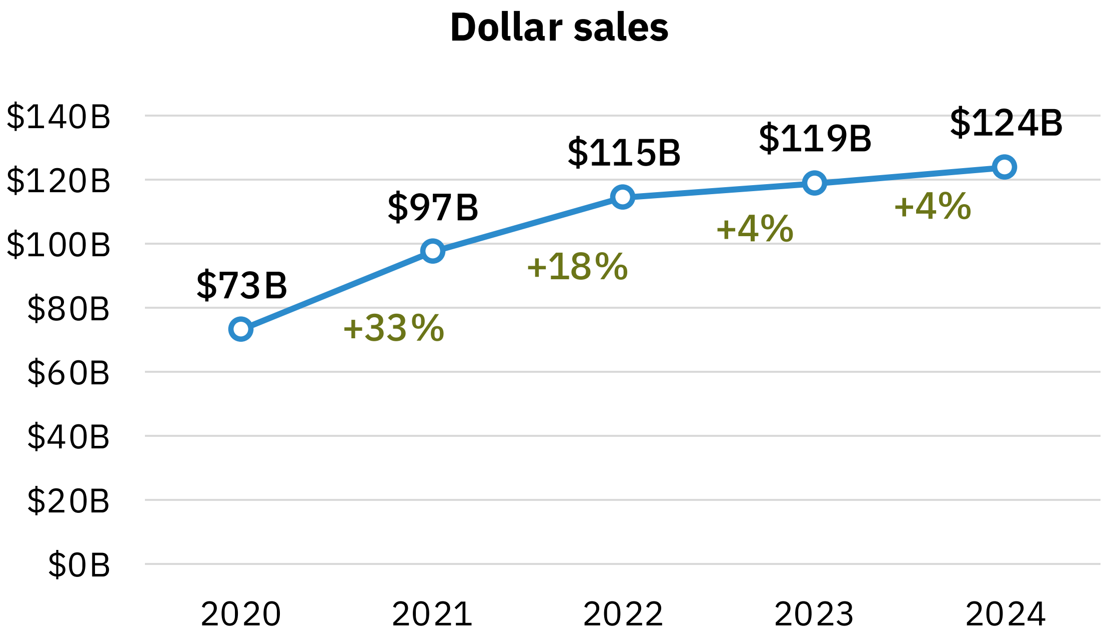
Economic struggles and labor increases from farmers to grocers, among other factors, have led to price increases across all food channels.

Though food away from home continues to experience higher price increases than preparing food at home, the gap is shrinking. Return to work, experiential dining, delivery apps, and increased labor costs are some factors driving disproportionate increases in away-from-home food expenses.

Source: U.S. Bureau of Labor Statistics, 12-month percentage change, Consumer Price Index, January 2019– Dec 2024.
https://www.bls.gov/charts/consumer-price-index/consumer-price-index-by-category-line-chart.htm

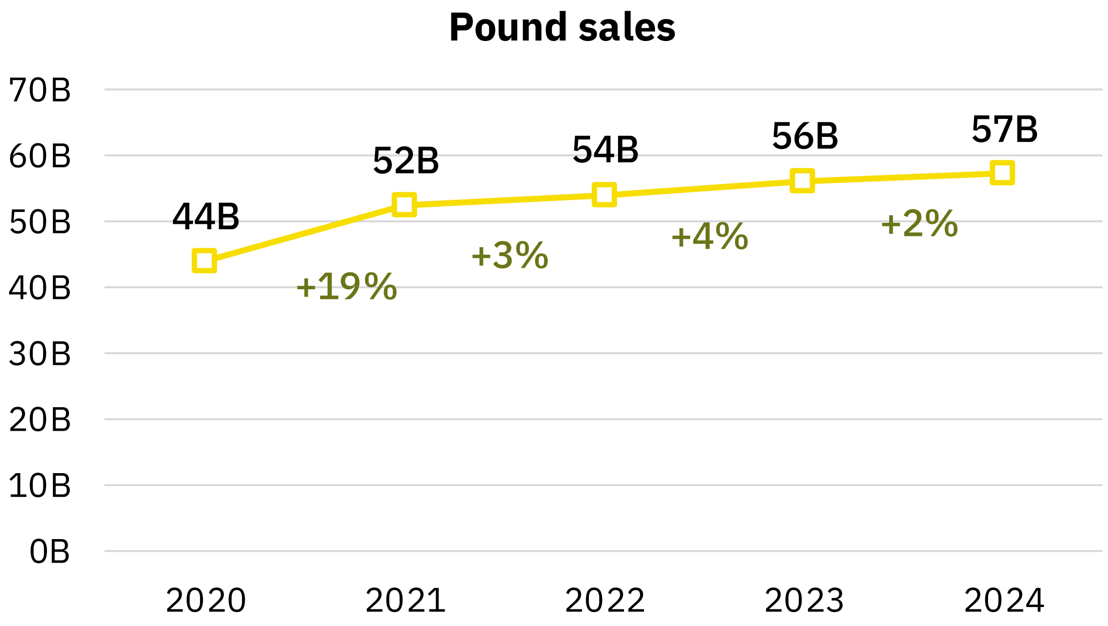
Foodservice dollar and pound sales grew in 2024

Circana data on total food operator purchases from broadline distributors shows that dollar sales increased by 4% while pound sales increased by 2% in 2024. 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 30% between 2020 and 2024.



+70% 4-year growth

+14% 4-year CAGR

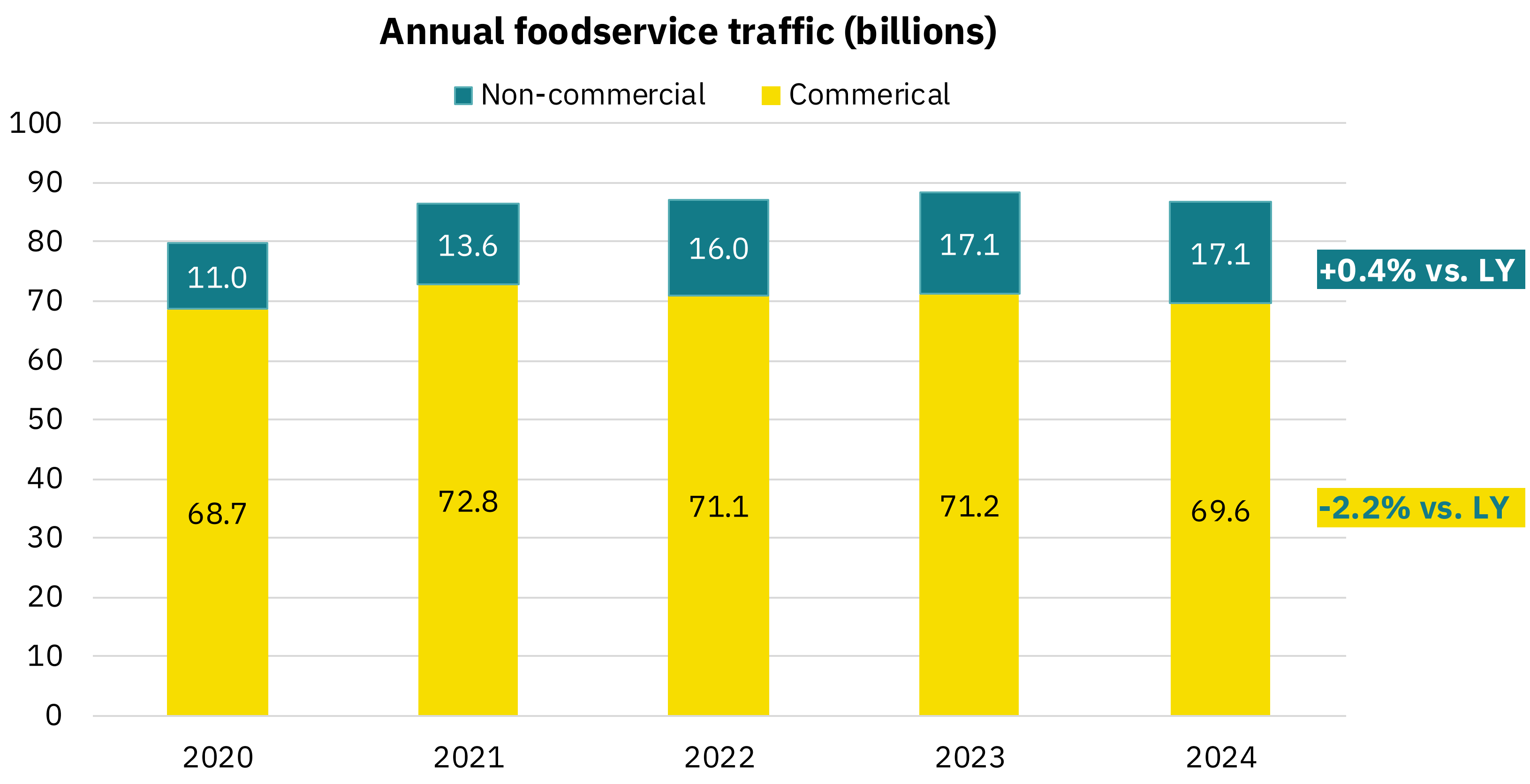


+30% 4-year growth

+7% 4-year CAGR

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Total food. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years. *CAGR = compound annual growth rate*

Non-commercial foodservice outlets experienced small traffic growth, outpacing commercial foodservice



Visits to non-commercial foodservice outlets (including education, government, healthcare, business and industry, recreation, etc.) increased +0.4% versus 2023. Commercial foodservice (including quick and full-service restaurants, convenience stores, etc.) had fewer visits in 2024. While foodservice spend is rebounding, consumers are still careful about where they spend on food.

Source: Circana Foodservice Market Sizing report, Circana CREST US. Traffic is 12 months ending December 2020-2024.

Plant-based category performance

Key findings

PLANT-BASED PROTEINS UP OVER 4 YEARS

01

Plant-based protein sales are up since 2020, similar to conventional meat. Plant-based sales declined slightly in 2024, with dollar sales down 5%.

PLANT-BASED MILK CONTINUES TO GROW

02

Plant-based milk grew 9% in dollar sales and creamer grew 5% in 2024. Plant-based creamer reached a 31% share of the total creamer market.

PLANT-BASED EGGS GAINING TRACTION

03

The plant-based egg category is small but growing quickly, with dollar sales up 28% in 2024. Dollar sales have grown at a 58% compound annual growth rate (CAGR) since 2020.

PLANT-BASED PRICE PREMIUMS REMAIN HIGH

04

Plant-based meat analogs and milk are priced, on average, 70% higher than conventional counterparts — in terms of distributor prices — and those gaps have persisted in recent years.

Foodservice sales performance varied across categories in 2024

Plant-based milk and creamer continued to show strong growth in dollar and pound sales along with the nascent category of plant-based eggs. Plant-based proteins are the largest plant-based category in terms of dollar sales in foodservice but experienced sales declines in 2024.

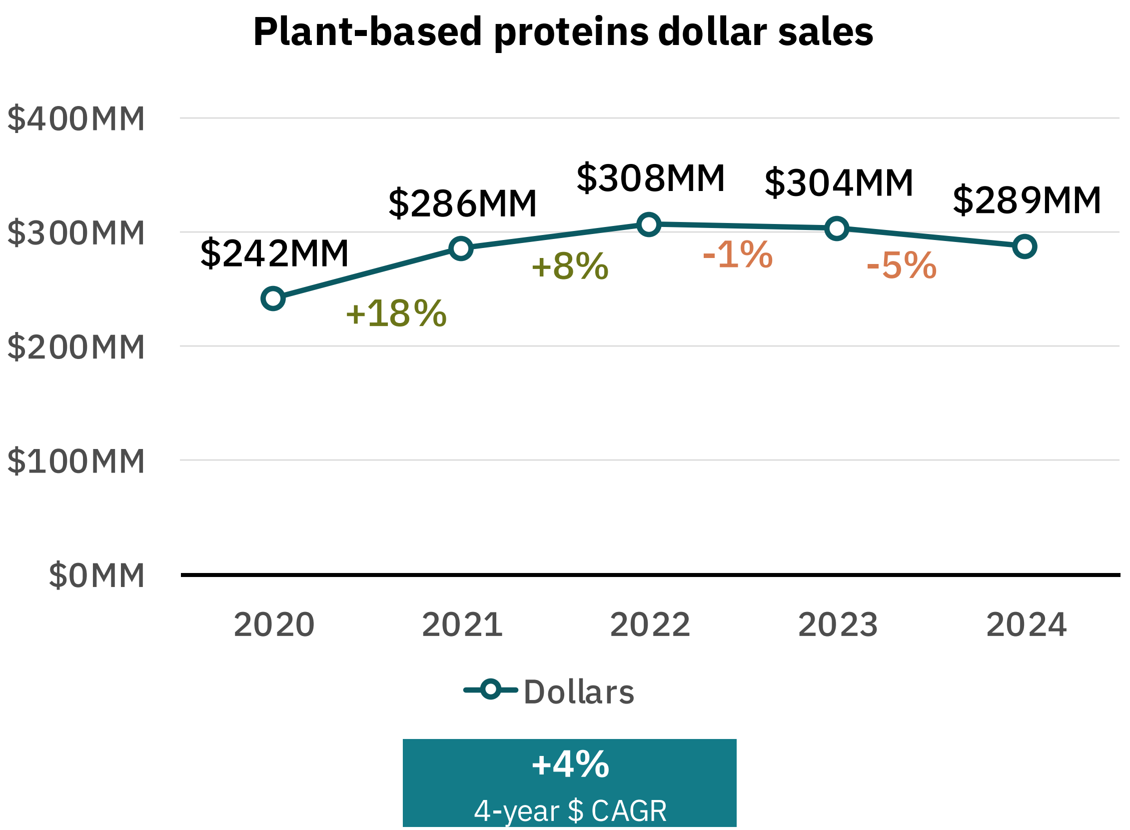
Broadline distributor foodservice sales by plant-based category in 2024

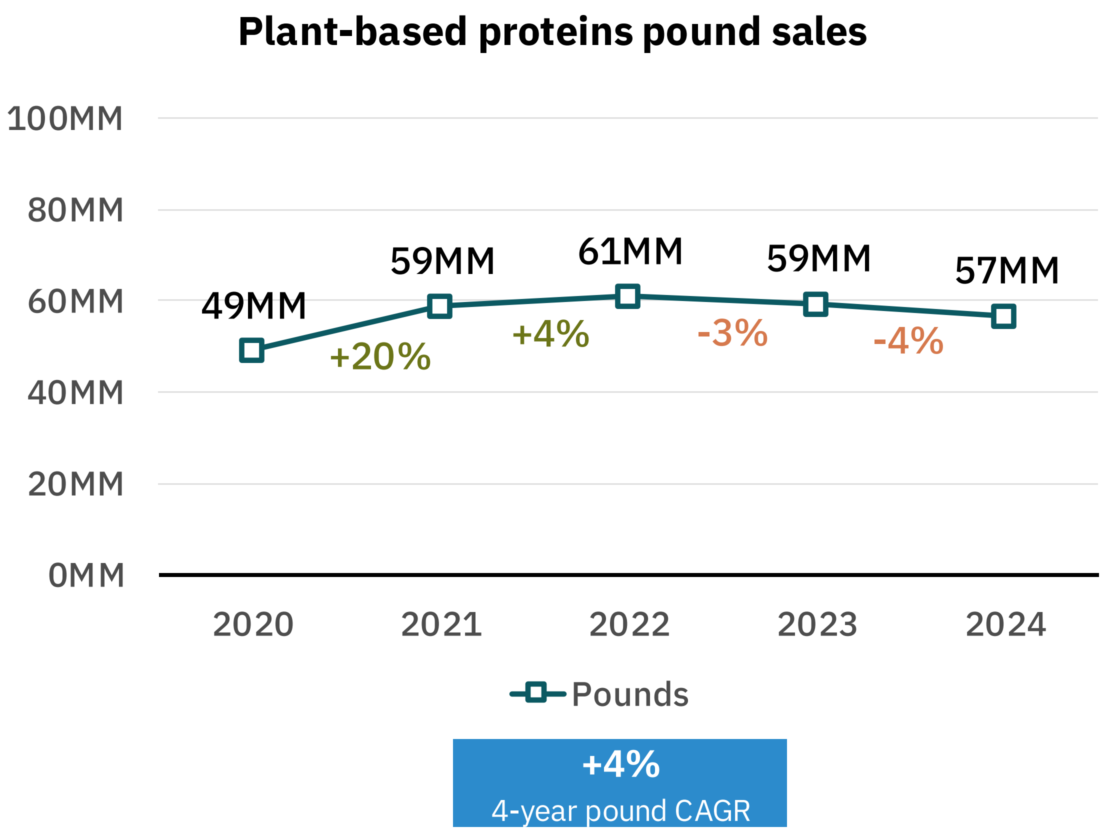
	2024 dollar sales	Change vs. 2023	2024 pound sales	Change vs. 2023
Plant-based proteins	$289 MM	-5%	57 MM	-4%
Plant-based milk	$240 MM	+9%	167 MM	+6%
Plant-based creamer	$179 MM	+5%	65 MM	+4%
Plant-based cheese	$28 MM	-12%	7.2 MM	-12%
Plant-based eggs	$7.3 MM	+28%	1.4 MM	+30%

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales. Product class: Plant-based proteins (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh), Milk alternatives, Creamer alternatives Cheese alternatives, Egg alternatives. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

Plant-based protein sales are down slightly in the past two years

Plant-based proteins sales are up from lows in 2020 that coincided with a drop in overall foodservice sales due to the Covid-19 pandemic. However, sales declined in 2024 with dollar sales down 5% and pound sales 4%.

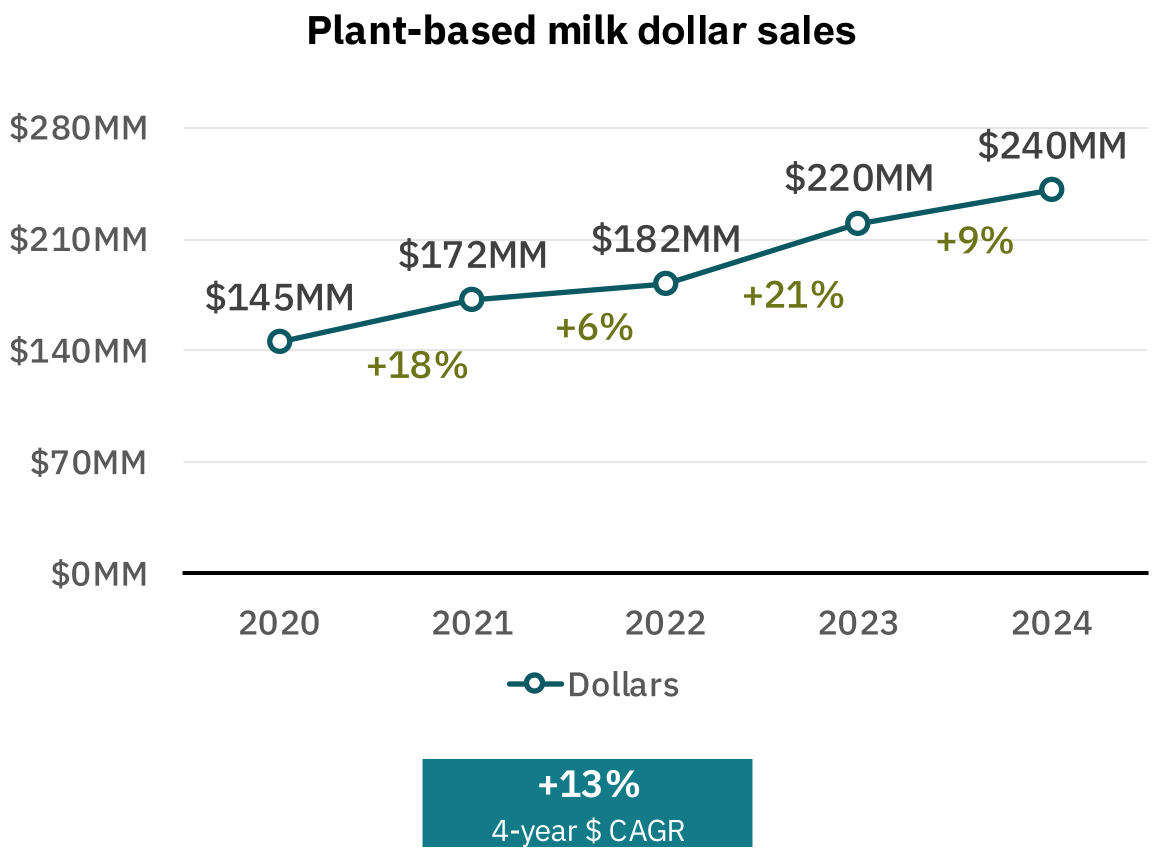


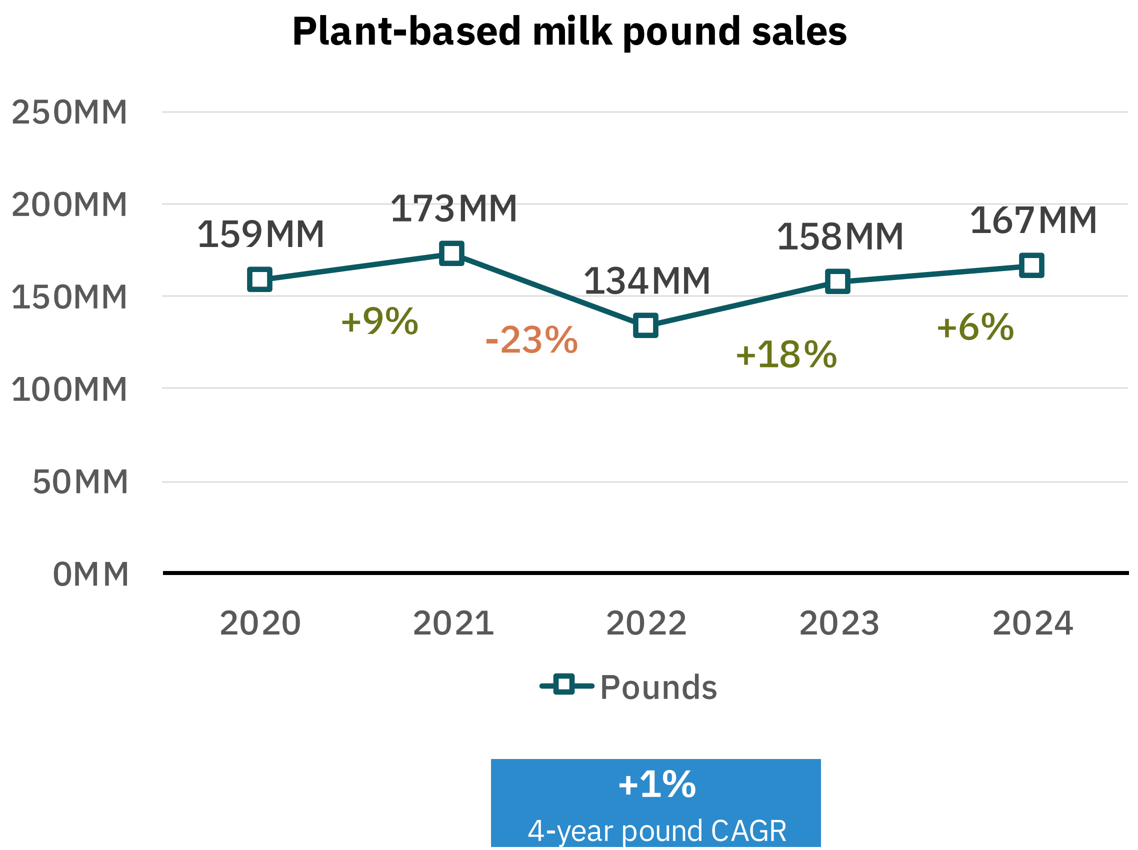


Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales: Plant-based proteins (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh). Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

Plant-based milk continues to show strong growth

In 2024, plant-based milk dollar sales were up 9%, continuing several years of strong growth, while pound sales were up 6%. Oat milk accounts for 38% of foodservice plant-based milk dollar sales, the largest contributor.

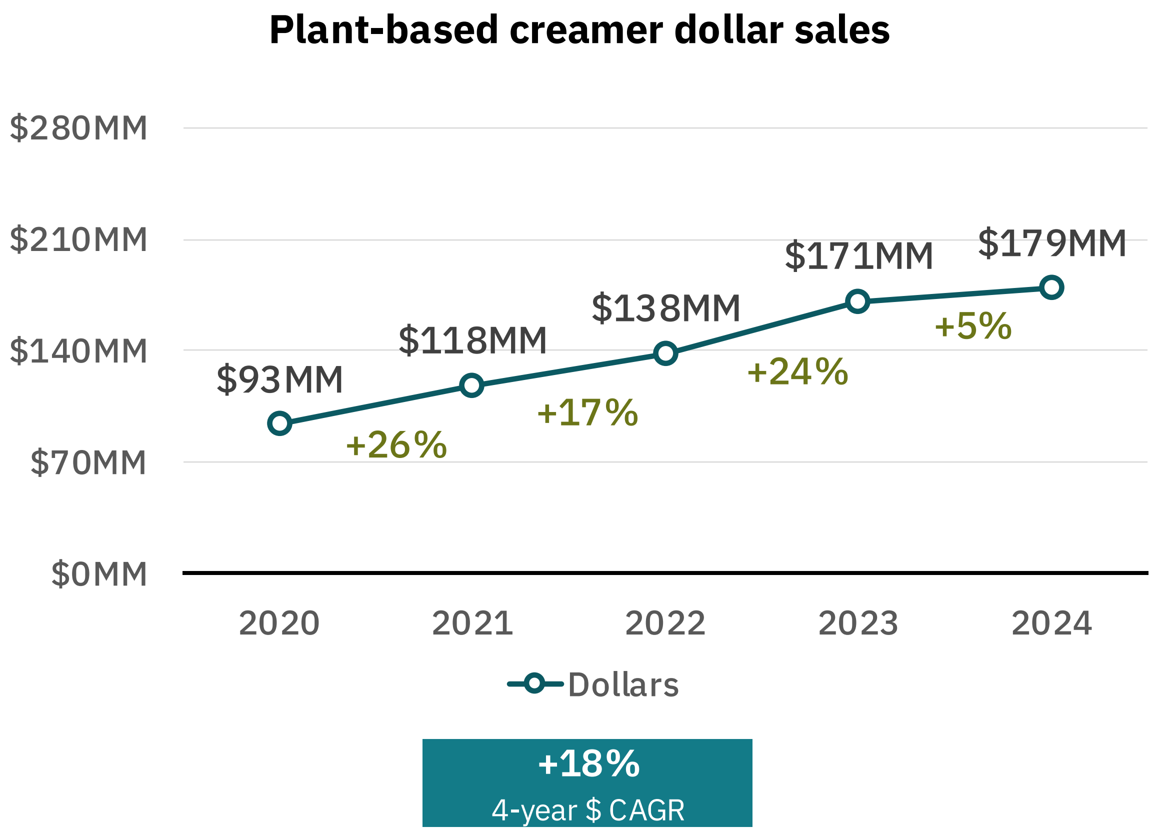


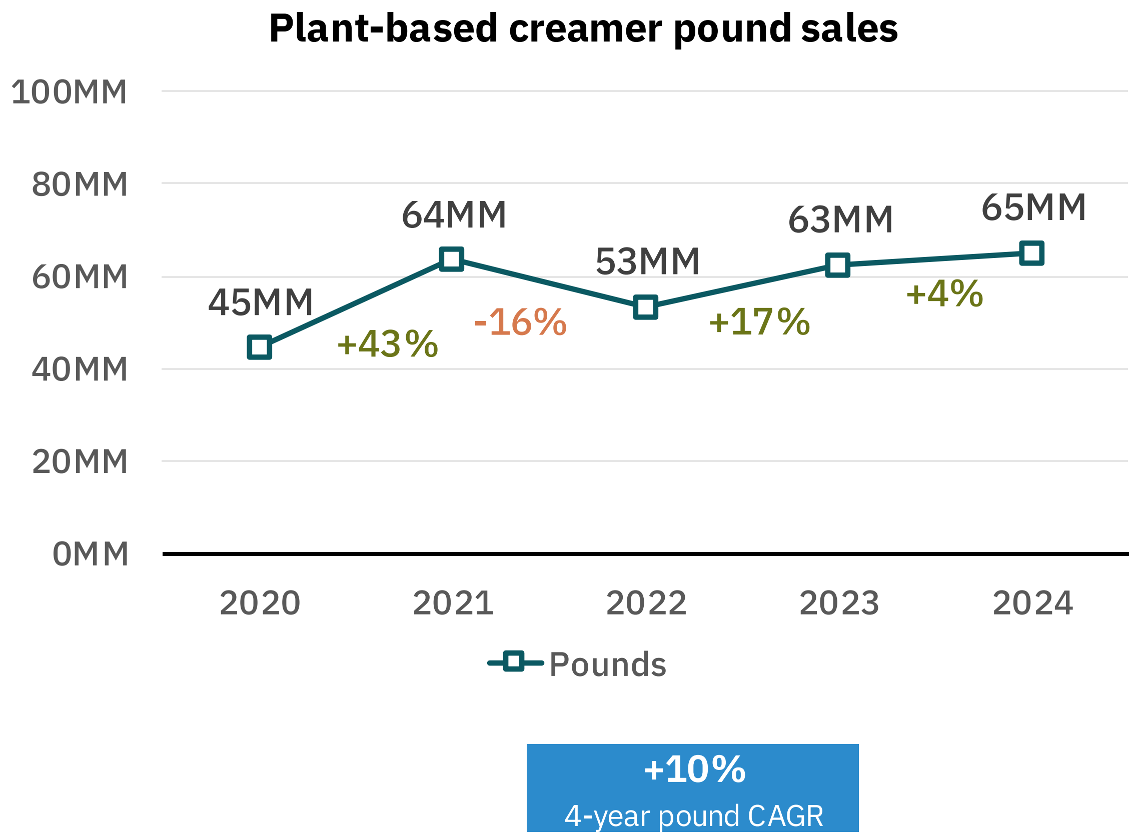


Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product class: Milk alternatives. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

Plant-based creamer has grown significantly in recent years

Plant-based creamer dollar and pound sales have increased even more significantly than plant-based milk over the last four years. In 2024, plant-based creamer dollar sales were up 5% and pound sales up 4%.

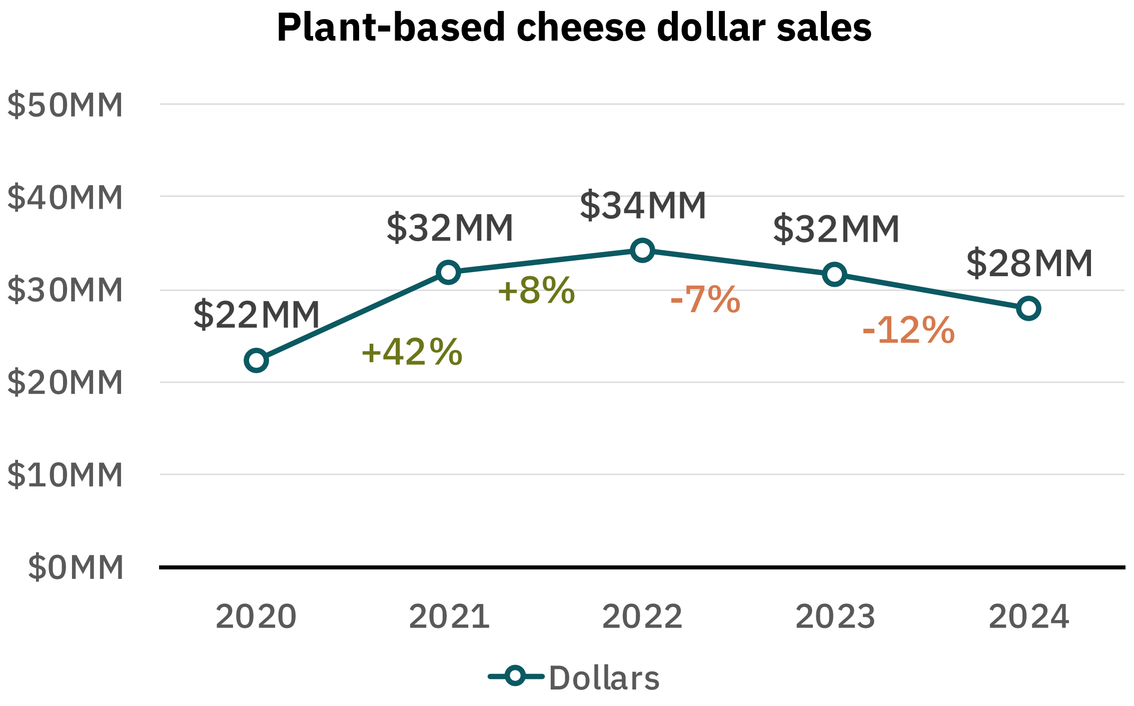




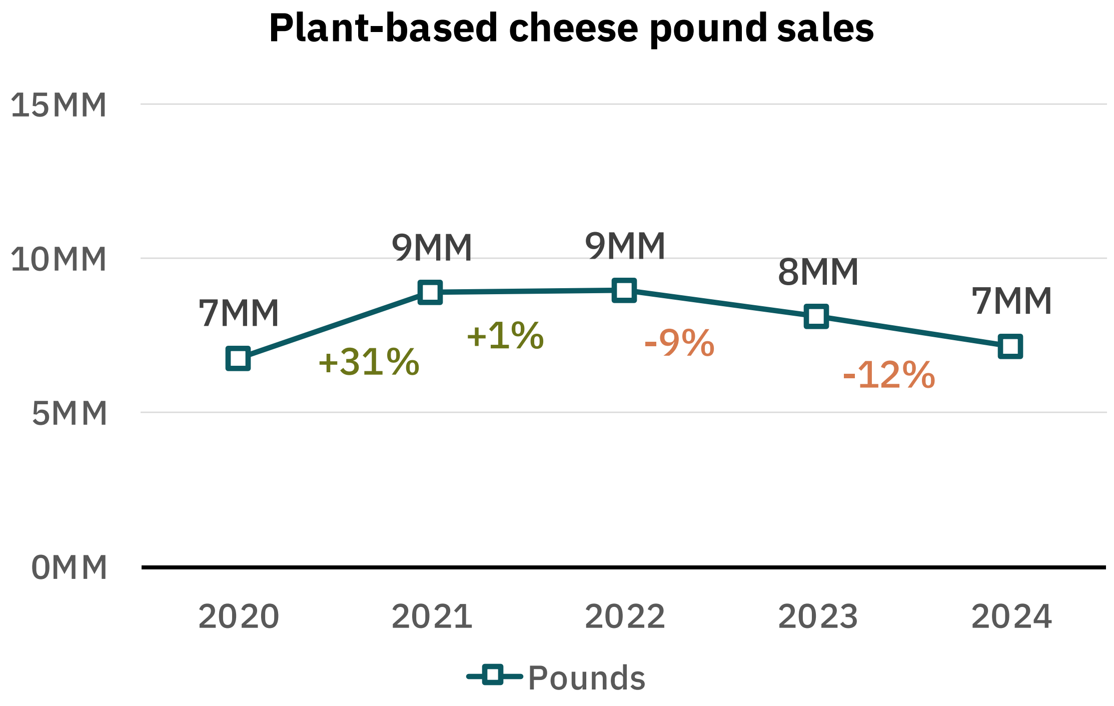
Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Creamer alternatives. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years..

Plant-based cheese experienced a dip in sales over the past two years

Following a period of growth, plant-based cheese experienced declines in both dollar and pound sales over the last two years. Dollar and pound sales were down -12% in 2024.



+6%
4-year $ CAGR

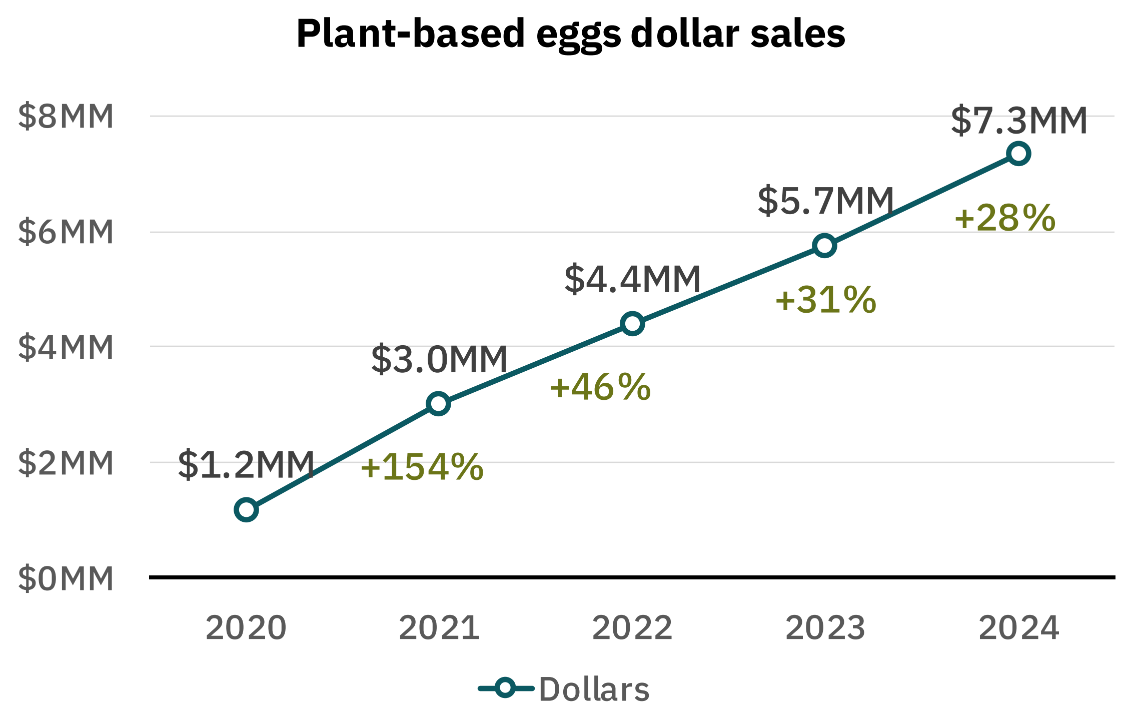


+1%
4-year pound CAGR

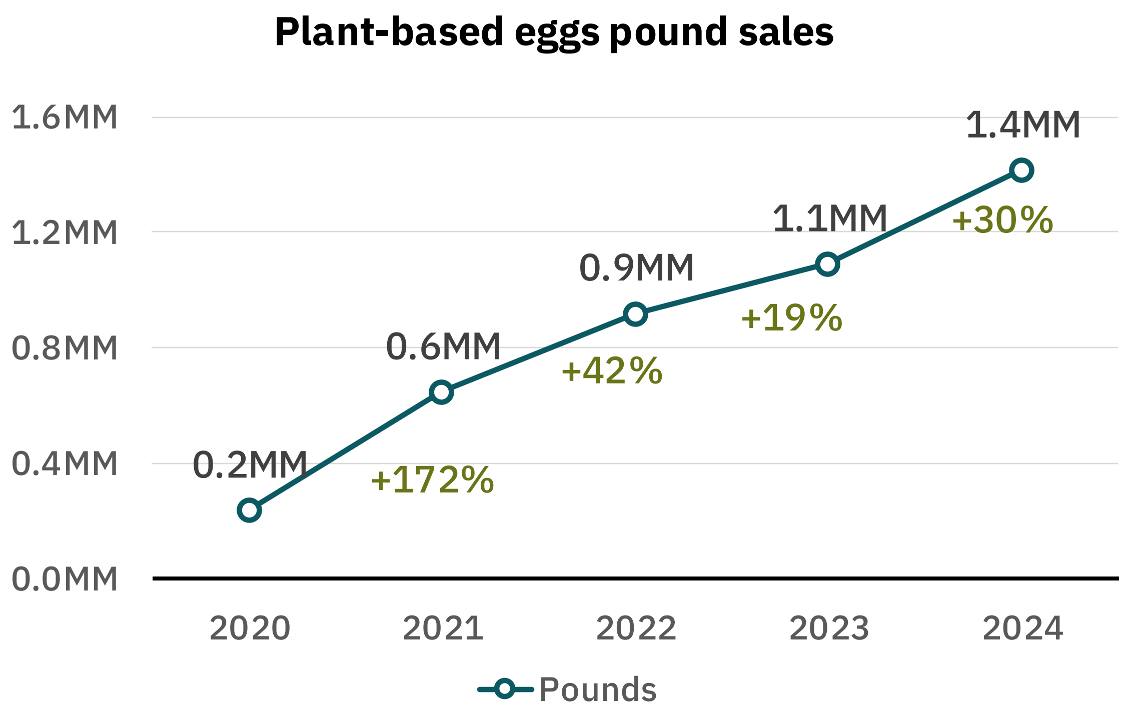
Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Cheese alternatives. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

Plant-based eggs are a small but rapidly growing category

Plant-based eggs were up 28% in dollar and 30% in pound sales in 2024 alone. The category has benefited from volatility in the conventional egg market as operators seek alternatives with more stable supply chains and price points.



+58%
4-year $ CAGR



+56%
4-year pound CAGR

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Egg alternatives. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

Plant-based and conventional categories grew in the past four years

The plant-based and animal-based categories we track have all grown since 2020 when overall foodservice sales dropped due to the Covid-19 pandemic. Plant-based creamer and proteins have experienced similar growth to conventional counterparts while plant-based eggs have far surpassed conventional growth rates.

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

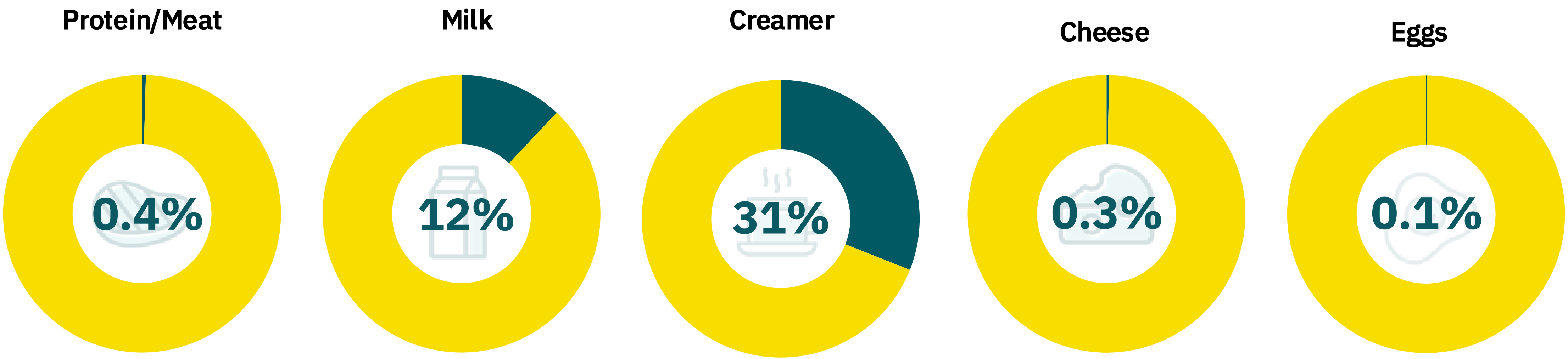
	Plant-based		Animal-based	
	2024 pound sales	4-year pound sales CAGR	2024 pound sales	4-year pound sales CAGR
Protein/Meat	57 MM	+4%	12.9 B	+6%
Milk	167 MM	+1%	1.2 B	+8%
Creamer	65 MM	+10%	145 MM	+11%
Cheese	7.2 MM	+1%	2.8 B	+7%
Eggs	1.4 MM	+56%	1.3 B	+9%

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 2024.

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.

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

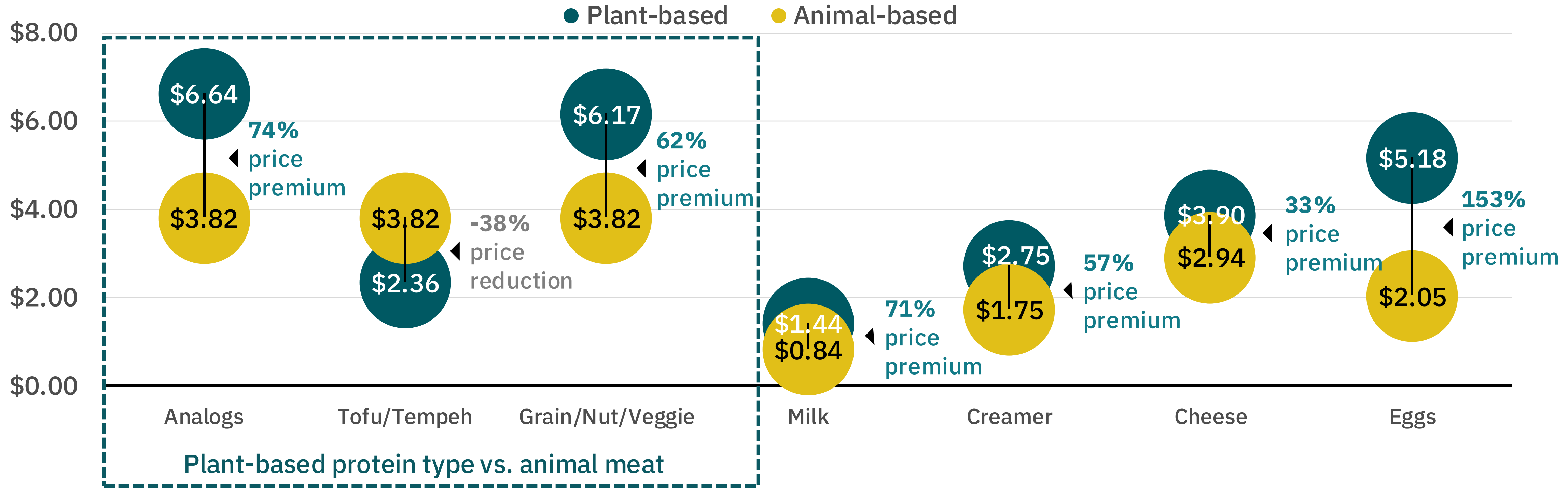


Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales. Plant-based proteins (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh), Animal-based meat (poultry, beef, pork, seafood, hot dogs/sausage/specialty meat), Cheese alternatives, Conventional cheese, Milk alternatives, Conventional milk, Creamer alternatives, Conventional creamer, Egg alternatives, Conventional Egg. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

Plant-based products are mostly premium priced to conventional counterparts

Plant-based meat analogs and milk are priced at about a 70% premium to conventional counterparts. Plant-based eggs have the largest price difference, although this has fluctuated recently with outbreaks of highly pathogenic avian influenza that have driven up the price of animal eggs.

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

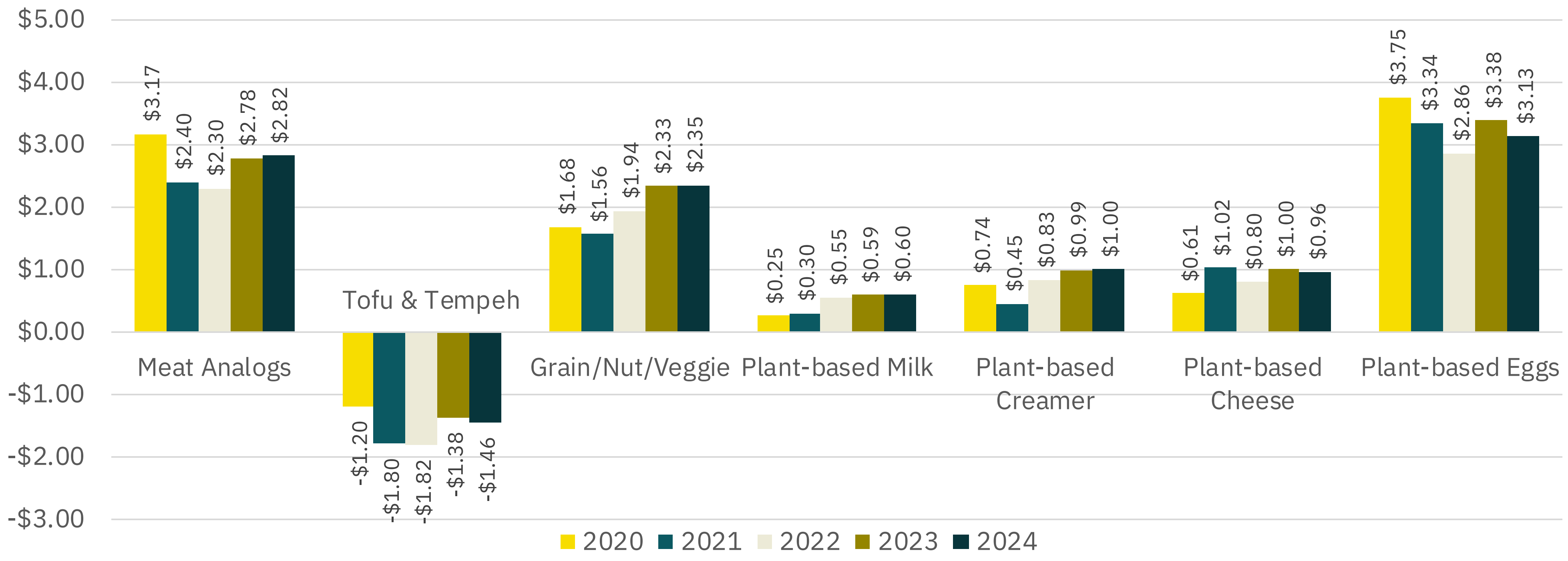


Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Plant-based proteins (analog meat alternatives), Animal-based meat (poultry, beef, pork, seafood, hot dogs/sausage/specialty meat), Milk alternatives, Conventional milk, Creamer alternatives, Conventional creamer, Cheese alternatives, Conventional cheese, Egg alternatives, Conventional eggs. Dollar and pound sales are 12 months ending December 2024.

Plant-based price premiums have persisted in recent years

Broadline distributor price gaps have fluctuated in recent years, often driven by instability in animal-based product prices due to supply chain issues. Plant-based dairy categories have seen a notable upward trend in price gap, although that may not be passed on to consumers. In fact, top coffee chains have recently removed plant-based dairy surcharges.

Plant vs. animal-based broadline distributor price per pound difference by year



Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Plant-based proteins (analog meat alternatives), Milk alternatives, Creamer alternatives, Cheese alternatives, Egg alternatives. Dollar and pound sales are 12 months ending December 2024.

Plant-based proteins deep dive

Key findings

01 ANALOGS ARE THE LARGEST PLANT 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.

02 BEEF SUBSTITUTES DOMINATE; PORK GROWING

When it comes to replacing conventional meat, plant-based beef substitutes account for almost two-thirds of analog pound sales. However, pork substitutes have been growing in both pound sales and share.

03 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 2024. Vegetable and pea protein-based products accounted for a quarter of sales.

04 NON-RESTAURANT OPERATORS INCREASED PLANT PROTEIN SHARE

Education, healthcare, business and industry, recreation, and government accounted for growing shares of plant-based protein sales in 2024.

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

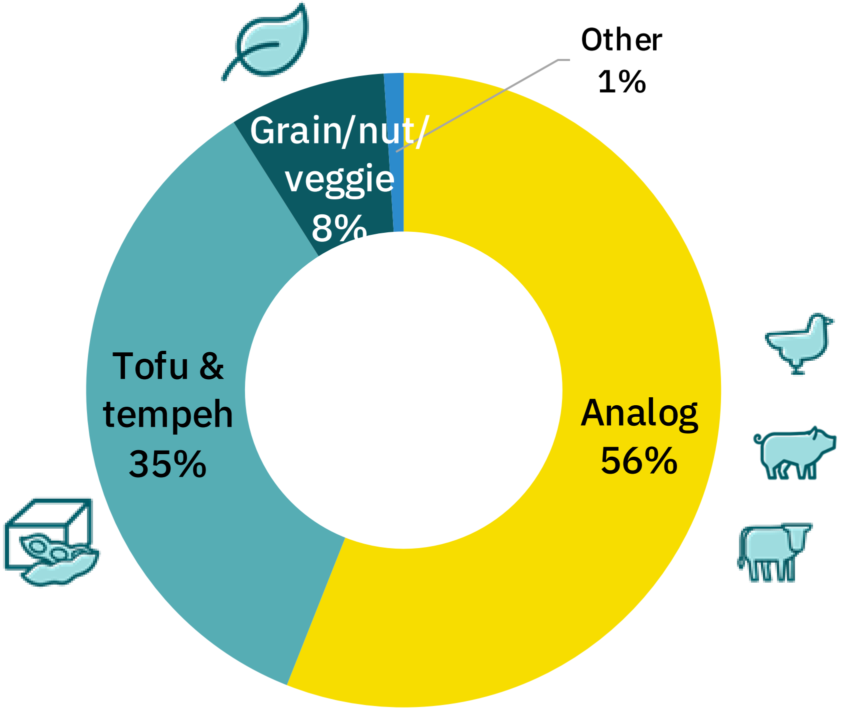
Plant-based protein products are further broken down into:

- **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 2024.

Analog product dominance reflects consumer demand for products that can act as a direct substitute for animal meat. However, both analog and grain/nut/veggie formats have seen sales decline in recent years. At the same time, tofu has grown, likely fueled by significantly lower price points.

Plant-based protein product type (pound share)

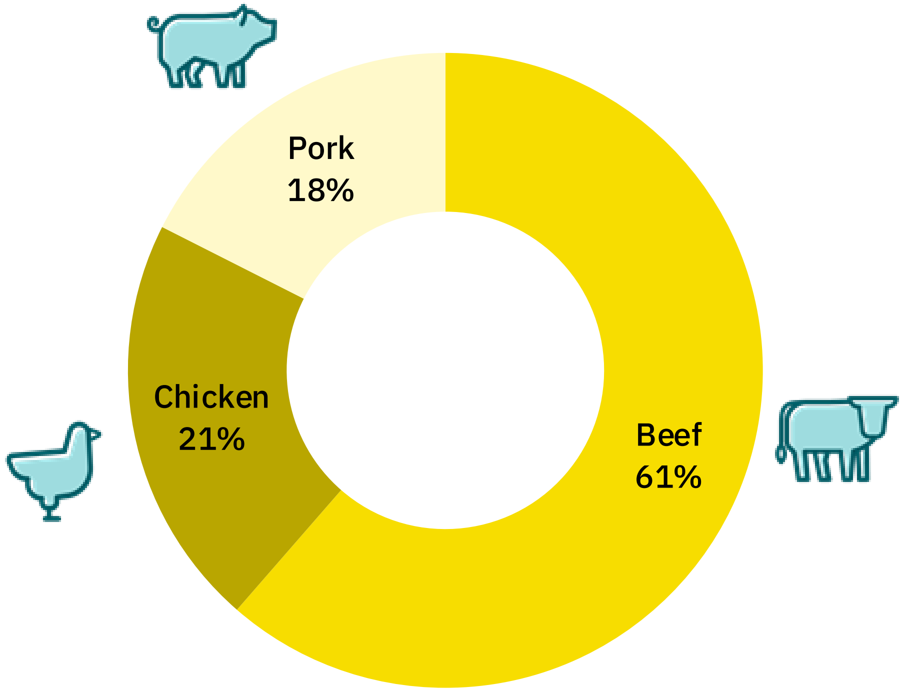


Source: Circana/SupplyTrack, , U.S. broadline distributor foodservice sales. Product Class: Plant-based proteins - Substitution Type (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh). Pound sales are 12 months ending December 2024. Note: Product substitution classifications (analog, tofu and tempeh, grain/nut/veggie) were re-evalutated by Circana in the latest data set 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.

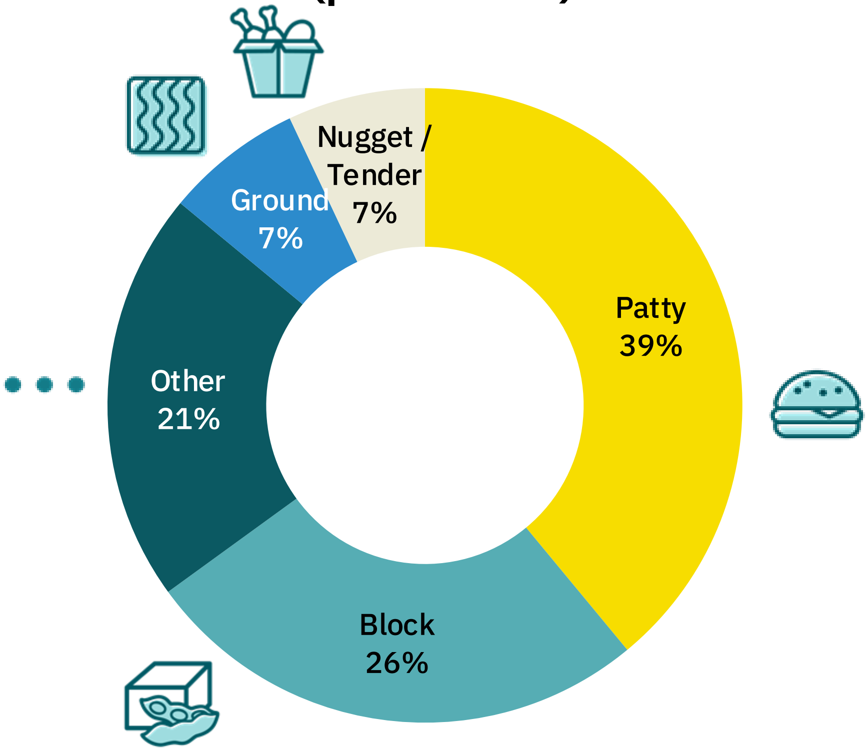
The plant-based proteins category is dominated by select types and formats

Almost two-thirds 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 a quarter of plant-based protein pound sales.

Plant-based protein analog type (pound share)



Plant-based protein format (pound share)

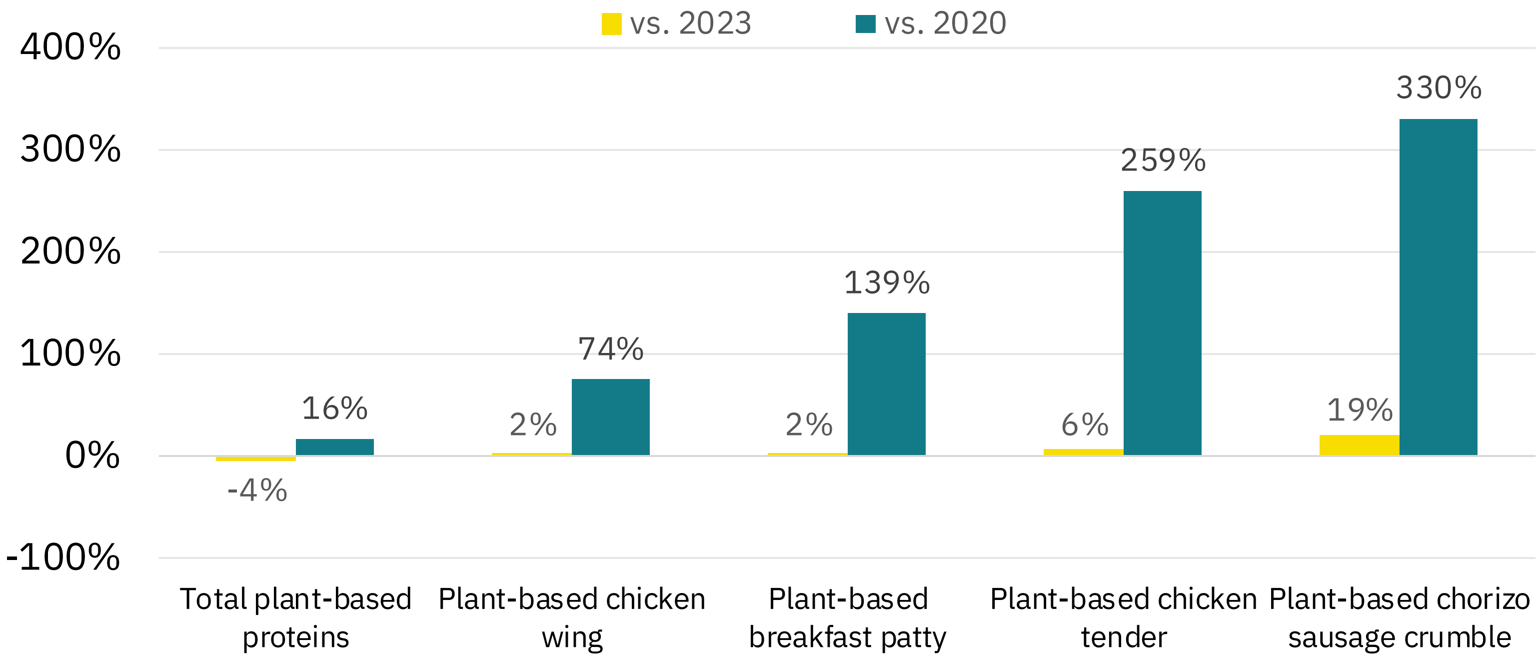


Source: Circana/SupplyTrack, , U.S. broadline distributor foodservice sales. Product Class: Plant-based proteins - Substitution Type (analogous meat alternatives, grain/nut/veggie alternatives, tofu/tempeh). Pound sales are 12 months ending December 2024.

Pork analogs grew as did select product formats

While beef analogs remain the largest plant-based protein sub-category, they declined in sales in 2024, while pork analogs grew. Specific pork analog formats fueled that growth including breakfast patties and chorizo crumbles. Other formats like chicken tenders and filets also grew.

Emerging plant-based protein formats: broadline distributor pound growth



-14%
Beef analogs

-2%
Chicken analogs

+4%
Pork analogs

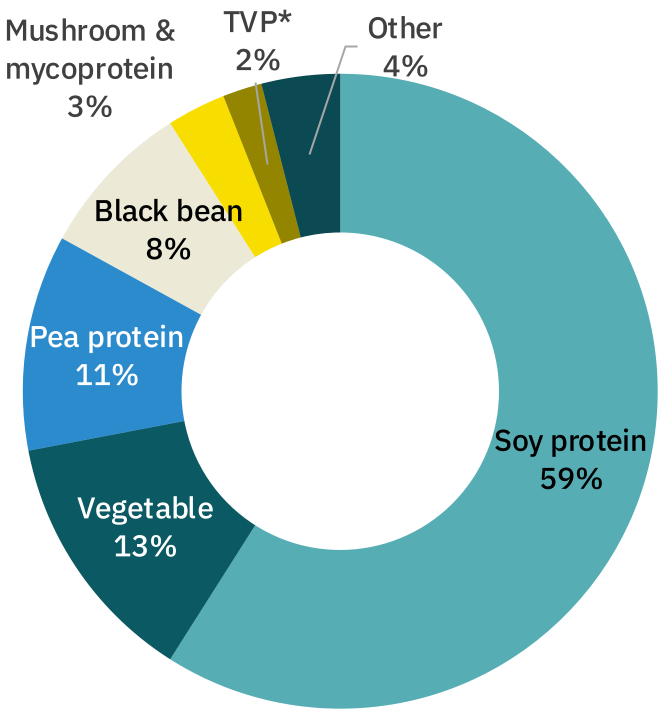
Source: Circana/SupplyTrack, , U.S. broadline distributor foodservice sales. Plant-based proteins – Sub type and Format. Pound sales are 12 months ending December 2024 vs 4 prior years.

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

Products with soy protein as the primary ingredient accounted for more than half of the plant-based protein pound sales in 2024. Vegetable, pea protein, and black bean-based products together represented almost a third of pound sales. Looking just at plant-based protein analog products, the distribution is similar, although soy protein is slightly less dominant with products using soy as the main ingredient representing 44% of pound sales for analog products.

While the plant-based proteins category has grown significantly in scope and variety in recent years, opportunities remain to diversify product types and ingredients to improve taste, price, health benefits, and functionality to better meet consumer demand.

Plant-based protein primary ingredient (pound share)



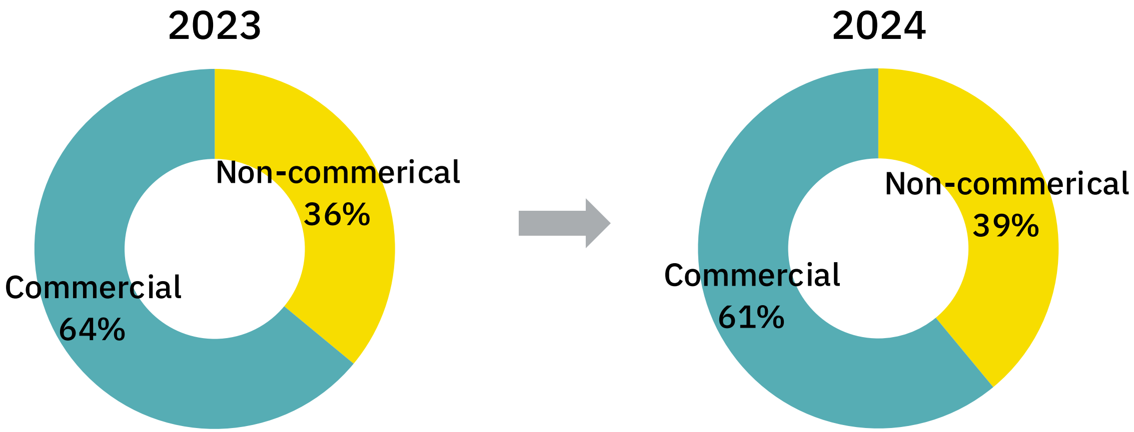
*Texturized Vegetable Protein

Source: Circana/SupplyTrack, , U.S. broadline distributor foodservice sales. Plant-based proteins - Format and Primary Ingredients. Pound sales are 12 months ending December 2024 vs 4 prior years.
Other ingredients include seitan/vital wheat gluten, vegetable/bean, quinoa, kale, chickpea/garbanzo bean, walnut, eggplant, beet & kale, adzuki/anasazi bean, jackfruit, tomato, rice and not specified.

Commercial operators dominate plant-based protein distributor sales

Commercial operators accounted for 62% of plant-based protein pound sales from broadline distributors in 2024. Within that, independent and large chains accounted for the highest shares of pound sales, indicating it is both the small (i.e., “mom & pop”) and very large (i.e., national chains) dominating plant-based sales. Non-commercial operators like education and healthcare purchasers increased share of pound sales in 2024.

Plant-based protein share of pound sales by operator type



Commercial operator breakout

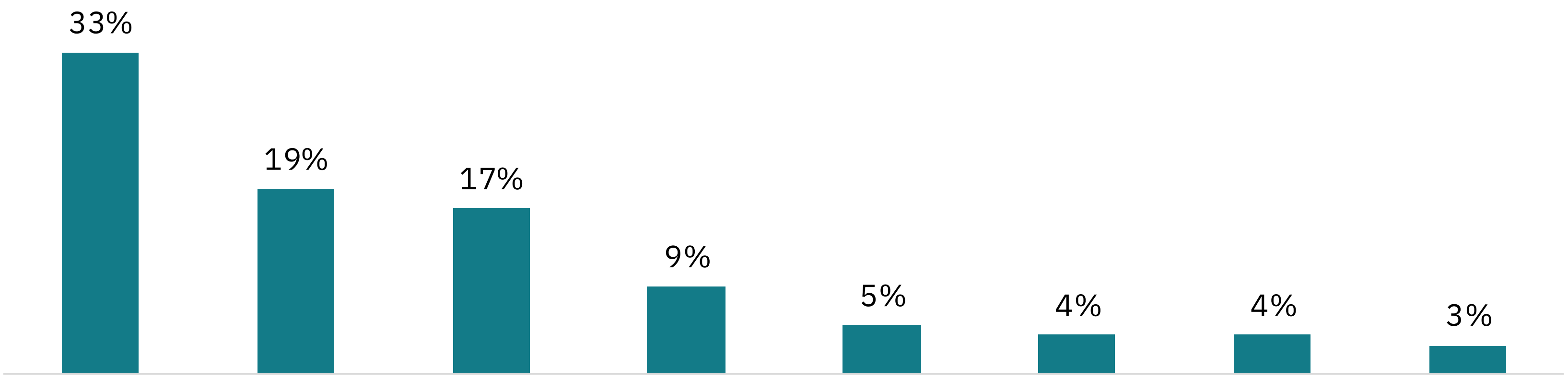
Independent chains (1-2 units)	16%
Small chains (3-99 units)	17%
Medium chains (100-249 units)	5%
Large chains (250+ units)	15%
Recreation	4%
Lodging	3%
Total commercial	**61%**

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Plant-based proteins. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

QSR accounts for the largest share of plant-based protein sales

Quick-service and full-service restaurants saw decreasing plant-based protein pound sales in 2024. However, other segments including education, healthcare, and business and industry saw growth in sales and share. Purchasing by education institutions has surged in recent years, expanding from a 9% share of plant-based protein sales in 2020 to 19% in 2024.

Operator segment share of total plant-based protein pound sales 2024



	Total plant-based proteins	Quick-service restaurants	Education	Full-service restaurants	Healthcare	Business & industry	Recreation	Lodging/Casino	Government
1-yr. dollar change	**-5%**	-13%	**2%**	-10%	**5%**	**12%**	**1%**	-5%	**18%**
1-yr. pound change	**-4%**	-12%	**1%**	-8%	**4%**	**19%**	**1%**	-4%	**15%**

Source: Circana/SupplyTrack, U.S. broadline distributor foodservice sales, Product Class: Plant-based proteins. Dollar and pound sales are 12 months ending December 2024 vs 4 prior years.

Consumer insights

Key findings

FOODSERVICE IS A KEY CHANNEL FOR PLANT-BASED CONSUMERS

01

Almost half of regular plant-based meat consumers report purchasing plant-based meat in foodservice in the past year. A quarter recall first trying plant-based meat in foodservice.

ADDRESSING TASTE AND PRICE GAPS IS CRITICAL FOR CONSUMER ADOPTION

02

Taste and texture as well as price are key barriers for consumers to choose plant-based dishes. Foodservice provides unique opportunities to address taste concerns with menu design and execution.

FOODSERVICE CAN HELP DRIVE AWARENESS AND TRIAL

03

About half of consumers say they have never heard of plant-based meat and others say they haven’t heard much recently or never think about it. Foodservice menu design and strategies like default plant-based can make plant-based options more top of mind.

CONSUMER SEGMENTS CAN INFORM FOODSERVICE STRATEGY

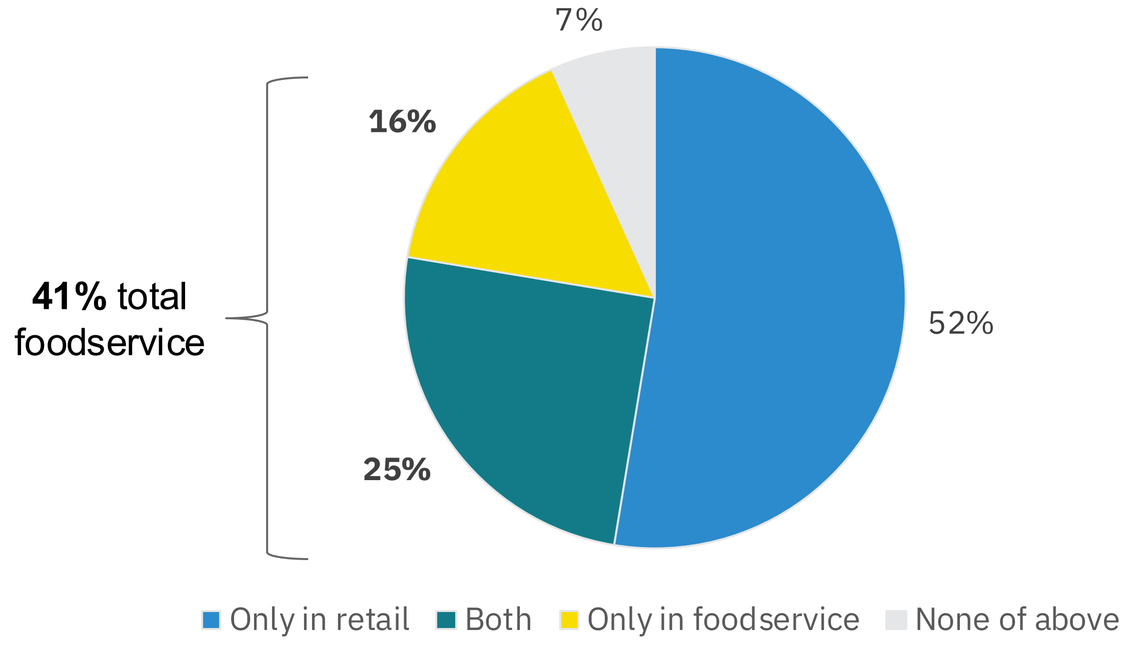
04

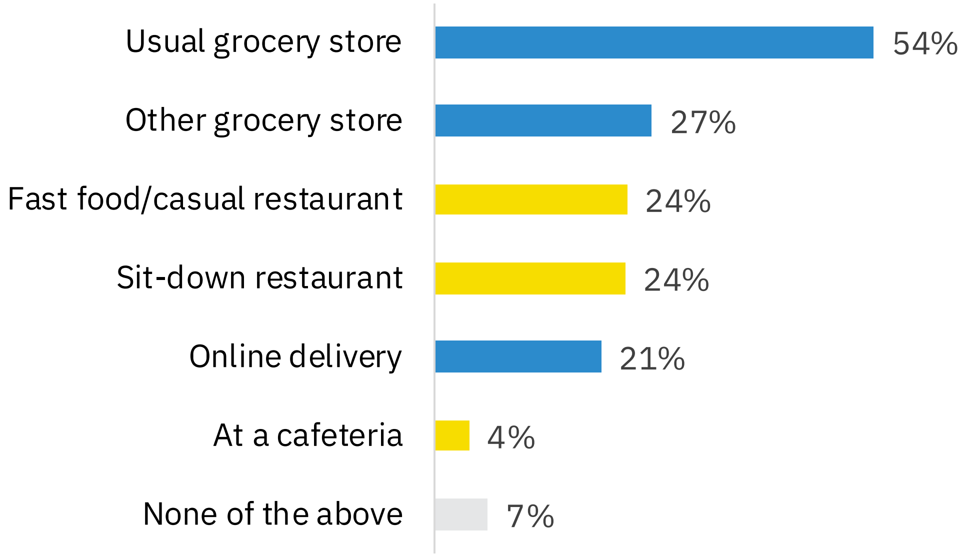
A large and diverse group of consumers is open to plant-based eating. Understanding the unique segments of consumers in the market can provide insights on how to drive plant-based adoption in foodservice.

Foodservice plays an important role in reaching plant-based consumers

Almost half of regular plant-based meat consumers report purchasing plant-based meat dishes in foodservice, including QSR and full-service restaurants and cafeterias, in the past year. Almost a quarter of consumers recall that the first time they tried plant-based meat was in foodservice.

Plant-based meat location purchased (% of regular plant-based meat consumers)





Source: GFI US Consumer Snapshot: Plant-Based Meat – Dec 2024. Poll by Morning Consult on behalf of GFI: =3,079 U.S. adults, among n=743 who report eating plant-based meat at least once a month in past year.
Survey Q: Over the past year, where did you purchase plant-based meat products or dishes with plant-based meat?

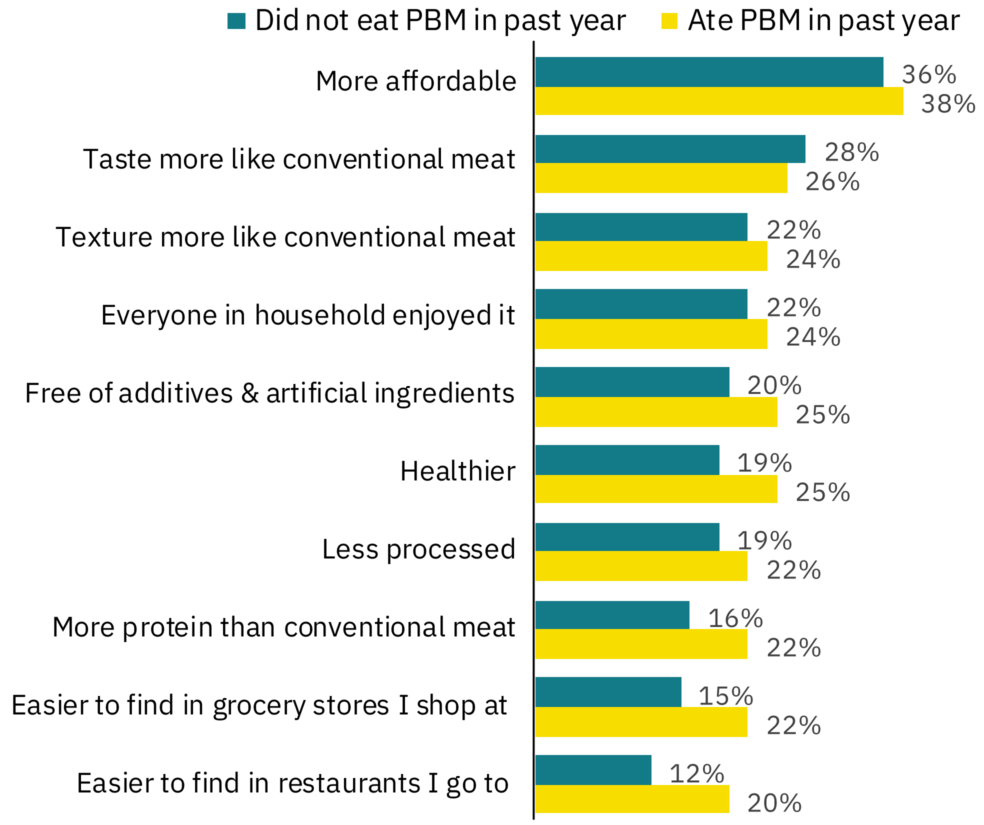
Price and taste are key barriers to consumers choosing plant-based

In a 2024 study conducted by GFI, both recent plant-based meat consumers and others said the top factors that would make them consider eating plant-based meat more are if it was more affordable and had improved taste and texture. Recent research by Datassential similarly found that the top barriers to consumers ordering dishes with plant-based ingredients in foodservice included "not being satisfied with the taste" (45% selecting) and "paying too much for vegetables and other plant-based ingredients" (27% selecting).

While price and taste are table stakes, there is also need to deliver a stronger value proposition for consumers.

For many, this means reinforcing core benefits around health. Notably, protein is a top health focus for many consumers today and a potential benefit for plant-based products to reinforce. The same Datassential research found "not getting enough protein" was also a top barrier to consumers ordering plant-based dishes (25% selecting).

Drivers to increase PBM consideration (% selecting in top five)



Sources: The Good Food Institute, Survey of n=3000 U.S. consumers aged 18-59, May 2024; Survey question: What, if anything, would make you consider purchasing plant-based meat [more]? Select up to 5 responses; Among consumers at least somewhat likely to consume plant-based milk/dairy; Answers with fewer than 20% selecting are not shown. (addressable market). Datassential– Plant-Forward Opportunity, 2025;

Foodservice provides unique opportunities to address taste concerns

Delivering better on taste is key to attracting and retaining consumers in the plant-based category, and foodservice can play an important role via menu design and marketing. According to research by Datassential, leveraging familiar flavors and dishes and providing lower risk ways for consumers to try can motivate them to choose plant-based dishes.

Motivators for choosing plant-forward restaurant dishes (% selecting)

44%
Has flavors I love

38%
Able to try it first or have a sample

30%
In a dish I know, love, or have had before

25%
Is an appetizer or small plate (not my full meal)

Source: Datassential– Plant-Forward Opportunity, 2025; Survey question(s): What would encourage you to choose a plant-forward option from the menu at a restaurant?; Datassential defines plant-forward as *"A style of cooking and eating that emphasizes and celebrates, but is not limited to, plant-based foods. This dietary pattern is also often referred to as plant-rich or flexitarian and may include various foods from animal sources but in reduced quantities and/or less frequently."*

Delivering an elevated taste experience can influence taste perceptions and encourage repeat purchases

Research from Dig Insights suggests that consumers more often perceive that plant-based options will not meet taste and texture expectations than agree this is an issue after they try them.

What consumers think

54% would not order a plant-based meat dish because they wouldn't like the **taste**

42% would not order a plant-based meat dish because they wouldn't like the **texture**

What consumers experience

Nearly **90%** who had tried a plant-based meat dish were satisfied with the **taste, texture,** and **value**

Similarly, GFI found 38% of consumers who had never tried plant-based meat cited taste concerns as a barrier, while only 18% who stopped eating plant-based meat said taste was the reason.

Sources: Dig Insights & Upsiide, Growth in the Plant-based Space: What The Industry Needs To Know In 2024; GFI, Consumer snapshot: Plant-Based Meat in the U.S., 2024.

Taste also plays a critical role in winning over chefs and getting on the menu, and working effectively with chefs helps ensure that plant-based dishes deliver a positive taste experience that can motivate consumers to buy again.

Check out GFI's best practices for engaging with foodservice operators to learn more.

Foodservice menu and marketing strategies can help drive adoption of plant-based foods

Awareness and availability play an important role in driving consideration. According to GFI research, 32% of U.S. adults say they have never heard of plant-based meat (or are unsure). Among consumers who have eaten plant-based meat but not in the past year, 23% indicate a top reason is "just not thinking about it."

Prominent menu placement and strategies like default plant-based can build awareness and make plant-based more top of mind.

In 2023, the Food For Climate League, in partnership with Better Food Foundation, Sodexo, and researchers at Boston College, tested the implementation of default plant-based dishes in U.S. university dining halls. Among the two universities that implemented default plant-based dishes consistently, the selection of plant-based dishes rose from 31% on control days to 82% on days where plant-based offerings were the default option. World Resources Institute's playbook outlines additional interventions that can encourage diners to select plant-based dishes.

Source: GFI, Consumer snapshot: Plant-based meat in the U.S., 2024
Image courtesy of iStock.com/andresr

Understanding unique attitudes and motivations of consumer segments open to plant-based eating can help guide foodservice strategy

Consumer segments open to plant-based meat

	Ethical Alternative Seekers	Health-Conscious Compromisers	Nutrition-Focused Integrators	Protein Maximizers	Carefree Considerers	Value-Driven Skeptics
Defining attitudes and motivations	Conscientious consumers who care about sustainability and animal welfare and are careful about what they put in their bodies. Often vegetarian/vegan.	Strive to make better food choices for their health but don't want to sacrifice taste and variety. Worry about health issues associated with animal meat.	Pay close attention to what they eat, caring about nutrition and experience. Still enjoy animal meat but have diverse health and sustainability concerns.	Value protein, as a comfort food and a way to look and feel their best. Attached to animal meat but open to PBM as another source of protein	Relatively few health concerns, don't worry much about what they eat, and stick with what they know. Open to PBM but often unfamiliar and not choosing it today.	Price- and taste-focused consumers who feel eating animal meat is natural. Not opposed to PBM but aren't convinced it's a good choice for them.
Demographic skews	Younger (Gen Z skew), more female, smaller HHs, ethnically diverse	Older (Gen X skew), more female, no kids (at home), suburban	Majority (older) Millennials, more male, kids at home, urban	Majority Millennials, more male, kids at home, urban	Young (Gen Z skew), ethnically diverse	Slightly older, more female, smaller HHs, suburban and rural
Key elements of PBM value proposition	More sustainable, No animal suffering, Better for workers	Better-for-you, Help avoid disease	Nutritious package, Help look and feel good	Lean protein, Energy	Lean protein, Energy	Low fat/cholesterol/ calorie

Most likely to say they would consider plant-based meat in foodservice

Source: The Good Food Institute, Survey of n=3000 U.S. consumers aged 18-59, May 2024
Note: PBM = plant-based meat

There is untapped potential to reach consumers with plant-based offerings in foodservice

There is a large addressable market for plant-based foods.

In a 2024 study conducted by GFI, almost three-quarters (71%) of U.S. consumers aged 18-59 representing diverse attitudes and motivations said they are at least somewhat likely to eat plant-based meat and/or dairy in the future. Half of those consumers said they would be likely to consume plant-based meat in restaurants or cafeterias. This was even higher among certain segments of consumers.

Availability of plant-based meat dishes in foodservice would motivate consumers to eat plant-based more.

More than one in 10 consumers say a top five factor that would make them consider plant-based meat more is if products were easier to find in restaurants they go to. Among those who have eaten plant-based meat in the past year, this rises to two in 10 who say they would consider plant-based meat more often if it was easier to find in restaurants.

Source: The Good Food Institute, Survey of n=3000 U.S. consumers aged 18-59, May 2024.

Check out GFI's consumer segmentation to learn more about the addressable market for plant-based meat and how to leverage segment-based insights to drive consumer adoption.

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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

GFI, in partnership with the Plant Based Foods Association, 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 19 participating broadline distributors, data from 280+ categories, and collects 700K+ operator purchases monthly.

SupplyTrack covers about 42% 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 2020, 2021, 2022, 2023, and 2024, all 12 months ending in December.