Household shopper insights for plant-based meat in the United States

Understanding the U.S. plant-based meat retail landscape through analyzing household purchases.

Ben Pierce, Senior Market Research Analyst

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Plant-based meat remains a meaningful category in U.S. retail grocery stores and one ripe with potential. Take a closer look at who is buying plant-based meat, plus their purchase frequency, motivators, and barriers. Then go deeper on continued opportunities to engage shoppers in this emerging category.

Introduction

Over the last decade-plus, the plant-based meat category in U.S. retail has gone from a niche subset of items to a burgeoning category. Focused on appealing to mainstream, meat-eating consumers, companies have launched hundreds of new products that look, cook, and taste more like conventional meat than ever before. This has drawn in a larger consumer base beyond vegetarians and vegans—today, 95 percent of all households who purchase plant-based meat also buy conventional meat.

The category has nearly doubled in U.S. retail sales from $682 million in 2017 to upwards of $1.24 billion in 2023. However, muted sales growth in the last few years indicates that the category's future success is not inevitable. While the shoppers who spend the most on plant-based meat have maintained their engagement, the category has struggled to transform dabblers into loyalists. Yet despite recent challenges, plant-based meat remains a category with untapped potential given the vast scale of the market for next-generation plant-based proteins—the mainstream, meat-eating consumer.

Today, roughly 85 percent of U.S. households do not purchase plant-based meat and half of U.S. consumers say they're not too familiar or not at all familiar with plant-based meat in general.[2]

Meanwhile, the most engaged segment of plant-based meat buyers—those who also purchase conventional meat—spent nearly a third of their total meat purchases on plant-based meat in 2022.[1] This highly engaged group of households is driving category sales.

Between the highly engaged and the unfamiliar lies a vast runway of opportunity for the category to win over consumers and compete with the $100 billion-plus conventional meat category.

This paper takes a closer look at who the plant-based meat shopper is at retail in the United States, when they purchase, why they purchase, and barriers holding back the category from better reaching current and future shoppers.

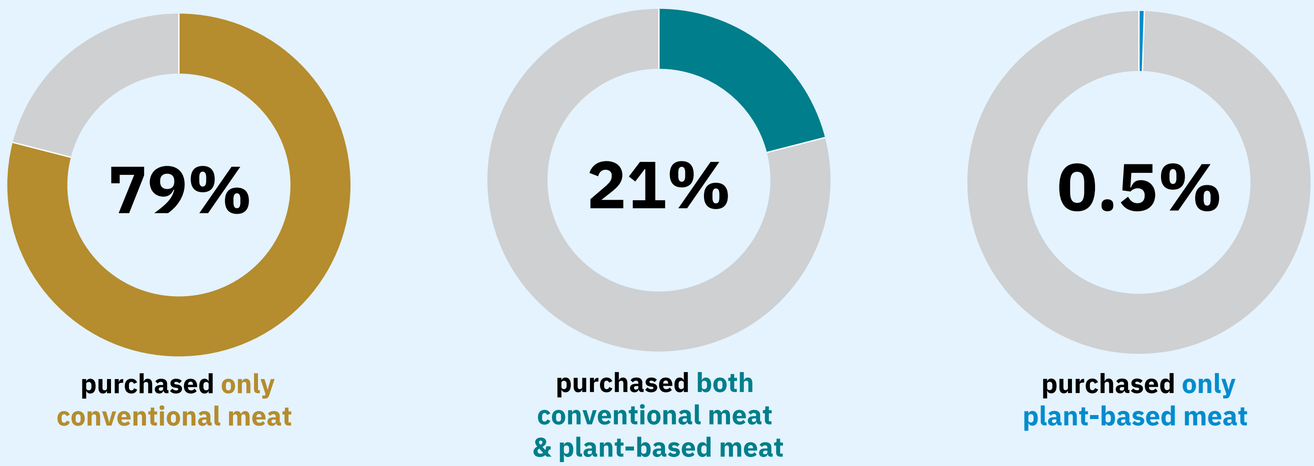
For more on the sources of the data and the methodology of the studies referenced throughout, visit the Sources and methodology section.

Note: *This report draws heavily from a NielsenIQ migration analysis that looked at household purchases from 2019 to 2022. Given the evolving landscape over the last two years, updated data points and insights are included from other resources to supplement the findings of this migration analysis.*

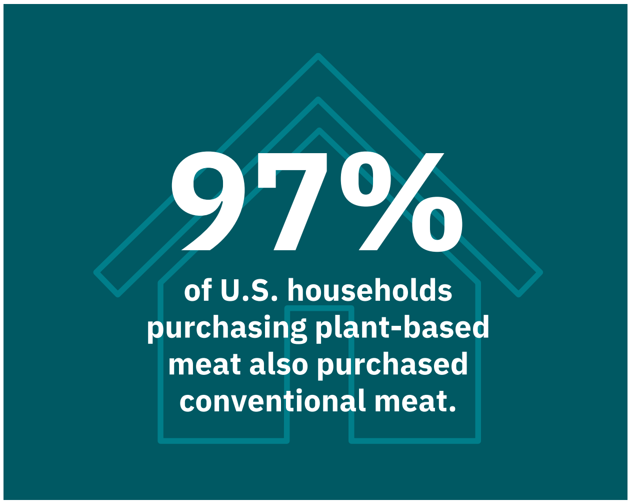
Household penetration

The vast majority of U.S. households—98 percent, or nearly 125 million households—purchased in the overall meat category (conventional and/or plant-based meat) in U.S. retail settings in 2022.[1]

Breaking that down further, we see that 79 percent of households purchased conventional meat only, roughly one in five households purchased both conventional and plant-based meat, and less than one percent purchased plant-based meat only.[1]



Of those purchasing plant-based meat, 97 percent also purchased conventional meat.[1] This demonstrates that fully vegetarian and vegan households aren't the only ones buying plant-based meat, but rather, meat-eating households are driving plant-based meat category purchases.



This highlights the large market opportunity to engage households who regularly buy center-of-the-plate protein with plant-based meat products that can meet their needs.

It's important to note for the purposes of this analysis that one purchase in the category throughout the given year is sufficient for a household to be considered a category purchaser. It's also important to analyze the level of engagement and frequency with which households purchase in the plant-based meat category, which we investigate further in the Purchase frequency section.

Demographics

Demographic breakouts are a helpful tool for understanding which consumer groups are most or least engaged in the plant-based meat category. **These lists represent which household demographic groups are overrepresented or under-represented in the given buying category/categories relative to the total population:**[1]

Households who purchased **both conventional and plant-based meat**:

Category	Over-indexed demographics	Under-indexed demographics
Age	35 and under	65 and older
Household type	Households with young children only <6 Any size household, no children, <35 2+ person household, no children, 35–54	1 person household, no children, 65+ 2+ person household, no children, 65+
Region	West	
Race & ethnicity	Asian	
Income	$100K+	$20K–$30K

Households who purchased **plant-based meat only**:

Category	Over-indexed demographics	Under-indexed demographics
Head of household	No female head of household	
Age		45–54 55–64
Household type	Any size household, no children, <35 1 person household, no children, 35–64 1 person household, no children, 65+	Households with young children only <6 Large households with children 6+, head of household <40 2+ person household, no children, 35–54 2+ person household, no children, 55–64
Region	West	Central
Race & ethnicity	Asian	
Income	$20K or less $30K–$40K	$40K–$50K $100K+

Households who purchased **conventional meat only**:

Category	Over-indexed demographics	Under-indexed demographics
Race & ethnicity		Asian

The majority of plant-based meat dollar sales come from households purchasing both conventional and plant-based meat. These households tend to be located in the West region, have multiple household members, earn a higher income, and have heads of households younger than 35.[1]

This finding is further supported by Mintel's 2023 U.S. plant-based proteins report, which found that consumers aged 18–34 with household incomes greater than $75,000 per year were among the most likely to purchase plant-based meat alternatives. And notably, nearly half of that group purchased in the plant-based meat category in the latest three months.

The shopping behavior of younger generations will play a meaningful role in future food trends. Credit Suisse estimated that spending of Gen Z and Millennial consumers is estimated to rise from 48 percent in 2020 to 69 percent by 2040. Notably, a Morning Consult survey conducted on behalf of GFI in August 2023 found that Millennials are significantly more likely than Baby Boomers and Gen Xers to say they're likely to purchase plant-based meat products based on what they know.[2]

Self-reported flexitarians (who eat mostly meatless meals but allow for animal-based foods) are also more likely to be plant-based meat purchasers. According to the same Morning Consult survey, 55 percent of flexitarians have purchased plant-based meat in the past year compared to just 28 percent of omnivores or 34 percent of the general population.[2] Tapping into the omnivore market is a major opportunity for plant-based meat as Gallup reports that only five percent of consumers identify as vegans or vegetarians.

Additionally, among the 39 percent of consumers reporting that they haven't tried plant-based meat alternatives, 21 percent say they have been eating less meat over the past two years and 72 percent are not too familiar or not at all familiar with the products.[2] This highlights a major opportunity for the plant-based meat category to position itself as a solution for those consumers looking for zero-sacrifice ways to reduce their conventional meat consumption.

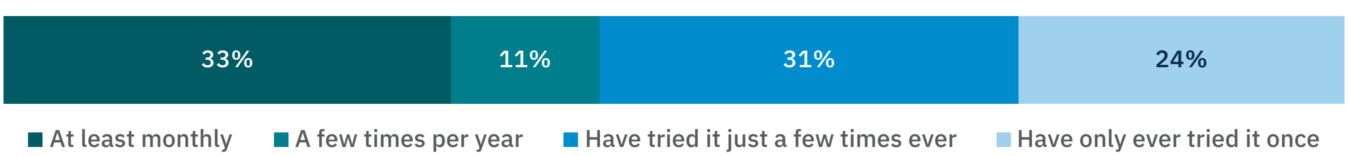
Understanding which consumer groups are most engaged can highlight areas of opportunity for the category to expand and build a broader buyer segment. For example, plant-based purchasing households tend to show up disproportionately in the Western region, which accounts for roughly 22 percent of all U.S. households.[1] Emphasizing bottom-of-funnel marketing strategies to secure conversion and loyalty in that region could further improve engagement. And focusing on top-of-funnel awareness and consideration marketing strategies in other regions may be an opportunity to bring in new consumers. From an accessibility standpoint, almost 65 percent of all U.S. households have incomes under $100,000, yet it's the $100,000+ households that tend to over-index for purchasing both conventional and plant-based meat.[1] Working to close the price gap to conventional products may play a role in reaching the majority of U.S. households.

Purchase frequency

Morning Consult's August 2023 survey of 2,210 U.S. adults conducted on behalf of GFI indicated that of the approximately half of U.S. adults who say they've tried plant-based meat, over half have tried just a few times or less:[2]

How frequently do you eat plant-based meat products?

Among adults who have tried plant-based meat (n=1,176)



This leaves an enormous runway of largely unengaged potential consumers: approximately three-quarters of the population has either never tried plant-based meat, or has eaten it no more than a few times ever. Today, retail engagement in the plant-based meat category is driven by a relatively small yet loyal group of households and consumers. Unlocking more consumers and higher frequencies of purchase is a large opportunity. Attracting more of these potential consumers to the category and meeting their product needs to ensure higher repeat rates could be critical for the category's long-term growth.

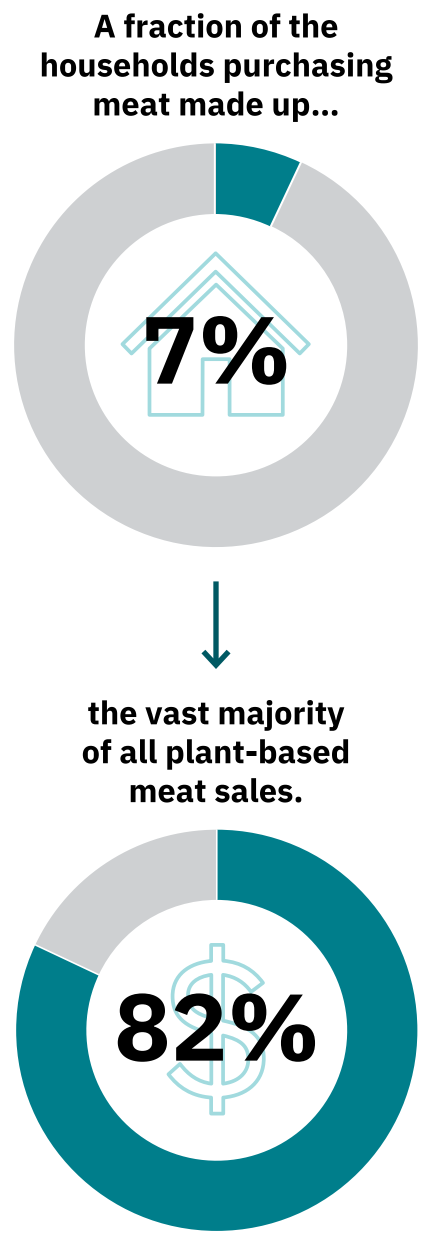
A GFI-commissioned migration analysis conducted by NielsenIQ further drills down into the characteristics of households engaged in the plant-based meat category: This analysis showed that in 2022, 21 percent of households purchased *both* conventional and plant-based meat, compared to 79 percent of households who purchased only conventional meat, and 0.5 percent of households who purchased plant-based meat only (very few purchase neither).[1]

By further breaking down the households who buy both plant-based and conventional meat into thirds based on their total plant-based meat spend, we can better understand the distribution of engagement with the category.

- The top third (for plant-based meat-spend) of households purchasing both (thus making up 7% of total households) accounted for 82% of all plant-based meat spending in 2022. In other words, just 7% of total households are responsible for 82% of the total plant-based meat spend.[1]
- The remaining plant-based meat spending was split between the middle third (12% of dollars), the low third (3% of dollars), and the households who purchased only plant-based meat (2%). This dynamic strongly evokes the familiar 80/20 rule whereby 80% of sales for a given business come from just 20% of customers.[1]
- For these categories, a similar dynamic holds for unit sales—the top segment purchases 6x more units per household than the middle third and 15x more units than the low third.[1]

Not only does this highlight that a core, relatively loyal group of plant-based meat consumers is driving category sales, but that there is also a large opportunity to drive purchases for current, lower-frequency consumers.

Key opportunity: Increasing the sales from medium-engaged plant-based meat households (seven percent of total households) to match purchasing of the top-engaged households would result in a 70 percent larger plant-based meat category by dollar sales.[1]



Another very notable dynamic is that this top-third segment spent 33 percent of their total annual meat dollars on plant-based meat compared to 67 percent on conventional meat.[1] This is compared to the middle segment, which spent seven percent of their total meat spending on plant-based, and the low segment, which spent two percent of their total meat spend on plant-based.[1]

Although this highly engaged group of consumers does exist, they still account for just seven percent of all meat-eating households and still spend the majority of their meat purchases on conventional meat. This suggests value for retailers and manufacturers to further captivate these buyers and drive long-term loyalty to the plant-based category while continuing to attract new households to the segment.[1]

Opportunities exist to grow engagement with consumers across the current purchase frequency scale from low to high. Additional research is needed to better understand the relative size of the opportunity within each group and best practice strategies to reach these consumers effectively.

Purchase segments

From 2023 SPINS point-of-sale data, the plant-based meat retail segment is dominated by its top five formats that capture nearly 80 percent of category dollar sales:

- Patties
- Nuggets, tenders, and wings
- Grounds
- Hot dogs, brats, and sausages
- Breakfast links and patties

Beef is the leading product type at over a third of dollar sales, followed by chicken and pork each accounting for roughly a fourth of the category.

Dive deeper into multiple plant-based food category market insights from 2023 on GFI's retail market page featuring SPINS data commissioned and analyzed by GFI and PBFA.

From GFI's Migration study in partnership with NielsenIQ, looking across four years of household purchases from 2019–2022, the top-selling segments within plant-based meat were frozen plant-based beef, frozen plant-based chicken, refrigerated plant-based beef, and tofu.[1]

Both frozen and refrigerated plant-based beef as well as tofu saw the most sales in year three (2021) while frozen plant-based chicken did in year four (2022).[1] This tracks with the growing number of product launches in the plant-based chicken space in recent years following much of the initial beef alternative products hitting the retail market.[1]

Interestingly, for households who purchased both plant-based and conventional meat in all four years, frozen and refrigerated plant-based beef were the top two selling plant-based categories in two of the first three years.[1] In year four, frozen plant-based chicken jumped to the second largest segment for this group of households, and the previously mentioned plant-based beef segments saw significant dollar sales declines from year three to year four.[1]

Notably, for households who went from only buying conventional meat to buying both by year four, frozen and refrigerated beef were the top two plant-based segments in the final year.[1] This may suggest that households entering the plant-based meat category first turn to beef alternative products before exploring other segments.

This underscores the opportunity for manufacturers and retailers to continue to lean into meat types that resonate most with shoppers while expanding offerings to further diversify the plant-based meat assortment at retail. Recent launches in plant-based seafood and whole cuts are one sign that the category is continuing to evolve.

Nearly all (97 percent) of the households purchasing plant-based meat also purchased conventional meat.[1] These households, on average, spent 23 percent more on all meat purchases compared to households buying just conventional meat.[1] The vast majority of this increase comes from plant-based meat purchases versus an increase in conventional spending.[1] Buyers of plant-based meat also tend to purchase in other plant-based categories such as plant-based milk and ice cream at higher rates than the average household.

This cross-purchasing behavior highlights the value that plant-based meat sets play at retail. Prioritizing and optimizing space for these products is a key strategy for retailers looking to get these high-value shoppers in the door. While a decade ago, shoppers may have had to shop at specialty and natural grocers for their plant-based needs, it's increasingly possible for shoppers to find a wide variety of options at grocery and mass chains. Ensuring these shoppers' needs are met in one location can be a clear value proposition for a retailer.

Occasions

Purchasing products at retail for at-home consumption remains at the center of many plant-based meat-eating occasions, although eating with friends or family and eating out are also quite common. The most frequent occasions consumers report consuming plant-based meat include:[2]

- Cooking at home (49% of U.S. adults who have tried plant-based meat more than once)
- Eating at a friend/family member's house (32%)
- Eating at a restaurant (32%)

The vast majority of plant-based meat retail sales in the United States come from traditional grocery chains, mass merchandisers, and club stores. Specialty natural chains such as Sprouts or Natural Grocers are important origins for many plant-based categories, and broader food trends, despite that channel capturing a smaller share of sales. For example, plant-based milk captures roughly 15 percent of the total milk market across all of retail but 41 percent when looking at the natural channel alone. E-commerce has also carved out a small, similar to the natural channel, and growing role in retail food sales and will likely continue to emerge as a critical channel for all food categories.

In grocery stores, the majority (68 percent) of plant-based meat dollar sales come from the frozen department, compared to 30 percent coming from refrigerated sets and the remaining (~two percent) from shelf-stable grocery aisles. However, it's notable that over the past decade, much of the innovation in plant-based meat products has been driven by refrigerated products that are merchandised in the meat aisle, so as to be most accessible to mainstream consumers looking for center-of-plate protein.

Store placement of plant-based meat often varies by retailer. Some may place plant-based meat products adjacent to conventional meat items, as is the case with most plant-based milk and conventional milk store sets, while others might dedicate an entirely separate section to plant-based foods. Based on current research, it appears clear that merchandising products in a given store location can reach distinct consumer groups—and that cross-merchandising across these locations can be key to capturing multiple segments. For example, placing meat alternatives in the produce section appears to engage consumers who may be meat excluders or meat reducers such as vegetarians, pescatarians, and vegans, while placing meat alternatives in the meat department can offer a better opportunity to engage omnivore consumers by presenting them with plant-based meat products in the area of the store where they regularly purchase center-of-plate protein.

Other studies support the idea that merchandising plant-based meat in the produce section alone is not preferable for reaching mainstream consumers. The general shopper's preference is to purchase plant-based meat in the refrigerated meat aisle, the frozen meat aisle, as well as in a dedicated plant-based foods set. Placement in a familiar location like the meat department can expose mainstream consumers to plant-based meat products and drive growth and trial. Placement in the plant-based meat set (e.g., in the produce department or in a separate area) is important for maintaining engagement with meat limiters.

A 2023 survey conducted by DIG Insights in collaboration with GFI and the Plant Based Foods Association underscored the benefits of cross-merchandising plant-based meat products in multiple store departments to meet the needs of multiple consumer groups:

- Among **weekly** plant-based meat consumers, ~30% preferred fully integrated merchandising, and ~30% preferred integrated-segregated.
- Among **monthly-or-less** plant-based meat consumers, about a quarter preferred fully integrated merchandising, while almost half preferred integrated-segregated.
- Still other consumers preferred to shop for plant-based products in a natural set or a fully dedicated plant-based set.

As we know, the majority of plant-based meat sales currently come from consumers also purchasing conventional meat. The largest opportunity for growth is to further engage meat-eating consumers. Cross-merchandising in the meat aisle, the frozen section, and the dedicated plant-based set is the most intuitive way to appeal to a broad set of consumer groups, enabling consumers to shop in a familiar place and also discover new products in this emerging category.

Understanding where individuals are buying plant-based meat products and for which occasions is important to better position these items to meet consumers at the right moment.

Spotlight: New plant-based meat dollar volume

New plant-based meat volume tends to come from households increasing their category spends.

In parallel with the migration analysis, in 2022 GFI also commissioned a shifting analysis from NielsenIQ.* The shifting analysis examined where gross new plant-based meat dollar volume was sourced, from one year to the next:

- 63% came from market expansion (households who were already buying plant-based meat buying more of it). This is consistent with data that shows that most plant-based meat buyers are repeat purchasers. (From panel data, we know that 62% of households purchasing plant-based meat make repeat purchases within the category. Among plant-based categories, this rate is second only to plant-based milk, at 79%.)
- 18% came from households who completely switched from buying animal-based meat to plant-based meat (for example, households who have gone vegetarian).
- 17% came from new households who were previously not purchasing in the plant-based meat category but had been purchasing conventional meat (and continued to).
- 2% came from households who were previously not purchasing in *either* the plant-based or animal-based meat categories.

What's the story? The vast majority of new plant-based meat sales volume comes from households who are actively purchasing in both plant-based and animal-based meat categories. This makes sense, given that we know that 97 percent of households who buy plant-based meat also purchase conventional meat. Indeed, plant-based meat shoppers are active in not only the animal-based meat category, but also across plant-based dairy and egg categories. Households who are active in the plant-based space tend to be active across plant-based categories.

According to SPINS data from 2023, of households who purchased both plant-based and conventional meat, 67 percent also purchased plant-based milk and 22 percent purchased plant-based ice cream and frozen novelties. This was higher than the baseline rates of total households purchasing in those categories, which was 44 percent for plant-based milk and 10 percent for plant-based ice cream, demonstrating the many consumers cross-purchase across multiple plant-based categories.

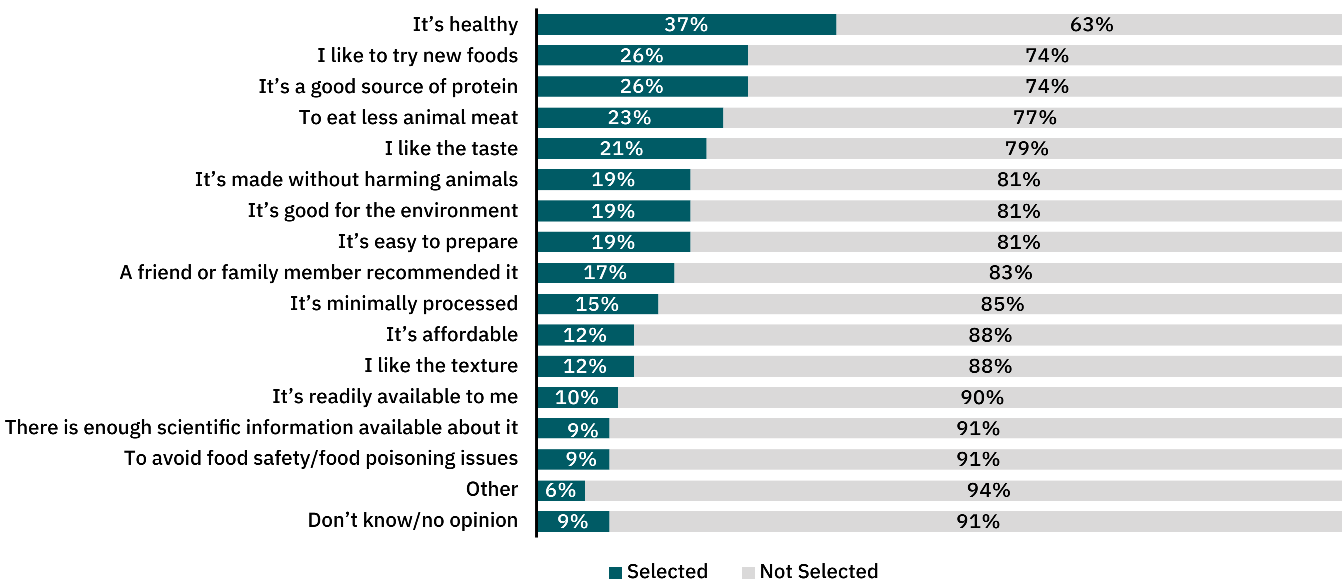
Motivations to purchase

Motivators of in-store purchases, particularly food, can vary significantly depending on the consumer and the surrounding context. Broadly speaking, however, factors like taste and price weigh heavily on decisions at the shelf. For plant-based meat, this reigns true as taste and price are often cited as the leading barriers to consumption, as will be covered in the next section.

Health perceptions are often cited as the primary motivator for people swapping out conventional meat in favor of plant-based meat. Based on an August 2023 survey conducted by Morning Consult on behalf of GFI, among U.S. adults who have tried plant-based meat more than once, the most selected reasons for consuming these products were:[2]

Why do you consume plant-based meat products? Select up to five reasons.

Among adults who have tried more than once (n=896)



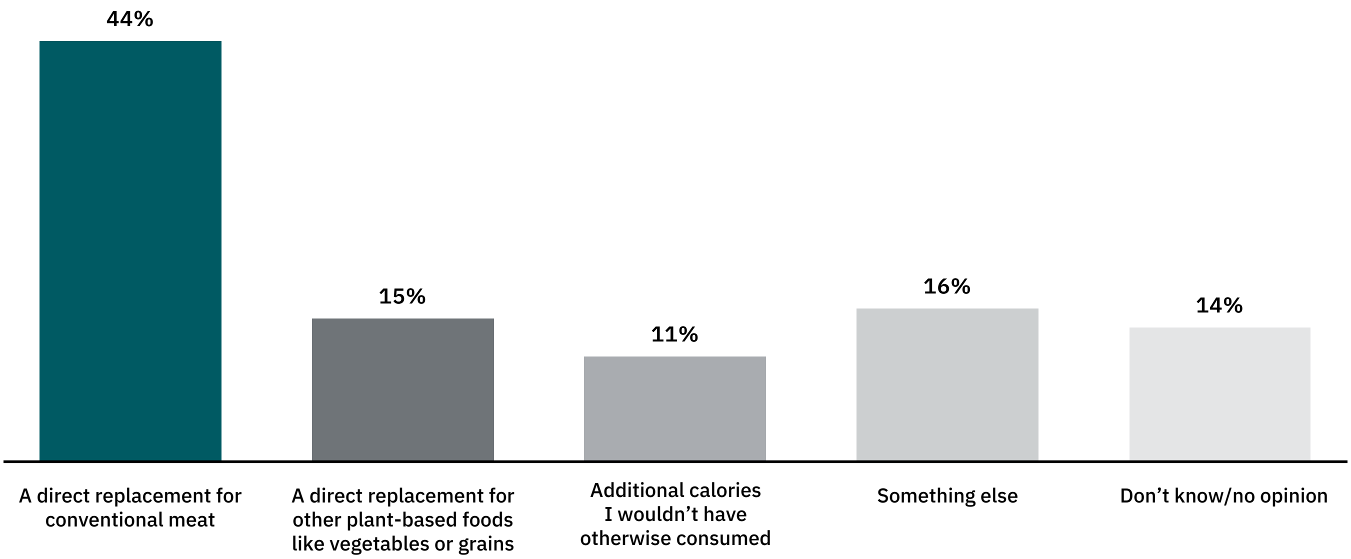
Health is a major aspirational quality of food behaviors—the majority of adults (75 percent) say it's at least somewhat important that the food they buy is healthy.[2]

Health is an important consideration for those purchasing plant-based meat (and food products in general), but to compete at the shelf, research has demonstrated that products need to first deliver on the fundamental characteristics of taste and price.

Indeed, mainstream shoppers are already looking for plant-based meat alternatives to serve as direct substitutes for their conventional meat purchases. Nearly half (44 percent) of adults who have tried plant-based meat more than once and also consume conventional meat products say that when they eat plant-based meat products, they are typically a direct replacement for conventional meat.[2]

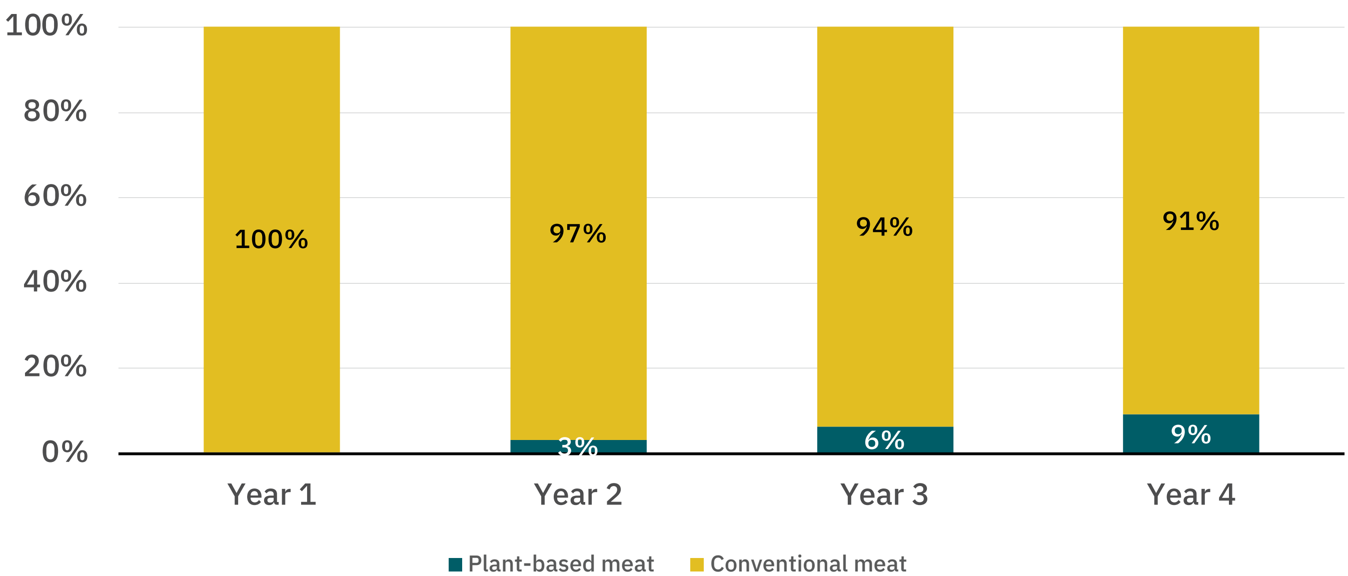
When I eat plant-based meat products they are typically...

Among adults who are not vegan, vegetarian, or pescetarian and have tried plant-based meat more than once (n = 792)



From the GFI/NielsenIQ migration study, for the group of households who went from only buying conventional meat to buying both conventional and plant-based by year four (nine percent of total households), the portion of their total meat purchases spent on plant-based meat increased from zero percent in year one to nine percent by year four.[1] This accounted for roughly $300 million in increased spending on meat alternatives for these households, bringing them to account for 27 percent of all plant-based meat spending across all households in year four.[1]

Plant-based vs. conventional meat spend of households who purchased only conventional meat in year one and both plant-based meat and conventional meat in year four



Additionally, in households who bought both plant-based and conventional in all four years (seven percent of total households), the share of their meat purchases coming from plant-based grew from 24 percent in year one to 27 percent in year four.[1]

It appears that households entering, and especially those staying in the plant-based category, are diverting a significant amount of their meat purchases to the plant-based category. Once engaged, the data indicates that these households also are likely to experiment amongst plant-based meat segments. This is an encouraging sign that growth opportunities still exist through further engaging these active consumers.

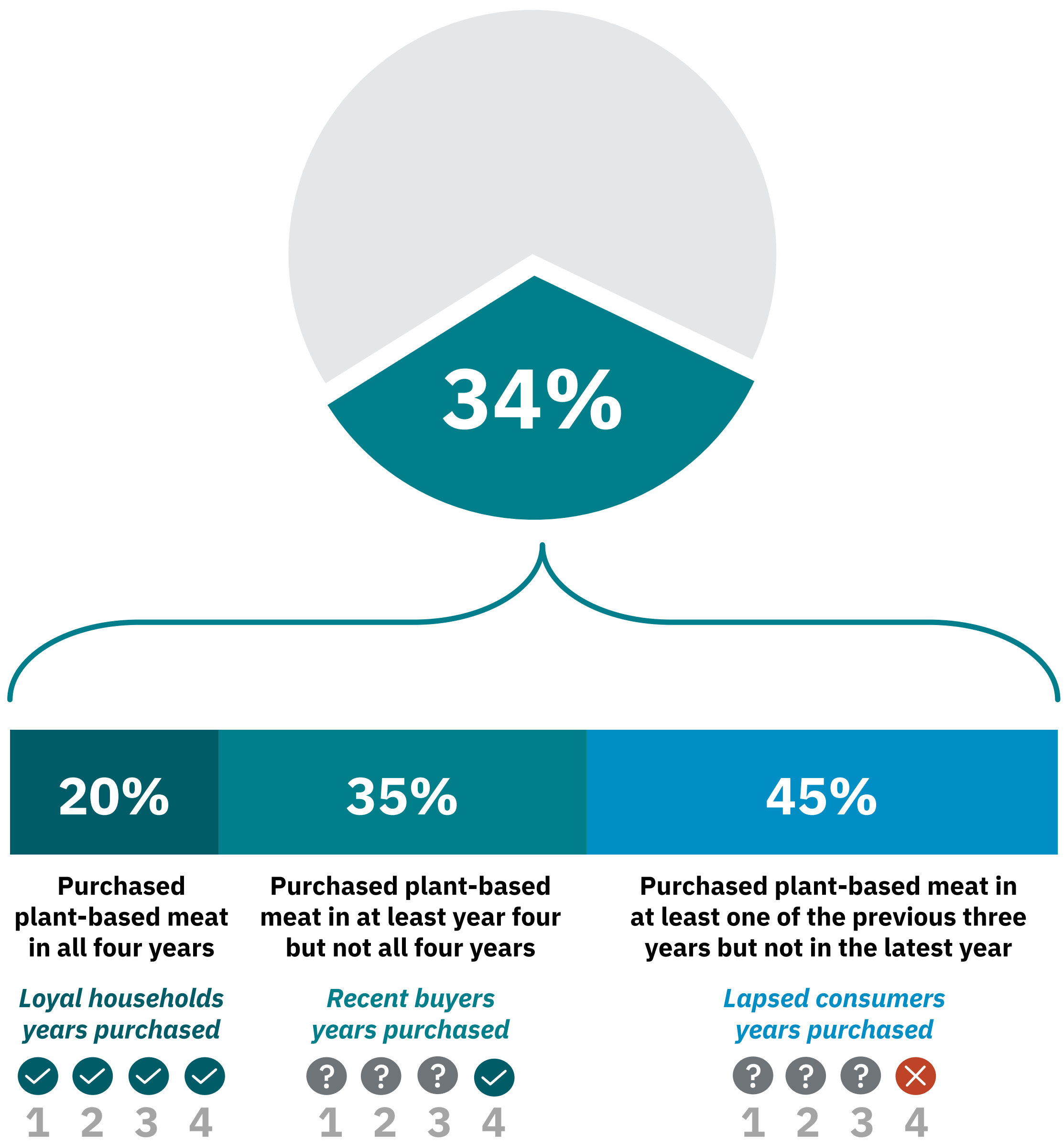
Meanwhile, in terms of consumer perceptions of the conventional meat category and thus potential value propositions for plant-based meat, there are certain messages that could be tapped. Consumers report that their leading concerns that influence whether or not they purchase conventional meat are its high cost, the treatment of animals, the overuse of antibiotics, and the risk of contamination leading to food poisoning or illness.[2]

Barriers to purchase

Roughly 20 percent of households purchased plant-based meat in 2022—which means 80 percent did not, representing a large consumer opportunity for the category.[1] From 2023 SPINS data, this figure fell from 19 percent in 2022 to 15 percent in 2023. Notably, roughly 50 percent of consumers are either not familiar or not too familiar with plant-based meat. Four in 10 state that they have never tried the products and among those who have, 55 percent have tried them just a few times or only once.[2] This represents a massive, untapped market for these products in the United States.

At the household level, the majority of U.S. households (66 percent) did not purchase plant-based meat in any of the four years (2019–2022) analyzed.[1] Among the ones who did, 20 percent did so every year, 35 percent did so at least in year four, and 45 percent did in at least one of the first three years but not the last.[1]

A third of U.S. meat-purchasing households have purchased plant-based meat in the four years studied...



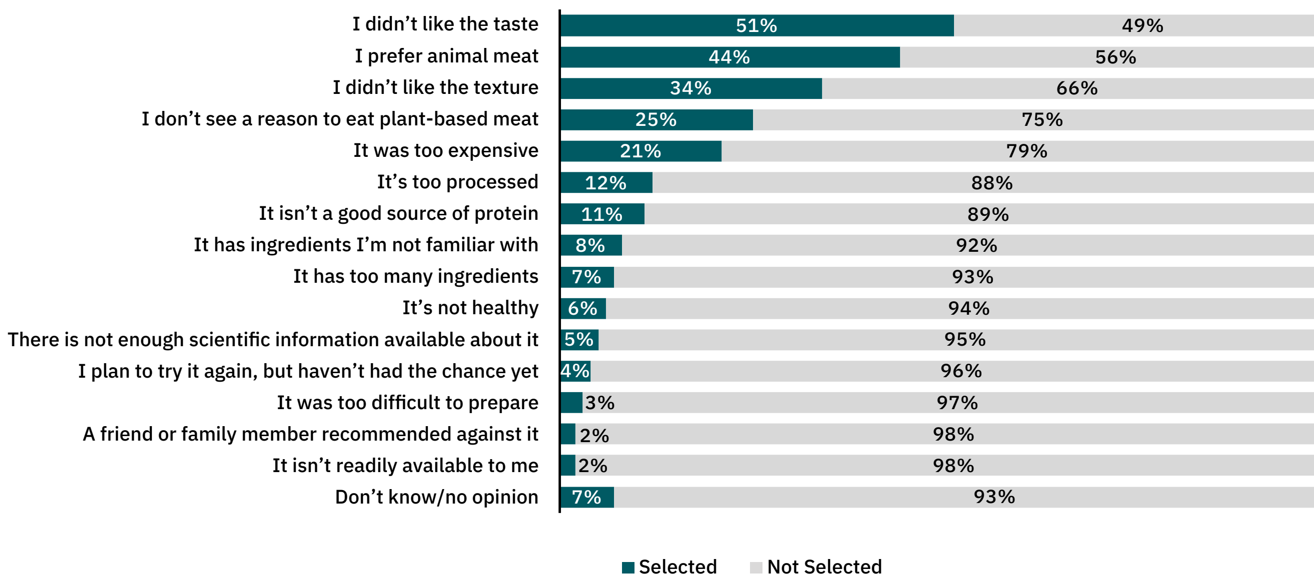
Trial, repeat purchases, and even familiarity with plant-based meat are relatively low. So why are relatively few consumers entering and staying in the category?

Key concerns or experiences around taste, texture, value, and price appear to be the leading roadblocks.

Among consumers who have tried plant-based meat just one time, the leading reasons for not returning were:[2]

Why have you not tried plant-based meat products again?

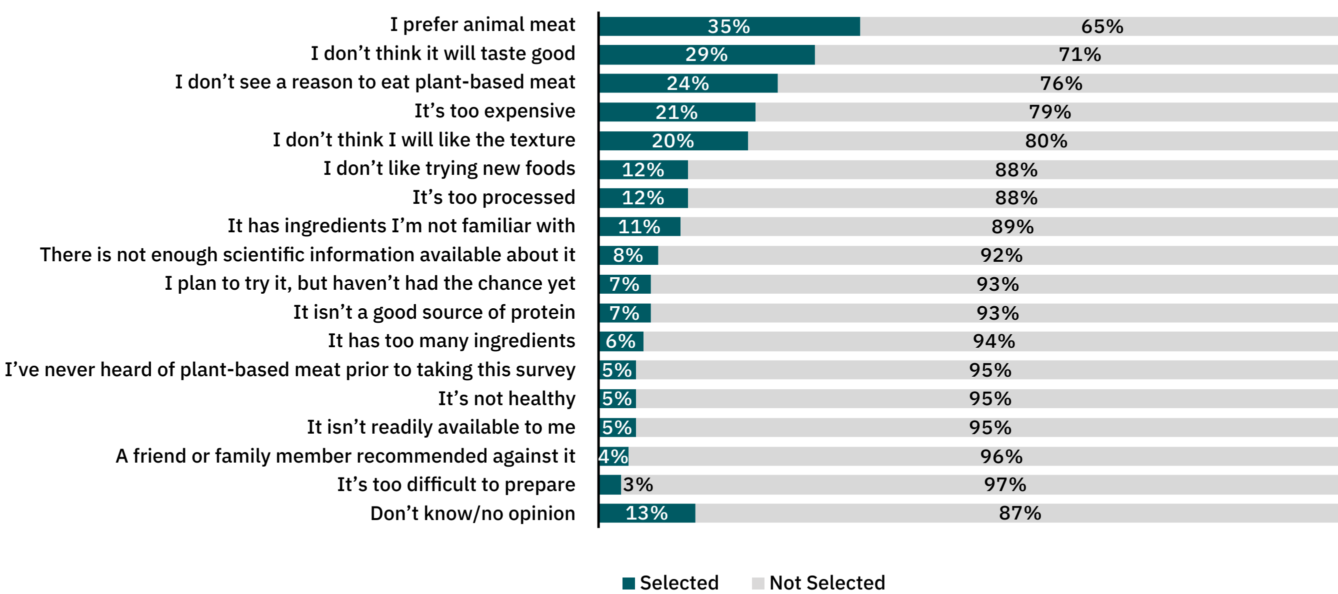
Among adults who have tried just once (n=280)



For those who haven't tried plant-based meat, the leading reasons were:[2]

Why have you never tried plant-based meat products?

Among adults who have never tried (n=872)



While interest in the category is strong, these reasons suggest that continued innovations in product taste and texture will be needed to appeal to consumers who expect these products to match their expectations for conventional meat. Beyond those product levers, industry players can continue to hone messaging and product development to establish a compelling overall value proposition that attracts consumers and keeps them coming back. In parallel, retailers and brands can look to continue relationships with highly engaged consumers, deepen engagement with moderately engaged ones, and build awareness among the many consumers still unaware of these products.

Key opportunities

The level of purchase frequency in the plant-based meat category varies across consumer groups. The below highlights areas of opportunity across all levels but additional research is needed to better understand the nuances of each, the relative size of the opportunity of further engaging each group, and effective strategies for doing so.

Continue to engage the core consumer

As covered throughout this paper, a relatively small group of consumers (seven percent of meat-purchasing households) make up the vast majority of plant-based meat dollar sales (82 percent).[1] Continuing to prioritize this segment and meet their needs will be key to sustained business performance and could unlock meaningful growth. Strategies to keep these consumers engaged might include optimizing store assortment and location to meet their needs or prioritizing product innovation within the category to encourage plant-based meat purchases on more occasions.

Spotlight: Plant-based milk

The plant-based meat market today is, in several ways, reminiscent of the plant-based milk market when it was in its early stages. Moving plant-based milk to the refrigerated milk set a decade ago was key to introducing the mainstream consumer base to the plant-based milk category. This change contributed to the dramatic increase in the portion of U.S. households buying plant-based milk (now 44 percent). Plant-based milk today accounts for 15 percent of all dollar sales for retail milk. With continued product innovation and consumer adoption, the plant-based meat category could have the potential to earn a similar dollar share of the total meat market. That opportunity represents a 14-point growth in plant-based meat's dollar share of total meat and is worth $18 billion.

Driving loyalty and engagement among middle-of-the-road purchasers

Morning Consult's August 2023 survey revealed that 21 percent of adults are very or extremely likely to purchase plant-based meat (loyal) while another 23 percent are somewhat likely to do so.[2] This 23 percent represents a sizable group of consumers who are open to plant-based meat but aren't fully engaged. As identified in the Nielsen Migration analysis earlier, this is the group who likely makes up the remaining 18 percent of plant-based meat dollar sales (in contrast to the loyalists above who make up 82 percent of sales).[1] Although representing more than two-thirds of plant-based meat purchasing households, this cohort has one foot in and one foot out on plant-based meat.

Meeting and exceeding these consumers' expectations when it comes to product performance will be critical to turning infrequent purchases into everyday staples. As Mintel reports, taste and price are the leading reasons why lapsed consumers don't purchase plant-based meat alternatives. One strategy that might entice this group is pursuing private-label offerings to deliver on value.

Expand reach, awareness, and trial to the broader consumer base

Plant-based meat as a category remains relatively nascent. Half of U.S. adults are not at all or not too familiar with plant-based meat and four in 10 state that they have never tried the products.[2]

Getting plant-based meat on the plates of these consumers will be crucial to unlocking widespread appeal of these products, as adults who have tried plant-based meat are nearly three times more likely to say they have a favorable impression of plant-based meat compared to those who have not.[2] Similarly, those who have tried plant-based meat are three times more likely to say they are extremely or very likely to purchase these products.[2]

Plant-based meat clearly has a proposition—strengthening that proposition to ensure it can appeal to meat-eaters and laying it out for consumers in messaging and marketing will be key to unlocking broader consumer uptake. Finally, those who are unlikely to purchase cite their preference for animal-based meat and lack of familiarity with plant-based meat as their reasoning. Familiarity could play a foundational role in attracting these consumers to the plant-based meat category, through offering products that look, cook, taste, and function like conventional meat. This underscores the important role trial can play in the minds of consumers. A 2019 study GFI commissioned from Mindlab found that familiarity was a key driver of purchase intent for consumers. This was even more so the case for meat-eating consumers, who much preferred products that looked comparable to their conventional meat or dairy counterparts and familiar language that incorporated meat terms.

Fundamentally, it is crucial to remember that for consumers to not only try, but also re-buy plant-based meat, the products must deliver on the core driver—taste.

Conclusion

The plant-based meat category has successfully captured the intrigue and enthusiasm of a meaningful segment of the market. This should not be overlooked. In 2022, one in five households were buying plant-based meat. A third of these households chose to make a third of their meat purchases plant-based.[1] The category was worth $1.24 billion in sales in U.S. retail in 2023. Each year, availability is expanding and new and improved products are continuing to hit the shelves. In a country where almost all households buy conventional meat, this is meaningful early progress toward transforming the protein category.

However, the plant-based meat category remains small and for it to level up against a $100 billion+ conventional meat sector, a broader group of consumers must be reached and retained. A 2023 study found that 12 percent of consumers account for more than half of beef consumption in the United States. Reaching and appealing to meat-eaters is where product innovation, increased scale and distribution, and continued investment will play a critical role in delivering products to all consumers that meet and or exceed their expectations on taste, price, health, and other key purchase motivators.

Retail is an immensely important channel for U.S. shoppers and their food experience and, in turn, a critical point of performance for plant-based meat. For manufacturers, it is an opportunity to place their products in the everyday routines of consumers, and for retailers, a chance to meet the shifting needs and interests of their shoppers. Plant-based meat has proven to be a category that is ripe with innovation and poised for the potential of deeper consumer engagement.

Sources and methodology

The main sources for findings in this paper are two research studies commissioned by GFI, described below. Additional supplementary GFI-led and 3rd-party research is cited throughout.

1. **Migration study:** This study, which GFI commissioned from NielsenIQ, analyzed purchase behavior of meat-purchasing households in the United States. over the four full years ending in September 2022. To better understand shopping behavior, households were broken into three groups:
   1) those buying only conventional meat,
   2) those buying both conventional and plant-based meat, and 3) those buying only plant-based meat. For the purposes of this study, plant-based meat includes items like frozen and refrigerated plant-based beef, chicken, and pork as well as tofu. Conventional meat purchases include only packaged meat items and not random weight counter meat sales.

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2. **Consumer survey:** On behalf of GFI, Morning Consult conducted a nationally representative poll of 2,210 U.S. adults in August 2023. The poll was conducted online and the data were weighted to approximate a target sample of adults based on age, race/ethnicity, gender, educational attainment, and region. Results from the full survey have a margin of error of plus or minus two percentage points.