Insights and opportunities in whole-cut meat alternatives

Category overview and insights for steaks, filets, chicken breasts, and other whole-cut products

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Executive summary

The alternative protein industry has experienced rapid growth over the past decade, and it's now common to see plant-based burgers on menus or plant-based nuggets in school cafeterias. Yet a key product format remains underrepresented: whole-cut meat alternatives like steaks, filets, and chicken breasts.

Whole cuts are among the most popular meat products. In a survey of U.S. consumers aged 18-59, among those who had eaten conventional meat in the past year, nearly seventy percent self-reported "regularly" eating whole-cut meat like steaks, chicken breast and thighs, filets of salmon, and pork chops. By contrast, around fifty percent of participants said they regularly eat ground meats, deli slices, sausages, patties, or nuggets and tenders (see Figure 3).

American meat consumption relies heavily on whole cuts like steak and chicken breast—but this category is almost entirely unaddressed by plant-based and fermentation-enabled meat.

As plant-based ground meat, patties, and nuggets have proliferated, some products are getting closer to or already matching consumers' taste and texture expectations when compared to their animal-based counterparts. Omnivores can easily use these plant-based products in familiar dishes and situations, from grilling burgers at a barbecue to serving a plate of chicken nuggets to their children. Few products on the market enable omnivores to make similar plant-based swaps for whole-cut meats.

Additional investments and innovations enabling plant-based and fermentation-enabled whole cuts to compete with conventional whole cuts on taste, texture, functionality, and price can open new opportunities for alternative protein companies to engage consumers by more fully addressing their preferences and needs.

This whitepaper outlines the state of the whole-cut meat alternative category and its accompanying opportunities, including growth trends and category dynamics in U.S. retail, relevant technology applications, recent category developments, consumer insights, and the competitive landscape.

Key takeaways

- According to SPINS, plant-based whole-cut categories represent between one and five percent of plant-based meat dollar and unit sales in U.S. retail. Conventional beef steaks, by comparison, comprised 37 percent and 24 percent of U.S. retail beef dollar and pound sales in 2024, indicating significant potential for plant-based whole-cut categories to gain market share (see Figures 1 and 2).
- According to SPINS, plant-based whole-cut categories saw dollar and unit sales growth in recent years, driven largely by notable distribution gains (see Table 3).
- Recent advances in texturization are supporting progress in whole-cut meat alternatives. While the nascency of some of these technologies means they may be further from commercial scale, they hold significant medium-to-long-term upside.

Market overview

Growth trends and category dynamics for plant-based whole cuts in U.S. retail

U.S. market size and evolution

U.S. retail

According to SPINS, plant-based beef and chicken comprise the majority of plant-based meat retail sales in the U.S. Plant-based beef represented just over a third of plant-based meat dollar and unit sales in U.S. retail in 2024, and plant-based chicken represented about a fourth. Formats like grounds, patties, and nuggets dominate these categories.

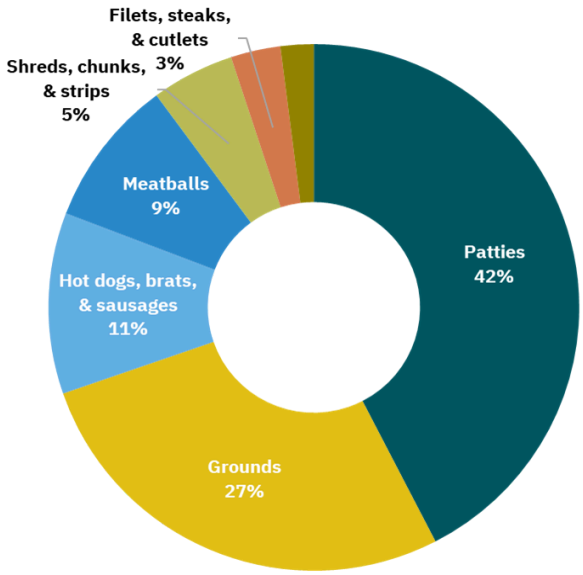
Whole-muscle products like plant-based beef shreds, chunks, and strips made up just two percent of plant-based meat dollar sales and unit sales in U.S. retail in 2024. Plant-based beef filets, steaks, and cutlets trailed behind at a mere one percent.

This pattern also appears in plant-based chicken retail sales. At five percent of plant-based meat dollar and unit sales, plant-based chicken shreds, chunks, and strips took up a slightly higher share of U.S. retail in 2024 compared to the same formats in plant-based beef. Plant-based chicken filets, steaks, and cutlets represented just one percent of U.S. retail plant-based meat dollar sales and unit sales in 2024.

There is a significant opportunity for growth in plant-based whole-cut (e.g., filets, steaks, and cutlets) and whole-muscle formats (e.g., shreds, chunks, and strips) in both the plant-based beef and chicken markets:

- In plant-based beef, if these emerging categories grew to the size of the patty market, that would represent growth of approximately $169 million and $160 million, respectively.
- In plant-based chicken, if these emerging categories grew to the size of the nuggets, tenders, and wings market (the largest plant-based chicken product format), that would represent growth of approximately $152 million and $106 million, respectively.

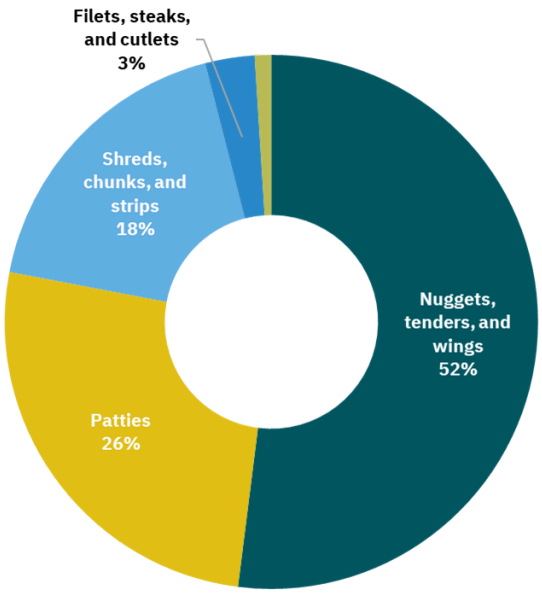
Figure 1: Plant-based beef dollar share by format in U.S. retail, 2024



Sales data note: The data presented in this graph is based on custom GFI and PBFA plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024.

Figure 2: Plant-based chicken dollar share by format in U.S. retail, 2024



Sales data note: The data presented in this graph is based on custom GFI and PBFA plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024.

Format growth and sustainability

According to SPINS, whole-cut and whole-muscle plant-based products saw dollar and unit growth in U.S. retail in 2024. From 2022 to 2024, the dollar sales in the plant-based whole cut format grew at a compound annual growth rate (CAGR) of +17 percent, largely driven by plant-based beef (+170 percent) and chicken (+11 percent). Meanwhile, the dollar sales in the plant-based whole-muscle piece format grew at a CAGR of nine percent, largely driven by plant-based beef (+116 percent), pork (+52 percent), and seafood (+31 percent) (see Tables 1 and 2).

In the conventional multi-outlet channel (MULO), where roughly 90 percent of U.S. retail plant-based meat dollar sales occur, increased distribution primarily drives this growth (see Table 3). Total revenue and revenue per unit are also outpacing volume growth, likely due to price increases and a shift in product mix as the brand composition of the category has evolved in recent years—including more premium-priced entrants.

Distribution gains often occur when new products or brands launch in retail, meaning there are limits to distribution-based growth. While expanded product availability is a powerful growth lever—particularly early in category development—incremental gains from new distribution shrink as more viable distribution points are covered. To understand growth dynamics, looking at velocity (how effectively products are turning on the shelf) is critical. Unit velocity for both whole-cut and whole-muscle plant-based products declined from 2022 to 2024—alongside growth in dollar sales, unit sales, dollar velocity, and distribution—which may mean demand per item is not keeping pace with the overall growth in product placements and variety.

Table 1: U.S. retail sales for plant-based filets, steaks, and cutlets

	2022	2023	2024	2-year CAGR
Beef	$1.8MM	$7.1MM	$13.0MM	+170%
Chicken	$7.3MM	$8.7MM	$8.9MM	+11%
Seafood	$10.4MM	$8.6MM	$7.1MM	-17%
Turkey	$3.5MM	$2.5MM	$2.3MM	-19%
Filets, steaks, and cutlets	**$22.9MM**	**$26.9MM**	**$31.3MM**	**+17%**

Sales data note: The data presented in this graph is based on custom GFI and PBFA plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

Table 2: U.S. retail sales for plant-based shreds, chunks, and strips

	2022	2023	2024	2-year CAGR
Analog (unspecified)	$601K	$550K	$538K	-5%
Beef	$4.8MM	$18.4MM	$22.2MM	+116%
Chicken	$61.2MM	$57.4MM	$54.7MM	-5%
Plant-forward	$4.5MM	$2.8MM	$2.3MM	-28%
Pork	$2.8MM	$2.4MM	$6.4MM	+52%
Seafood	$1.4MM	$944K	$2.3MM	+31%
Shreds, chunks, and strips	**$75.1MM**	**$82.4MM**	**$89.1MM**	**+9%**

Sales data note: The data presented in this graph is based on custom GFI and PBFA plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

Table 3: U.S. retail statistics for plant-based whole cuts (MULO)

	2022	2023	2024	2-year CAGR
Filets, steaks, and cutlets	**$19.9MM**	**$21.7MM**	**$25.2MM**	**+13%**
Units	4.2MM	3.9MM	4.3MM	+1%
TDP growth	+10%	+2%	+13%	+6%
$/TDP growth	-1%	+14%	+13%	+6%
units/TDP growth	-15%	+6%	-10%	-5%
Shreds, chunks, and strips	**$62.5MM**	**$71.1MM**	**$78.2MM**	**+12%**
Units	12.4MM	12.3MM	13.0MM	+3%
TDP growth	+0%	+13%	+13%	+6%
$/TDP growth	+14%	-2%	+11%	+5%
units/TDP growth	-1%	-6%	-7%	-3%

Sales data note: The data presented in this graph is based on custom GFI and PBFA plant-based categories that were created by refining standard SPINS categories. Due to the custom nature of these categories, the presented data will not align with standard SPINS categories.

Source: MULO = SPINS Conventional Multi Outlet Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

Technology landscape

Texturization—creating desirable, three-dimensional structures from plant protein ingredients—enables meat and seafood alternatives to match the mouthfeel, appearance, and eating experience of conventional meat, particularly in whole-cut formats.

Extrusion is the most established and scalable texturization technique in the plant-based meat industry, but most extrusion applications are primarily used for restructured meat products like grounds, nuggets, and patties. There are several other production and texturization methods that companies and researchers are developing to achieve more desirable whole-cut meat alternatives that more closely produce an experience like conventional meat. These methods provide advantages like energy efficiency, customization, and the ability to create more realistic textures with fat and protein layers, as well as thicker, steak-like products. However, some of these innovative methods are currently slow, expensive, and not yet suitable for commercial-scale food production.

While the nascency of some of these technologies means they may be further from commercial scale, they also hold significant medium-to-long-term upside. See Table 4 for a detailed overview of various production and texturization methods for whole-cut meat alternatives, including technological maturity, advantages, disadvantages, and suitable applications.

Table 4: Production and texturization methods for whole-cut plant-based and fermentation-enabled meat

	Technological maturity	Advantages	Challenges	Suitable applications
Extrusion (high moisture/ low moisture)	• High • Large commercial scale	• Established technology • High throughput • Infrastructure and equipment already exist	• Capital-intensive equipment • Requires skilled operators • Homogeneous composition • Doesn't tolerate fat well	• Minced/ground products such as burgers or fish sticks (low moisture) • Thin strips of homogeneous product (high moisture)
Shear cell technology	• Medium • Pilot scale	• Lower energy requirements than extrusion • Creates thicker tissues	• Still in development for translation to commercial scale • Historically a batch process with continuous processes emerging	• Thicker sheets of homogeneous product • Filets of whitefish and meats with little structural striation
3D printing	• Medium • Small commercial scale	• Precise control over patterning and textures • Highly tunable properties	• Currently small-scale and expensive • 3D printing for food applications can be more difficult than other industrial applications (e.g., plastics)	• Products where heterogeneous textures are critical (e.g., layers of fat and protein in a steak) • Developing scaffolds for hybrid plant-based / cultivated products
Fiber spinning	• Low • Pilot scale	• Produces mats or bundles of fibers at scales that resemble muscle fibers	• Currently small scale and expensive • Fiber spinning for food applications can be more difficult than other industrial applications (e.g., textiles, polymers) • Likely needs to be combined with other methods	• Developing scaffolds for hybrid plant-based / cultivated products • Adding longer fiber integrity for larger whole cuts
Freeze structuring / alignment	• High • Large commercial scale	• Produces aligned fibrous textures similar to muscle • Replicable at scale • Minimal post-processing	• Structure may be brittle • May lack versatility for other formats • Often formulated with egg-white protein (vegetarian formulation)	• Meat analogs like chicken-style filets and nuggets • Whole-cut formats with aligned fibers or striations

Molding of mycelium	• Medium • Pilot scale	• Efficient at forming whole-cut structures • Enables shape control without heavy processing • Maintains natural mycelial fiber alignment	• May face scale-up challenges • Consistency of internal textures may vary	• Whole-cut products like steaks and cutlets • Formats where fiber orientation is less critical
Solid-state fermentation with biomats	• Medium • Pilot scale	• Unique mat-like growth enables sheet formation • Minimal processing required • High protein yields	• Texture may not mimic meat fibers closely • Limited versatility in final shapes • Upstream process may be difficult to scale	• Foldable or sheet-based formats • Jerky-style or processed meats • Functional protein ingredients
Solid-state fermentation *(aligned mycelium sheets)*	• Medium • Pilot scale	• Naturally aligned mycelial fibers • Minimal processing • High-quality fibrous texture • Clean label	• Long fermentation cycles • Scalability depends on bioreactor footprint	• Bacon-style slices • Flat or layered meat analogs with muscle-like texture

For more information on plant-based meat texturization, check out GFI's deep dive on plant-based meat end-product formulation and manufacturing.

Recent developments

Plant-based whole cuts

From startups to large plant-based meat players, product development in whole-cut and whole-muscle formats has been accelerating in recent years. In 2025, **Impossible Foods** launched their first plant-based steak product, and **Beyond Meat** plans to release a whole-muscle steak using fava beans and mycelium to add to their existing steak tip offerings. In 2023, the Slovenian company **Juicy Marbles** unveiled the first plant-based rib with edible bones, and Israeli startup **Chunk Foods** launched their whole cut plant-based steak at **Charley's Steak House** in Orlando, Florida—the first time a steakhouse chain featured a plant-based steak option in the U.S.

New facilities and partnerships have propelled this growth, including France's first commercial-scale facility for plant-based whole cuts, opened by **SWAP Food**, formerly known as **Umiami**. The construction of this facility enabled SWAP to partner with Spain's **Heura Foods** to create a whole-cut plant-based chicken filet, expanding Heura's range from chunks and breaded chicken and propelling SWAP into mass retail. Plus, **Better Balance**, owned by the large international food company **Sigma Alimentos**, entered a product development agreement with **Chunk Foods** to develop plant-based whole cuts for the Latin American market.

Recent advances in shear cell texturization support progress in whole-cut and whole-muscle formats. For example, the foodtech company **Clextral** developed technology for larger, softer, more

fibrous plant-based meats and fish by combining shear cell fibrillation and continuous extrusion. The resulting softer structures enable the production of a wider range of whole cuts, such as steaks and filets. **Rival Foods**, a company spun out of Wageningen University, is also implementing shear cell technology to construct whole-muscle cuts, and **Dutch Structuring Technologies** announced a continuous shear cell process that reduces both the need for additives and the number of post-processing steps.

Simulate developed their chicken breast using fiber spinning, and **Project Eaden** debuted innovative spinning technology to produce whole-cut pork and beef products. The plant-based seafood manufacturer **New School Foods** produces their whole-cut salmon using a proprietary cold-processing technique.

Developments in 3D printing for plant-based whole cuts are also accelerating production scale up. **Cocuus** announced plans to produce 1,000 tons of 3D-printed bacon annually. **Steakholder Foods** formed at least three partnerships centered around producing products using Steakholder's 3D printing technology, including agreements focusing on plant-based beef, fish, and regional cuisines. **Redefine Meat** significantly broadened distribution, with launches across EU retail and over 1,000 UK foodservice locations. **Novameat** secured $19 million in funding to further develop innovative cold plasma treatments that enhance 3D printing capabilities for pea protein-based products.

In recent years, public investment fueled technological advancements in whole-cut and whole-muscle plant-based meat. In the United States, **Tender Foods** received National Science Foundation funds to develop whole cuts of plant-based meat enhanced by cultivated animal cells. Plus, two seed funds financed by the French government led a funding round to support **SWAP Food** in launching their whole-cut plant-based products in the United States.

Fermentation-enabled whole cuts

In addition to plant-based production methods, fermentation is a powerful, flexible process for using microorganisms to produce alternative proteins — including whole cuts. Recent advancements in fermentation technology and production capacity have enabled progress in whole-cut meat alternatives.

In the United States, the startup **Aqua Cultured Foods** has tapped the biotech company **Ginkgo Bioworks** to refine the production of their fermentation-derived, whole-cut seafood to create whole-muscle seafood alternatives that more closely match conventional products. **Aqua Cultured Foods** and **Swap Foods** have, separately, begun to forge relationships with Chicago restaurants to get their whole-cut plant-based seafood and chicken in front of diners.

Chunk Foods, which uses fermentation to create their whole-cut plant-based meat products, opened a new facility in Israel that can manufacture millions of steaks annually. The increased production capacity allowed them to launch in U.S. retail, marking the company's first direct-to-consumer availability. **Revo Foods** opened a facility capable of producing up to 60 tons per month of 3D-printed food, and the facility's first product was a whole-cut mycelium salmon filet.

The fermentation processes used to create whole-cut beef products (like Chunk Foods') may be further from the commercial scale because of their novelty but also hold significant upside potential over the medium term. Learn more about the different types of fermentation processes used to produce meat alternatives, including whole-cut and whole-muscle formats, in our State of the Industry Report: Fermentation.

Consumer insights and the competitive landscape

Taste and texture continue to be among the most persuasive factors that drive consumer choice regarding conventional meats and meat alternatives, particularly in whole-cut formats.

NECTAR's Taste of the Industry report names taste dissatisfaction as a leading reason why many consumers who have tried plant-based meat aren't coming back for seconds. The analysis synthesizes key findings from blind taste tests in which participants compared plant-based meat against their conventional counterparts.

They found that the leading plant-based steak product significantly underperforms the benchmark animal-based product in overall consumer satisfaction. For plant-based steak products, opportunities are especially pronounced for similarity to conventional steak in taste, texture, and appearance.

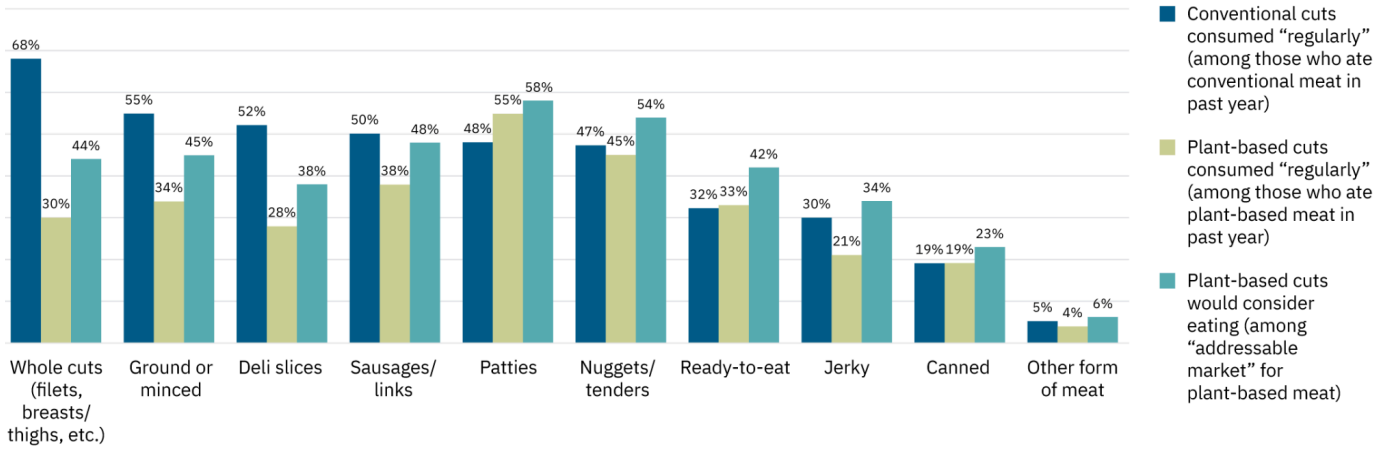
Notably, however, participants rated their overall satisfaction with the leading unbreaded, plant-based chicken breast the same as the benchmark conventional product. Still, the average unbreaded, plant-based chicken breast has an opportunity to more closely approximate conventional chicken breast in terms of taste, texture, price, and perceived nutrition.

NECTAR's research estimates that categories of plant-based meat with the highest average sensory satisfaction [e.g., plant-based chicken] capture five to 15 times more market share than lower-scoring plant-based categories." Plus, within categories, products with higher average sensory satisfaction are estimated to capture greater market share than their competitors, demonstrating that progress in taste and texture can significantly impact consumer behavior.

The gap in consumers' overall liking of animal-based whole cuts and whole-cut meat alternatives largely mirrors the gap between consumers' self-reported whole-cut conventional and plant-based meat consumption. Consumers choose conventional whole cuts far more often than plant-based alternatives: Among consumers aged 18-59 who ate conventional or plant-based meat in the past year, 68 percent self-report "regularly" eating conventional whole cuts, whereas 30 percent self-report "regularly" eating plant-based whole cuts (see Figure 3).

Of the addressable market for plant-based meat—defined as consumers who are at least "somewhat likely" to eat plant-based meat and/or plant-based dairy in the future—44 percent of consumers said they would consider eating plant-based whole cuts. Though progress is needed in taste parity and consumer adoption of plant-based whole cuts, a variety of products are already established on the market. (see Tables 5 and 6).

Figure 3: Self-reported consumption of meat by format type and interest in equivalent plant-based formats, U.S.



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

Table 5: Top-selling plant-based filets, steaks, and cutlets in alphabetical order, U.S. retail 2024

Brand	Product name(s)
Gardein	• Fishless Filet • Turkey Cutlet With Gravy
Meati Foods	• Classic Mycelium Steaks • Classic Mycelium Cutlets • Crispy Mycelium Cutlets • Southwestern Style Mycelium Steaks
Nasoya	• Korean BBQ Plant-Based Steak • Plant-Based Gochujang Steak
Quorn	• Homestyle Meatless Chiqin Cutlets • Meatless & Soy-Free Naked Chik'n Cutlets

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

Table 6: Top-selling plant-based shreds, chunks, and strips in alphabetical order, U.S. retail 2024

Brand	Product name(s)
Abbot's	• Plant-Rich Chopped Chick'n
Beyond Meat	• Plant-Based Seared Tips
Daring	• Cajun Plant Chicken Pieces • Original Plant Chicken Pieces
Gardein	• Plant-Based Mandarin Orange Crispy Chick'n • Plant-Based Chick'n Strips • Ultimate Plant-Based Chick'n Strips
MorningStar Farms	• Chik'n Strips • Sweet BBQ Riblets
Tofurky	• Plant-based Chick'n Lightly Seasoned

Source: Total market = SPINS Natural Expanded Channel + SPINS Conventional Multi Outlet Channel + SPINS Convenience Channel (powered by Circana) | 52 Weeks Ending 12-1-2024

Outlook

The size of the conventional whole-cut meat market is significant; in U.S. retail, conventional chicken breast sales were around $9 billion in 2023, and conventional steak sales reached around $11 billion in 2024. Comparatively, the entire plant-based whole cut market amounted to just $120 million in 2024—about one percent of the size of the conventional chicken breast market.

The sheer scale of consumer engagement with conventional whole cuts means that even marginal growth in plant-based whole cuts' market share would represent significant increases in dollar and unit sales. Growth in plant-based whole cuts can introduce new occasions for consumers to choose plant-based meats, like throwing a fermentation-enabled steak on the grill to celebrate a birthday or adding plant-based chicken shreds to a weeknight curry. This kind of expansion could propel growth by helping plant-based meat address more consumer needs.

Notable multi-year category growth in plant-based whole cuts demonstrates that these emerging categories are already gaining traction with consumers. However, while both distribution and dollar velocity grew between 2022 and 2024, declining unit velocity poses a longer-term risk if higher prices drive away consumers.

GFI research found that almost half of U.S. consumers who are open to plant-based meat would consider eating plant-based whole cuts. This number might be even higher if there were more compelling product offerings and consumers had better familiarity. Because the category is still quite niche, many consumers may not have a clear concept of a plant-based whole cut. Interventions like increased marketing and consumer education can boost consumer awareness and demand for those unfamiliar with the category.

Additionally, plant-based brands have a unique opportunity to identify the products and categories most attractive to consumers and produce and position their whole-cut products accordingly. For example, producing and selling conventional filet mignon necessitates raising and marketing products from an entire beef cow. A plant-based brand, however, could prioritize only high-value cuts like filet mignon without also needing to produce lower-value products. This allows plant-based brands to be more nimble in their positioning and marketing.

Plant-based whole-cut production technologies need to achieve additional scale to facilitate future growth. Texturization innovations can offer improvements in creating meat alternatives that authentically recreate the experience of eating conventional meat. But with many production technologies not yet at commercial scale, technical and funding hurdles present challenges for companies hoping to achieve significant growth.

The potential market for plant-based and fermentation-enabled whole cuts is vast—but only if products can deliver the key attributes consumers have come to expect from conventional whole-cut products. If plant-based and fermentation-enabled steaks can achieve the rich flavor, juiciness, and texture consumers associate with steak, for example—indulgence with less saturated fat, cholesterol, and environmental impact—the category could attract new consumers and expand into new eating occasions to unlock a segment of the conventional meat market long underserved by alternative protein products.

References

1. The Good Food Institute, Survey of n=3000 U.S. consumers aged 18-59, May 2024.
2. Taste of the Industry, NECTAR, 2025
3. State of the Industry: Plant-based, Good Food Institute, 2023 and 2024
4. State of the Industry: Fermentation, Good Food Institute, 2023 and 2024

Additional resources

GFI grantees: Whole-cut technology

Powered by generous donors, our Research Grant Program funds open-access alternative protein research. The following researchers have been awarded grants from GFI to explore whole-cut technology for alternative proteins.

Dr. Birgit Dekkers
Dr. Vivian Fedderns
Dr. Leonie Johanna Jahn
Dr. Luciano Paulino Silva
Dr. Fabiana Perrechil Bonsanto
Dr. Lutz Grossman
Dr. Iftach Nachman
Dr. Frederico Ferreira

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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