



The rise of plant-based in U.S. foodservice

Sales data and consumer insights
for the plant-based meat category

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Introduction

Over the last half century, Americans have shifted a major portion of their food purchasing from grocery stores to restaurants. In 1960, the U.S. Department of Agriculture estimates that just two percent of food expenditures came from food away from home, a figure that grew rapidly to reach 56 percent by 2022.

Despite ebbs and flows in this trend over time due to major events such as the 2008 recession or, most noteworthy, the Covid-19 pandemic, the long-term trajectory appears to be one of sustained growth for the foodservice sector (Figure 1).

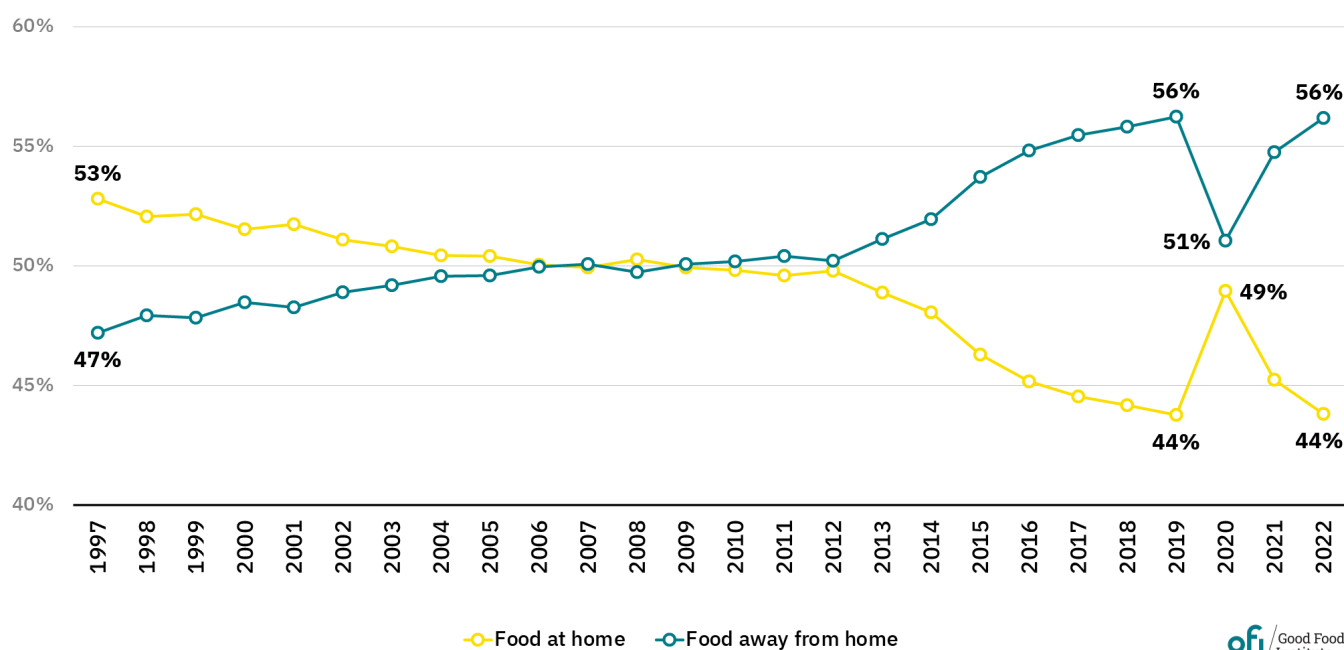


Figure 1: Percentages of U.S. nominal food expenditures at home versus away from home, 1997–2022

Source: USDA Food Expenditures Series - nominal food and alcohol expenditures, with taxes and tips, for all purchasers, 6/1/2023

Today's foodservice industry offers a wide—and still broadening—variety of food experiences that meet the ever-changing needs of consumers, from on-demand food delivery to counter service and food halls to full-scale sit-down restaurants. In Foodservice environments, consumers try new ingredients, taste new cuisines, and experience innovative food trends for the first time. In a space where taste and experience are often elevated and barriers like cost and health may play limited roles, foodservice offers ripe grounds for testing and proving out food innovations.

Plant-based proteins have been able to tap into this sector, earning their way onto menus across the country, including in many of the largest restaurant chains and in featured dishes from several celebrated chefs (Table 1). Compared to the animal-based meat market, plant-based proteins are a small, yet growing, niche. Still, many opportunities remain for plant-based foods to expand their presence and share of the U.S. foodservice market. Expanding and improving on variety, functionality, taste, and price will play a crucial role in solidifying plant-based proteins as menu staples and accelerating mainstream adoption.

Table 1: Notable plant-based meat launches and limited-time offers (LTOs) in major U.S. foodservice chains, 2022.

Restaurant	Menu item	Plant-based brand
Burger King	Impossible Chick'n Sandwich*	Impossible Foods
Chipotle	Plant-Based Chorizo*	Proprietary blend
Cracker Barrel	Impossible Sausage	Impossible Foods
Donatos	Field Roast™ Plant-Based Pepperoni	Field Roast
KFC	Beyond Fried Chicken*	Beyond Meat
McDonald's	McPlant	Beyond Meat
Panda Express	Beyond the Original Orange Chicken Beyond Beef*	Beyond Meat
Peet's Coffee	Mediterranean Flatbread Wrap Everything Plant-Based Sandwich	Beyond Meat Violife JUST Egg
Starbucks	Plant-Based Chicken Sausage and Pepper Sous-Vide Bite* Plant-Based Smoky Poblano & Black Bean Sous-Vide Bite* Plant-Based Chicken Sausage & Pepper Sandwich Mini*	JUST Egg Daring
Taco Bell	Beyond Carne Asada Steak* Crispy Melt Taco* Nachos Bellgrande*	Beyond Meat Proprietary blend
Wienerschnitzel	Field Roast Signature Stadium Dog	Field Roast

NOTE: Menu items with an * were LTOs.

The foodservice sector has been on a unique trajectory over the last four years due largely to the shifts in consumer purchases resulting from the Covid-19 pandemic. Inflation has also notably affected consumers, operators, and manufacturers. Given these market fluctuations, it is crucial to take a multisector perspective when analyzing the U.S. market for plant-based proteins. To gain insights into

the performance of plant-based proteins in U.S. foodservice, GFI commissioned Circana (formerly NPD & IRI) to provide sales and consumer data. In this report, we explore the key findings, provide insights into the current state of plant-based protein sales in foodservice, and highlight major growth opportunities in this channel that has earned more than half of U.S. shoppers' annual food spend.

Key findings:

- 1 **2022 was a strong year on the plant-based protein category's path back to pre-pandemic levels.** U.S. broadline distributor sales of plant-based proteins reached \$304 million in 2022, growing eight percent from pre-pandemic levels in 2019. Meanwhile, unit sales declined very slightly by one percent over the same period, in line with animal-based meat sales declines.
- 2 **This dollar-to-unit growth gap reflects price increases across the board.** The average price per pound of plant-based proteins grew nine percent from 2019 to 2022. Notably, this is significantly lower than price increases for animal-based meats, which grew 26 percent. Price increases will likely continue to play a significant role in driving consumer behavior across the foodservice sector.
- 3 **Analog plant-based proteins that aim to match the taste and texture of animal-based meat have the majority of the plant protein category.** In 2022, products including plant-based chicken, plant-based pork, and plant-based seafood emerged as small but mighty segments, demonstrating that operators are leaning into new product offerings beyond the traditional plant-based burger. Analog products made up 53 percent of pound sales in plant-based proteins in 2022, up from 39 percent in 2019.
- 4 **Roughly ten percent of U.S. consumers purchased plant-based meat alternatives at a foodservice location in 2022, and the vast majority did so just once.** This signals a large runway for the plant-based meat category to further expand in the foodservice sector if products can appeal to more consumers and earn greater loyalty.
- 5 **Buyers of plant-based meat make roughly 30 more trips to foodservice locations per year, spending approximately \$400 more than the average buyer, establishing them as very valuable customers.** With the continued development of the plant protein category in foodservice, brands and operators are poised to capitalize on high-value plant-based buyers and better meet customer needs.

A note on the data: Circana's SupplyTrack tool was used to track roughly 86 percent of all broadline distributor sales directly to operators, accounting for approximately 41 percent of total foodservice sales. GFI commissioned the data for the plant-based protein category and the animal-based meat category. It is important to note that broadline distributors typically cater to noncommercial operators (such as schools and universities, healthcare systems, workplaces, and more) and small- to medium-sized chains rather than large chains that often use specialty distributors or their own distribution networks. However, large chains are not totally absent from this dataset; chains that do leverage broadline distributors are captured. In addition, Circana's Checkout tool was leveraged to analyze the purchasing dynamics of buyers of plant-based meat in foodservice environments. This tool collects receipts uploaded by Circana's panelists, providing valuable insights into consumer behavior. Receipts are captured from over 550 foodservice chains bringing in consumer-level data regardless of whether the operator leverages broadline distributors or not. For more on the data methodology, reference the [About the data](#) section below.

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01 Sales

Total plant-based meat sales

A comprehensive understanding of the state of the plant-based meat industry requires a look at the full sales picture, including retail, foodservice, and e-commerce. Figure 2 shows unprecedented growth in plant-based meat retail and e-commerce sales at the beginning of the pandemic alongside a logical

decline in plant-based meat foodservice sales as the foodservice sector experienced a pause. Combining sectors helps smooth out individual channel volatility during and after peak pandemic shopping. Subsequent sections will dive deeper into foodservice sales over the last four years and discuss the role this segment has played in the broader evolution of the plant-based industry.

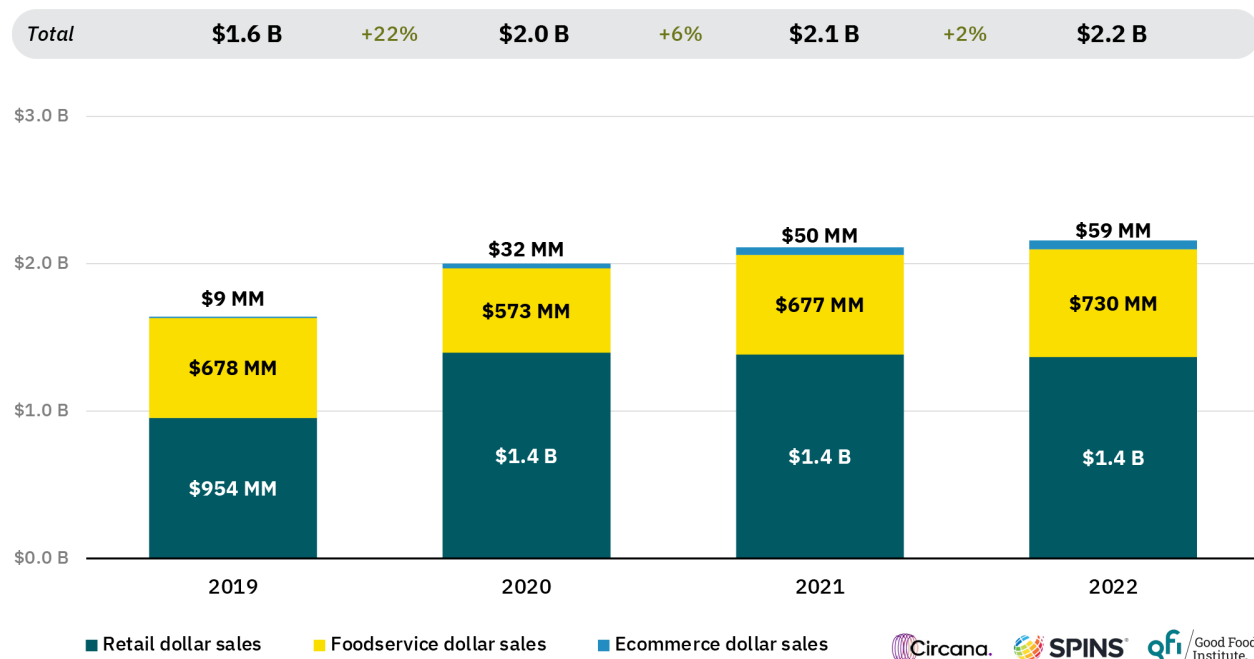


Figure 2: Estimated total U.S. plant-based meat dollar sales (retail, foodservice, e-commerce)

Source: Foodservice sales are extrapolated for the total U.S. foodservice market by multiplying Circana's 41 percent coverage estimate by a multiplier of 2.4 to reach an estimated 100 percent. Foodservice sales shown are at the wholesale, distributor to operator level, not point-of-sale. Retail and e-commerce sales are not multiplied by and do not necessarily represent 100 percent coverage. The retail 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: Retail - SPINS Natural Grocery Channel, SPINS Conventional Multi Outlet Channel (powered by Circana, formerly IRI & NPD) | 52 Weeks Ending 1/1/2023. Ecommerce - NPC, All Outlets 52 weeks ending 1/1/2023. Foodservice - Circana, formerly IRI & NPD/SupplyTrack, 12 ME Dec 2022.

Plant-based proteins and animal-based meat sales in foodservice

In the foodservice sector, plant-based protein sales have experienced volatility due to changes in consumer behavior during the pandemic. With consumers shifting purchases to retail and

e-commerce, plant-based protein pound sales in foodservice declined 20 percent from 2019 to 2020, similar to an 18 percent decline seen in animal-based meat pound sales (Figure 3).

Fast-forwarding to 2022, plant-based proteins are rebounding, with dollar sales surpassing 2019 levels and pound sales nearly meeting pre-pandemic levels.

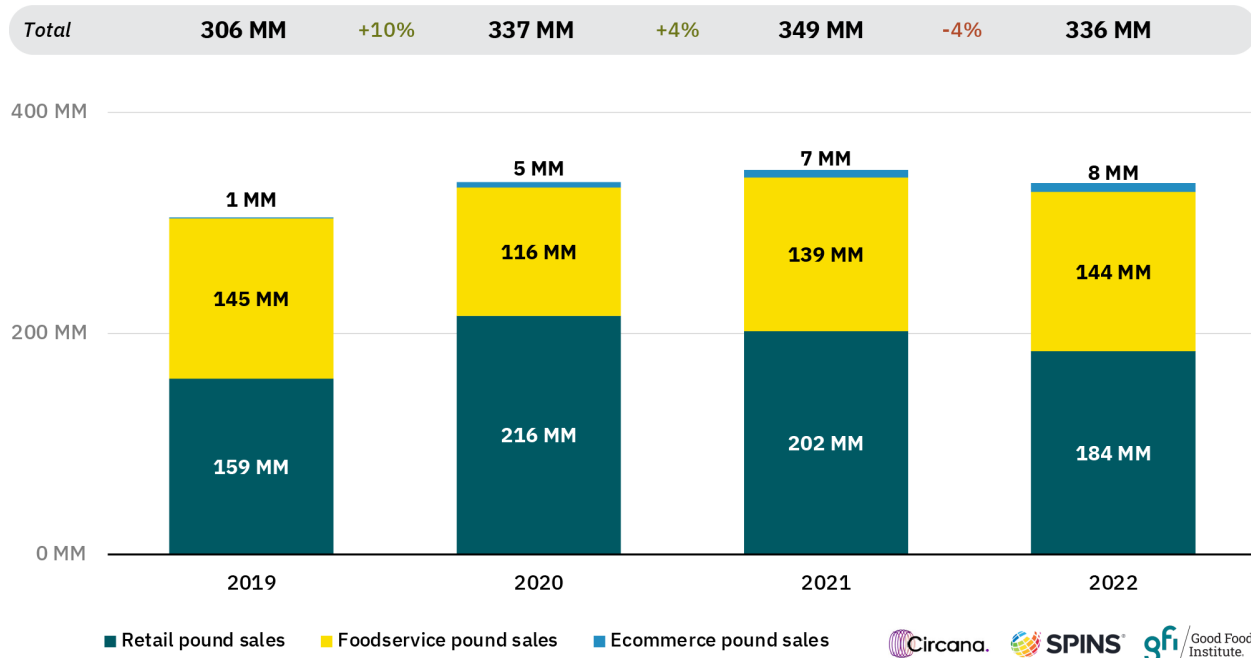


Figure 3: Estimated total U.S. plant-based meat pound sales (retail, foodservice, e-commerce)

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For more on the retail sales of plant-based foods in the U.S., visit [GFI's market research webpage](#).

Plant-based proteins are rebounding in U.S. foodservice after the height of the Covid-19 pandemic, with dollar sales surpassing 2019 levels and pound sales nearly meeting pre-pandemic levels.

Like plant-based proteins, animal-based meat pound sales decreased by one percent compared to 2019. However, animal-based meat dollar sales increased by 25 percent, significantly more than those of plant-based proteins (Figure 4). This gap between dollar and pound sales reflects major price increases in animal-based meat. Despite declining pound volume, higher prices have inflated dollar sales, particularly for animal-based meat where it appears costs were increasingly elevated compared to plant-based proteins.

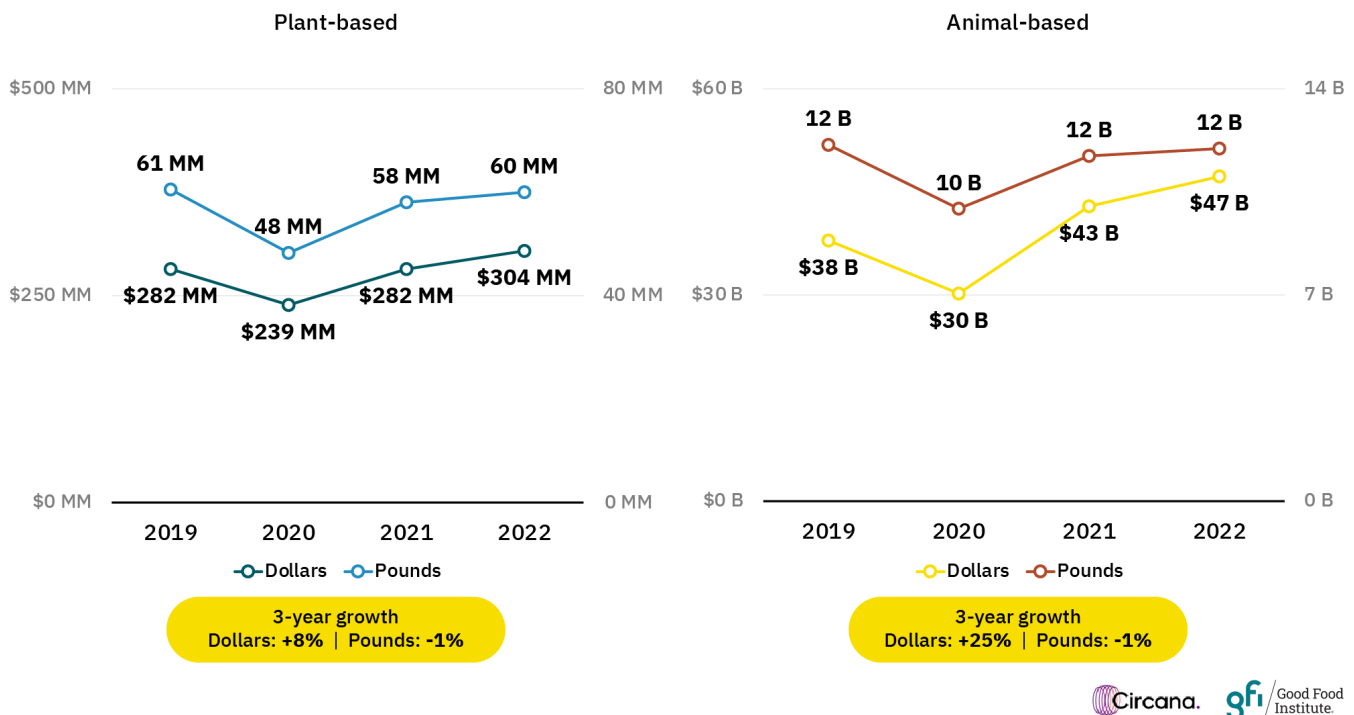


Figure 4: Plant-based protein vs. animal-based meat sales in foodservice (2019–2022)

Source: Circana/SupplyTrack, Product class: Plant-based proteins and animal meat. Dollar and pound sales are 12 months ending December 2022 vs three prior years.

It is clear that, although massive shifts in purchasing behavior due to the pandemic started three years ago, the foodservice sector is still working its way back to pre-pandemic levels. Operators remain challenged by labor shortages, supply chain disruptions, and inflation.

Labor shortages

In a 2022 survey, recruiting and hiring hourly staff and rising labor costs were cited as the third and fourth most pressing challenges for operators.

Supply chain disruptions

Both plant- and animal-based proteins were impacted by lower-than-anticipated global pea and soybean yields, sanctions on Russia—the world’s largest fertilizer exporter—and elevated energy costs, all of which drove up costs of production. Rising sea and rail freight costs also contributed to price increases for both plant and animal proteins.

Inflation

As many as 83 percent of U.S. adults who say they made changes to the way they eat and drink in January 2023 as a result of inflation cited eating out at restaurants less often as a change. Additionally, operators cited meat as the top ingredient or product category experiencing high levels of price inflation when sourcing.

Rising prices across all meat categories

By December 2022, food prices for eating out in the United States were higher by eight percent compared to the prior year. At the wholesale level in broadline distribution, plant-based protein prices increased by four percent from 2021 to 2022, while prices of animal-based meat increased by eight percent. Final consumer prices likely experienced even more growth due to additional factors such as increased operator labor costs. Wholesale food costs based on operator purchases from distributors is just one of many factors that contributes to the final consumer price.

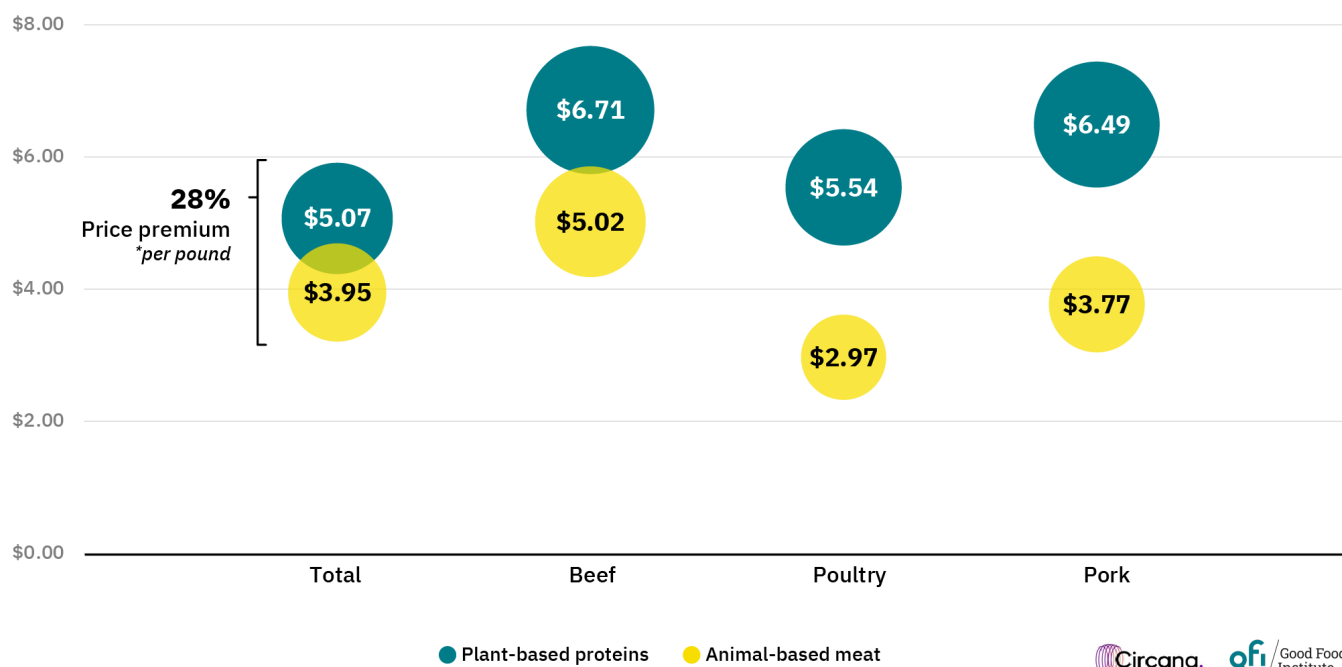


Figure 5: The per-pound price premium for plant-based proteins in U.S. foodservice, 2022

Note: Total plant-based proteins includes plant-based beef, poultry (chicken/turkey), pork, seafood, lamb, tofu, tempeh, grain/nut/veggie, and others. Total animal-based meat includes poultry, beef, pork, seafood, and hot dogs/sausage/specialty meat. For referencing the plant-based meat price premium over animal-based meat, we recommend using the beef, chicken, and pork categories shown above.

Source: Circana/SupplyTrack, Product class: Plant-based proteins and animal meat. Dollar and pound sales are 12 months ending December 2022 vs 3 prior years. Avg price per pound = total \$s/total pounds.

Notably, the plant-based beef subcategory has seen a decrease in average price per pound of 11 percent relative to 2019 levels. Possible reasons for declining prices may include companies achieving increased scale and securing more favorable agreements with distributors as a result. Nonetheless, this is an encouraging sign that progress is being made toward closing the price gap in the most mature plant-based meat subcategory.

Recent data from the U.S. Bureau of Labor Statistics demonstrates volatility in food prices and high food inflation over the last few years (Figure 6). Food-at-home inflation is high (although it was even higher throughout much of 2022), and food-away-from-home inflation is over double its average level over the most recent decade.

Increased prices across the foodservice sector are likely to continue to play an important role in purchasing behavior as consumers tighten budgets and turn to more affordable food options.



Both the existing price gap and ongoing inflationary trends pose challenges for plant-based proteins that sit at a significant premium to their animal-based counterparts—closing the price gap and strengthening plant-based products' value proposition are clear opportunities for the category.

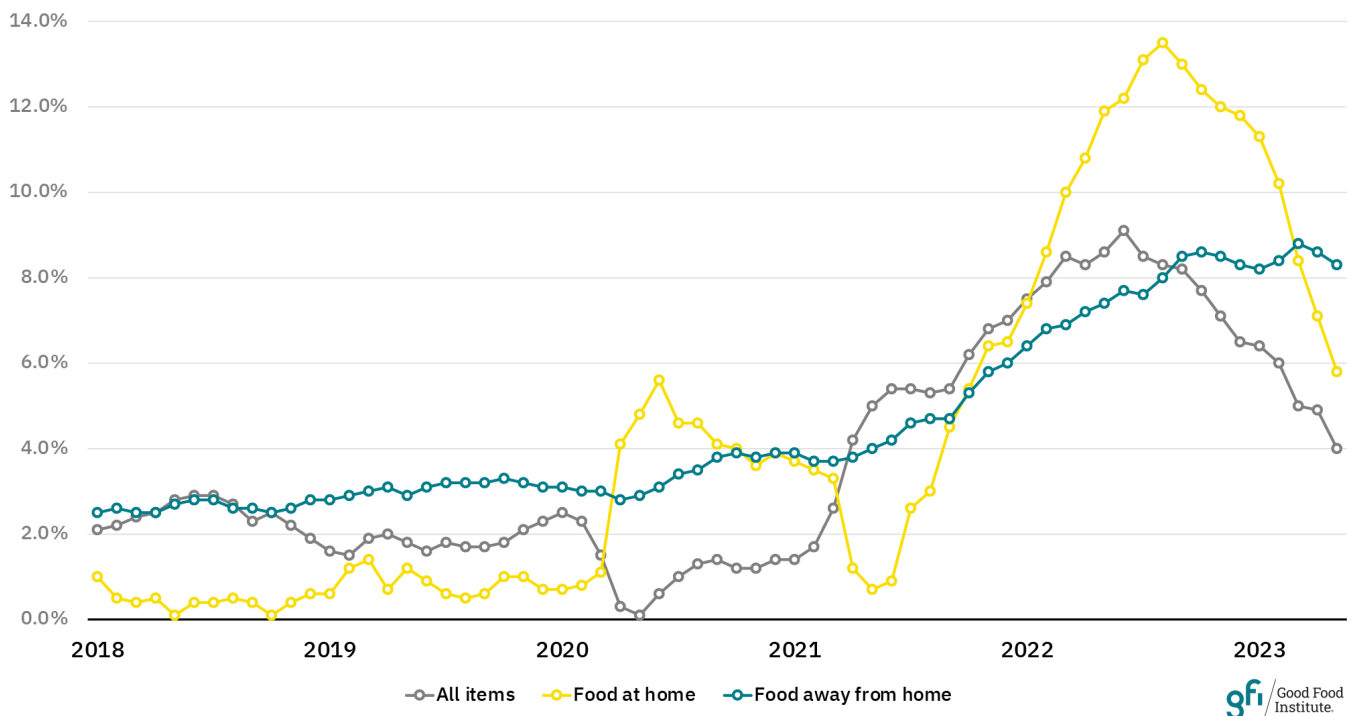


Figure 6: U.S. consumer price index 12-month percentage change, Jan 2018–May 2023

Source: U.S. Bureau of Labor Statistics, 12-month percentage change, Consumer Price Index, Jan 2018 - May 2023

02 Characterizing the plant-based protein category

Formats, substitution types, and ingredients

Despite monumental progress in the introduction of new product types and formats over the last decade, it is clear that significant opportunities remain to expand and diversify available offerings in plant-based proteins.

The category is dominated by plant-based beef products, followed by tofu, veggie-forward items (e.g., bean burgers), plant-based chicken, and plant-based pork (Figure 7). Since 2019, plant-based chicken has nearly doubled its pound sales, emerging as one of the top plant-based meat segments.

The most common product format is patties, at 43 percent of all category pound sales. Blocks (primarily tofu) and grounds are also common and all other

remaining product formats make up just one-fourth of plant-based proteins sold. It is important to note that there is less variety in the types of product formats given these are products captured at the wholesale level, therefore not necessarily representing how these items show up on consumer plates. For example, tofu sales primarily fall into the block format but are prepared in a variety of ways at the operator level.

Given that beef alternatives and tofu make up most of the category, nearly 60 percent of all plant-based protein sales contain soy as the primary ingredient.

This highlights large opportunities for novel ingredient types to be scaled up and for product types to be diversified to provide greater variety in plant-based protein offerings and meet evolving consumer needs.

For manufacturers working on product development, reference GFI's [Plant-based meat manufacturing guide](#) and [Plant Protein Primer](#).

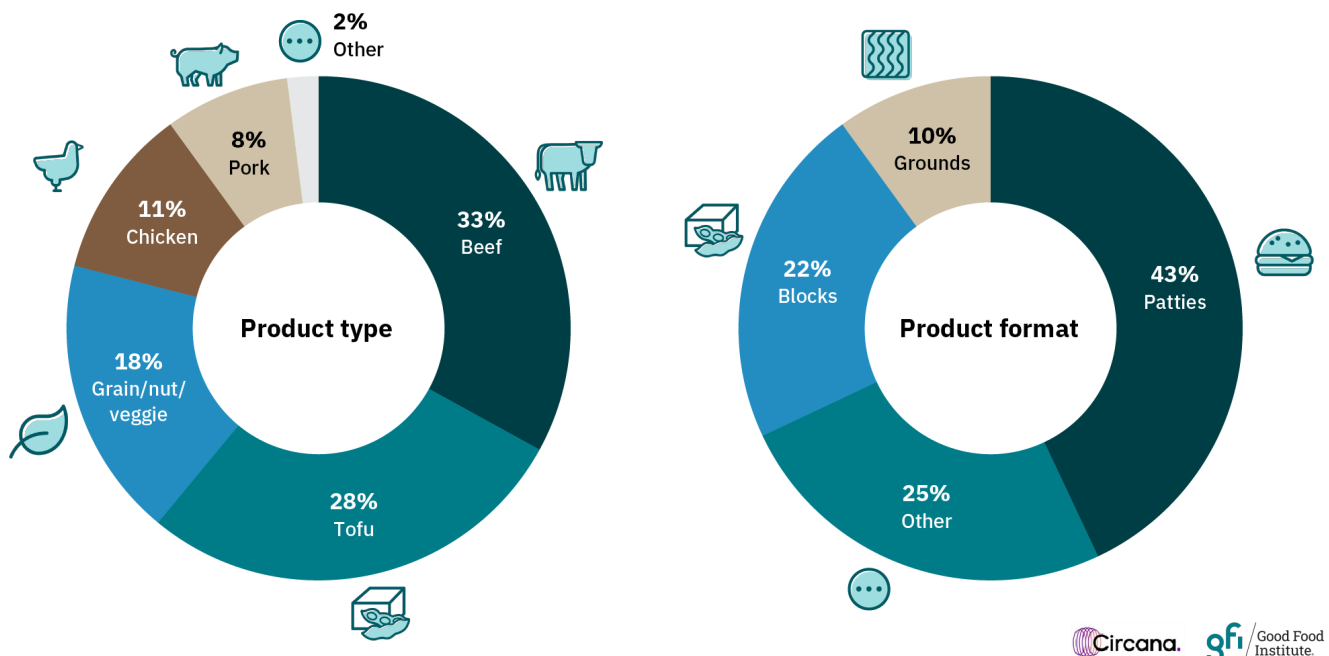


Figure 7: Product type and format share of plant-based protein pound sales, 2022

Source: Circana/SupplyTrack, Product class: Plant-based proteins. Dollar and pound sales are 12 months ending December 2022 vs three prior years. Other = not specified, tempeh, fish, shrimp, turkey, crab, lamb*

Meat analogs vs. non-analogs (e.g., veggie/bean burgers and tofu)

Just as we've seen [in U.S. retail](#), in foodservice, analog plant-based proteins that aim to match the taste and texture of animal-based meat have overtaken non-analogs like bean/veggie burgers and tofu. In 2019, analog products captured nearly 40 percent of pound sales of plant-based proteins

compared to non-analogs at 60 percent (Figure 8). By 2022, analogs made up the majority (53 percent) of pound sales. This data underscores the importance of formulating plant-based products and dishes that look, smell, and taste like animal-based meat, as these are the products consumers are increasingly incorporating into their spending patterns.

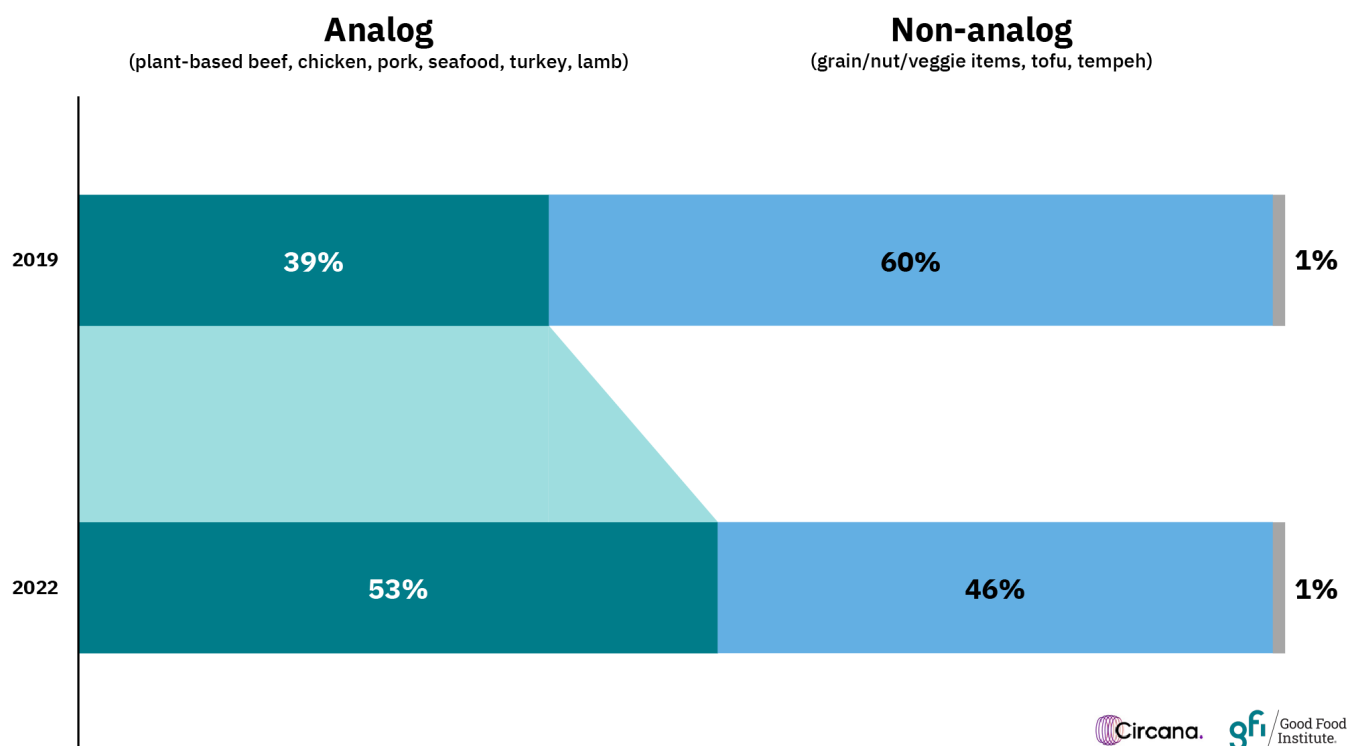


Figure 8: Analog vs. non-analog share of plant-based protein pound sales (2019 vs. 2022)

Note: Remaining 1% represents 'not specified' plant-based protein sales.

Source: Circana/SupplyTrack, Product class: Plant-based proteins. Dollar and pound sales are 12 months ending December 2022 vs three prior years. Avg price per pound = total \$'s/total pounds

Analog: Items that are meant to replicate the taste, texture, and appearance of traditional meat (e.g., Impossible Burger, Beyond chicken tenders). This dataset includes plant-based beef, chicken, pork, seafood, turkey, and lamb.

Non-analog: Items with more vegetable-forward ingredients that are not meant to directly replicate the characteristics of traditional animal-based meat. This dataset includes tofu, grain/nut/veggie products (e.g., bean burgers), and tempeh.

Emerging plant-based categories

Among plant-based protein types, plant-based chicken, pork, and seafood sales have experienced significant growth since 2019, and continue to capture larger shares of the overall plant-based protein category. These products are taking market share from more veggie-forward options such as tofu, tempeh, and grain/nut/veggie products. Mirroring retail, foodservice is experiencing plant-based protein success with product types that provide consumers with products that offer a taste and experience similar to animal-based meat. By moving beyond the veggie burger, operators are creating more opportunities for consumers to exercise choice and experiment with new flavors that meet their needs. By diversifying their selection of plant-based meat alternatives, plant-based meat manufacturers can cater to foodservice operators who may be looking for not only alternatives to animal-based burgers, but also for chicken, seafood, and pork (Figure 9, Table 2).

The growing availability of plant-based products across product and protein types means that operators can increasingly offer plant-based versions of existing menu items across cuisines and formats and appeal to a wider range of customers.

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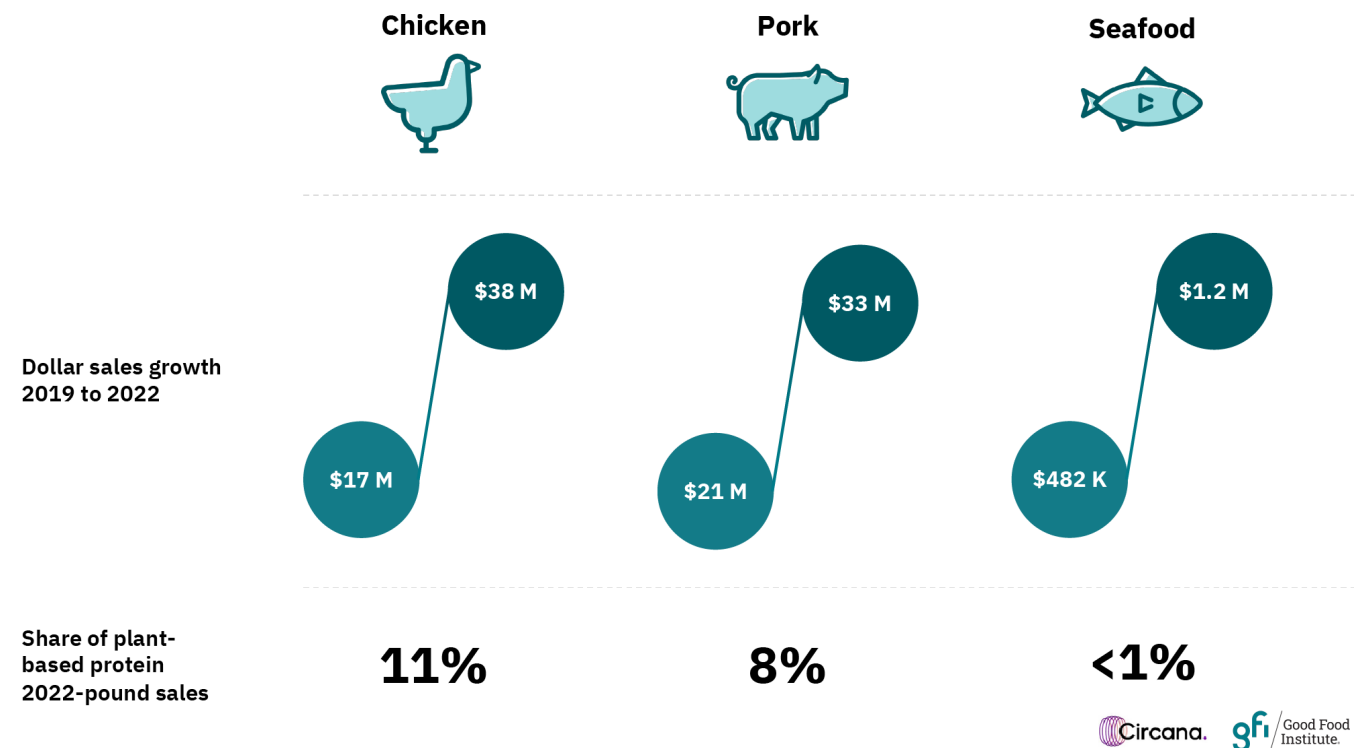


Figure 9: Emerging plant-based categories

Source: Circana/SupplyTrack, Product class: Plant-based proteins. Dollar and pound sales are 12 months ending December 2022 vs three prior years. Seafood = crab, fish, and shrimp.

Table 2: Emerging alternative protein launches and limited-time-offers (LTOs) in U.S. foodservice, 2022

Plant-based brand	Product	Restaurant
Abbot's Butcher	Plant-based chorizo	Freebirds World Burrito (multiple locations)
Barbecue	Wood-smoked plant-based meat	Juice Press (NY)
Chunk Foods	Marbled plant-based steak	Coletta (NY)
Good Catch	Plant-based seafood	Next Level Burger (multiple locations) Ladle and Leaf (CA)*
Hooray Foods	Plant-based bacon	Just Salad (multiple locations)
Meati	Mycelium chicken cutlets	Birdcall (multiple locations)
Sempura Organics	Mycelium-based meat	Ettan (CA)
The Plant Based Seafood Co.	Mind Blown Crab Cakes	University of California at Riverside (CA)
TiNDLE	Plant-based chicken	Veggie Grill (multiple locations)
Umaro Foods	Seaweed-based bacon	Egg Shop (NY) Sorrel (CA)* D'Andrews Bakery and Cafe (TN)

NOTE: Menu items with a * were limited time offerings (LTOs).

Foodservice segments

It is also important to consider where plant-based products show up in the foodservice sector. In 2022, quick service restaurants (QSRs) accounted for nearly 40 percent of all pound sales for plant-based proteins (despite QSRs accounting for but 33 percent of total foodservice sales). Full-service restaurants (FSRs) and educational institutions also contribute significantly to the category (Figure 10).

Plant-based protein sales in educational environments experienced a particularly sharp decline in 2020 as a result of schools turning to remote learning. Nevertheless, these sales have rebounded significantly since then, surpassing 2019 sales levels by 24 percent in 2022. Additionally, tailwinds are strong: foodservice management companies such as Sodexo and Aramark have made robust commitments to increasing plant-based menu items at universities and college campuses. By the number of menu items they offer, 36 percent of

Sodexo's university menus are already plant-based, and they've committed to increasing that percentage to 50 percent by 2025. Aramark has similarly committed to making their university menus 44 percent plant-based by 2025. These commitments from industry leaders set an example for other foodservice management companies to prioritize plant-based options, which can help them meet their sustainability goals and appeal to a growing consumer base.

In the restaurant world, consumers still appear to be working their way back to normal. In 2022, pound sales of plant-based proteins were one percent lower in QSRs and five percent lower in FSRs compared to 2019.



Opportunities exist across segments for operators to continue to develop and grow their plant-based protein offerings. In particular, plant-based menu items under-index in full-service restaurants. Expanding on the types of products offered as well as the number and type of environments in which they are prepared and served will be important to meet consumers where they are and, in turn, lead to increased adoption.

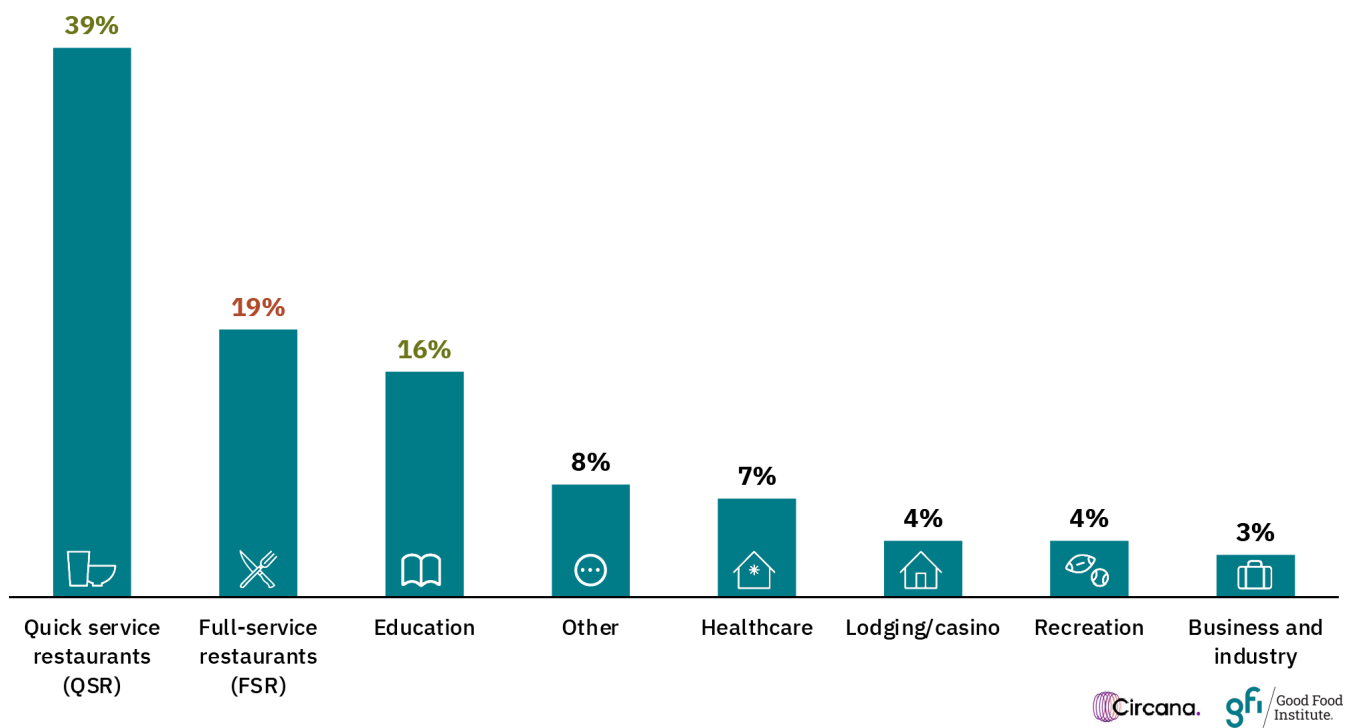


Figure 10: Operator segment share of total plant-based protein pound sales, 2022

Note: Green highlighted percentages indicate where plant-based protein sales over-index in that channel relative to total food. Red indicates under-indexing. Black indicates share is within 2 points of the respective total food share.

Source: Circana/SupplyTrack, Product class: Plant-based proteins. Dollar and pound sales are 12 months ending December 2022 vs three prior years.

03 Consumer insights

Over the last decade, target consumers of plant-based offerings have shifted from a small subset of vegans and vegetarians to a wider market of meat-eaters. This has been made possible by new products and reformulations that position plant-based meat as meaty, tasty, sustainable, and a healthy alternative to animal-based meat. The continuation of these trends, however, is not inevitable. Making further progress on taste and price will be key to reaching more meat-eaters and expanding the market. The following consumer insights explore current consumption patterns in foodservice and where further consumer opportunities remain.

continue to gain purchasing power, they represent an increasingly important consumer group for markets everywhere, including the plant-based protein market in foodservice. Globally, Credit Suisse estimates that Gen Z and Millennials made up 48 percent of global spending in 2020, a number expected to rise to 69 percent by 2040.



Maintaining and growing Gen Z and Millennials' openness to and adoption of plant-based meat could be a major long-term growth opportunity.

Consumer demographics

Similarly to retail, in foodservice, younger (18-24), male, and Black, Hispanic, and Asian consumers are more likely to purchase plant-based meat than the average consumer.

Younger generations' interest in plant-based foods is potentially promising for the industry if those preferences are maintained. As younger generations

Penetration and frequency

Nearly one in 10 U.S. consumers purchased plant-based meat alternatives in foodservice environments in 2022. On average, these buyers purchased these items just two or three times throughout the year, and as we can see in Figure 11, the majority were one-time purchasers.

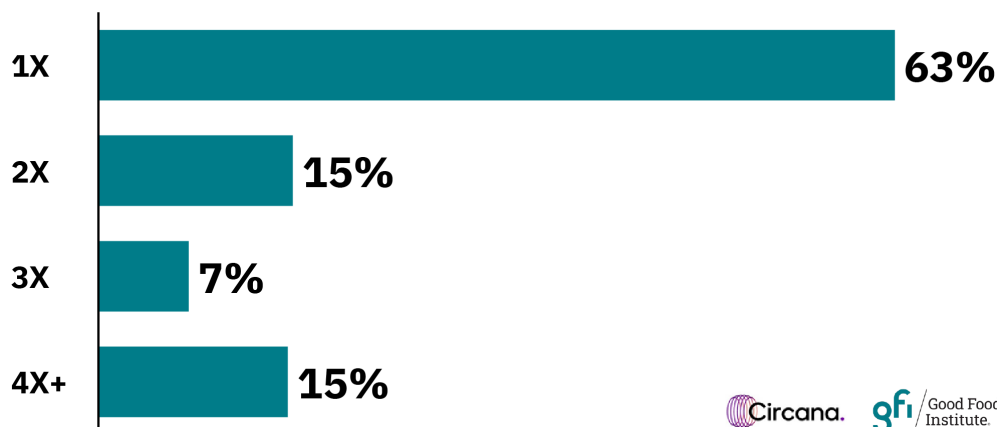


Figure 11: Plant-based buyer repeat purchase rate (percent of buyers purchasing by the number of times purchased in a year), 2022

Source: Circana/Checkout - 12 months ending December 2022

Despite these relatively low figures, consumers report an eagerness for more plant-based proteins. Mintel's 2022 report found that five in 10 omnivores and eight in 10 flexitarians agree that more restaurants should serve plant-based meat alternatives. These trends underscore the need to

continue investing in developing and expanding plant-based menu items that achieve taste and price parity with animal-based meat. This will help attract new consumers, particularly meat-eaters, to the category, and increase repeat rates with existing consumers.

Making flavor the primary message and pricing plant-based items competitively with other menu options are two of 19 ways to promote plant-based items on menus.

The value of the plant-based buyer

The plant-based meat buyer¹ makes over 30 more foodservice visits per year than the average buyer² and spends approximately \$400 more at foodservice operators annually. Plant-based meat consumers appear to be among the most engaged foodservice customers, making them an important consumer group to attract and retain in operators' strategies. Offering at least one plant-based dish on the menu has long been critical to appealing to groups with at least one member who has a "veto vote" (e.g., a plant-based, vegan, or vegetarian consumer). But today and into the future, with meat-eaters and flexitarians also seeking out plant-based options, offering a variety of plant-based meat dishes that taste as good or better than animal-based meat and cost the same or less will be important to get more and more customers in the door and keep them coming back.

The plant-based meat buyer makes over 30 more foodservice visits per year than the average buyer, spending approximately \$400 more at foodservice operators annually.

For more information on what matters to consumers, visit GFI's [consumer insights webpage](#).

¹ Plant-Based Buyers: purchased plant-based meat at least once in the 12 months ending in Dec '22 (n = 5,625).

² Total Foodservice Buyers: purchased from foodservice at least once in the 12 months ending in Dec '22 (n = 100,544).

04 Conclusion

Foodservice is an important channel for shaping food culture and behavior. For the plant-based industry, foodservice represents an opportunity to increase trial and adoption by introducing new products in a curated and often social setting where consumers are interested in trying new things. The foodservice sector provides valuable insight into product performance and consumer behavior and purchasing patterns. While the last few years have been challenging ones during which to launch new products into foodservice, the sector in the United States is returning to pre-pandemic sales levels. Despite recent volatility, foodservice is a key market entry point for plant-based products.

The long-term performance of plant-based proteins in foodservice indicates that the plant-based category is continuing to mature. Opportunities abound in diversifying plant-based products across categories, formats, and flavors, as well as strategically advancing toward taste and price parity with animal-based meat. Improving the taste, texture, and affordability of plant-based meat has the potential to vastly improve the value proposition and appeal of plant-based products. Also on the horizon—and already launched in some categories—are solutions like alternative fats and fermentation-enabled ingredients that can help products achieve a closer taste profile to

animal-based products. In addition, many consumers recognize the climate, health, and animal welfare benefits of alternative proteins, which may contribute to consumer uptake after the table stakes of taste and affordability are met. All in all, industry stakeholders acknowledge room for improvement, and market projections for alternative proteins are often based on an understanding that product development and innovation will play key roles in driving future growth. It is thus essential for the alternative protein industry to work closely with foodservice companies to develop new products, dishes, and strategies that cater to the diverse range of consumer preferences.

Opportunities abound in diversifying plant-based products across categories, formats, and flavors, as well as strategically advancing toward taste and price parity with animal-based meat.

About the data

Distributor to operator sales data

GFI commissioned foodservice sales data from Circana, formerly IRI & NPD, focusing on the plant-based proteins category. 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 17 participating broadline distributors and 80+ individual subscribing manufacturers, data from 280+ categories, and collects 700K+ purchases monthly. SupplyTrack covers ~41 percent of the total foodservice landscape (86 percent 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 & Industry, Lodging/Casino, Recreation, and other noncommercial environments.

The SupplyTrack data obtained from Circana covers plant-based protein sales across the U.S. market for the four years 2019, 2020, 2021, and 2022, all 12 months ending in December.

Plant-based protein definitions

- **Includes:** Meat alternatives or meat analogs, meat substitutes or nonmeat or vegan/vegetarian protein products that are substitutes that approximate certain aesthetic qualities (texture, flavor, appearance) and characteristics of specific types of meat, e.g., beef and burgers, bacon slices, chicken, turkey, pork, sausage, hot dogs, crab, fish, shrimp, and jerky. These proteins are made from nonmeat ingredients such as various beans, including soy, black beans, chickpea/garbanzo beans, mushrooms, seitan/vital wheat gluten, TVP (textured vegetable protein), tempeh (fermented soybeans), and other vegetable-based proteins. Some products, like those marked vegan, are also made without other animal products such as dairy.
- **Excludes:** Any animal-derived meat-type proteins. Vegan or vegetarian items that are not meat substitutes. Entrees containing alternative, nonmeat proteins. Pizza containing alternative meats. All bacon bits. Vegan or vegetarian meat-flavored gravy or sauces. Vegan or vegetarian replacements for dairy products (e.g., eggs, milk, butter, cheese, mayo, sour cream), veggie corn dogs.

Consumer panel data

To understand consumer purchasing dynamics and demographics in foodservice, GFI also commissioned a buyer analysis leveraging Circana's Checkout platform. Circana's Checkout consumer panel features 150K+ active panelists uploading their receipts across retail and foodservice chains, capturing 9 million foodservice receipts annually. More than 550 foodservice chains are captured across QSR, FSR, fast casual, and convenience stores. This buyer analysis looks at shoppers who purchased plant-based meat alternatives, specifically analog items meant to replicate the taste and texture of animal-based meat in captured foodservice environments. This data looks at related purchases over the latest year 2022, 12 months ending in December as well as trended purchases versus 2019, 2020, and 2021.

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About GFI

The Good Food Institute is a 501(c)(3) nonprofit working internationally to make alternative proteins like plant-based and cultivated meat delicious, affordable, and accessible. GFI advances open-access research, mobilizes resources and talent, and empowers partners across the food system to create a sustainable, secure, and just protein supply. GFI is funded entirely by private philanthropic support.



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