



Consumer snapshot: **Plant-Based Meat** in the U.S.

—
Overview of consumer needs, perceptions,
and demand, 2024



Photo courtesy of Tender Food

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Trends in plant-based meat consumption and perceptions

Many Americans eat plant-based meat frequently or occasionally. But many have not heard of or heard much about it, giving it room to grow.

All data from Poll by Morning Consult on behalf of GFI: n=3,079 U.S. adults, December 2024, unless otherwise specified

How many Americans have heard of plant-based meat?

Most Americans know about plant-based meat, but a significant portion do not.

- 69% of Americans say they've heard of plant-based meat, while 21% say they have not and 11% are unsure.

How many Americans eat plant-based meat, and how often?

More than half of Americans say they've eaten plant-based meat, and many of them say they eat it frequently.

- 53% of Americans report having eaten plant-based meat at some point, and 40% report eating it in the past year.
- 24% of Americans are frequent or occasional users who eat plant-based meat at least once a month.
- Another 15% are less frequent users who eat it once or a few times a year.
- 43% of Americans say they have never eaten plant-based meat and 4% are unsure or have no opinion.¹

- 13% of Americans are lapsed consumers, who have eaten plant-based meat previously but not in the past year (this equates to 25% of the 53% who have ever eaten plant-based meat. For reference, SPINS data from 2023 showed that 15% of American households purchased plant-based meat and seafood in retail in 2023, and that 62% of those households purchased it more than once.²

This difference is likely driven by households where more than one person eats plant-based meat, and consumers ordering plant-based meat in foodservice settings:

- 56% of plant-based meat eaters who live in households with one or more others claim that other people in their household eat plant-based meat too.³
- 52% of Americans who purchased plant-based meat in the past year did so only in retail. 16% did so only in foodservice settings. 25% reported purchasing in both channels (the remaining 7% did not recall).

Which Americans eat plant-based meat?

People from many different consumer groups eat plant-based meat, but younger people, men, people who do not identify as white, and consumers in the West and Northeast are more likely to say they eat plant-based meat today.

Gen Zers and Millennials are much more likely than Gen Xers and Baby Boomers to report eating plant-based meat at least once a month: 28% for both Gen Zers and Millennials, vs. 17% for Gen Xers and 10% for Boomers respectively

Male consumers are slightly more likely than female consumers to report eating plant-based meat at least once a month: 22% vs. 17%.

Consumers who identify as non-white are more likely than consumers who identify as white to report eating plant-based meat at least once a

month: 16% of white consumers report eating plant-based meat at least monthly, vs. 26% black, 25% hispanic, and 25% other. From household panel data, it is also known that consumers who identify as Asian American spend more on plant-based meat in retail in terms of dollars per buyer compared to other groups.⁴

Consumers in all census regions are comparably likely to eat plant-based meat at least once a month:

- 22% in the Northeast
- 21% in the West
- 19% in the South
- 18% in North Central (midwest)

For more data: gfi.org/marketresearch

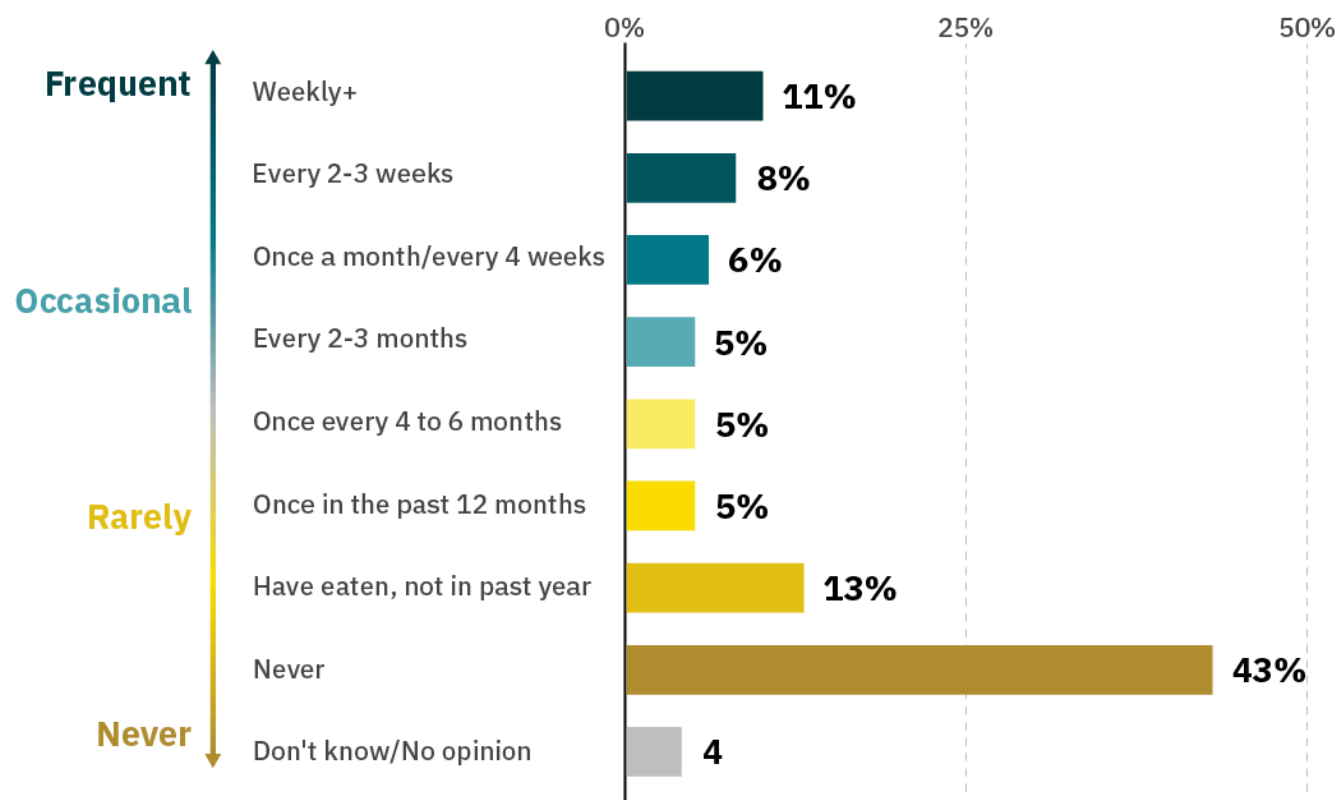


Figure A: How often have you eaten each of the following in the past 12 months? For whichever of: plant-based meat, plant-based poultry, or plant-based seafood; each person ate most frequently

How are consumption patterns changing among current consumers?

Of those who ate plant-based meat in 2023, 31% reported eating more than in previous years. However, while 23% reported eating less than in previous years. Household purchasing panel data in 2023 found that fewer households purchased than in 2022, while the percentage of households that purchased repeatedly held steady. And retail sales of plant-based meat were slightly down.⁵ This suggests some consumer “churn”: while many consumers are eating more plant-based meat, more on net are eating less, making it important for brands and the category overall to retain consumers and convince current ones to buy and eat more.

Do people who eat plant-based meat also eat conventional meat?

Most people who eat plant-based meat also eat conventional meat, suggesting the category appeals to omnivores and flexitarians, not just vegetarians and vegans.

57% of plant-based meat eaters identify as omnivores (defined as eating conventional meat and dairy). 15% are flexitarian, defined as “currently reducing meat consumption.” Only 11% of plant-based meat eaters are vegetarian, pescatarian, or vegan. An additional 15% of plant-based meat eaters identify as carnivores, which was defined as “trying to eat primarily meat and other animal products,” suggesting that plant-based meat appeals to many meat-focused consumers. The remaining 3% did not identify with any of these common diet types offered.

To learn more about plant-based meat’s performance in the retail market, visit: gfi.org/marketresearch

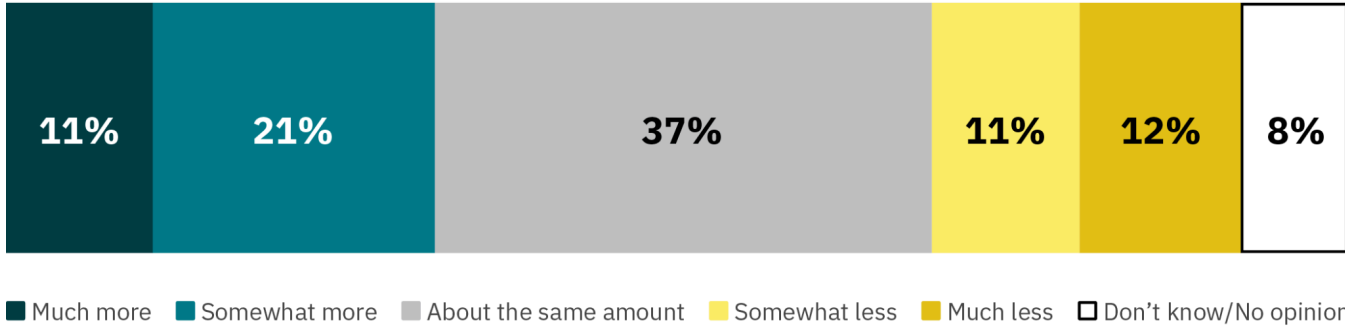


Figure B: Would you say you have been eating more, less, or about the same amount of each of the following over the past 12 months? Plant-based meat or seafood

Among n=1,222 who reported eating plant-based meat or seafood in the past year

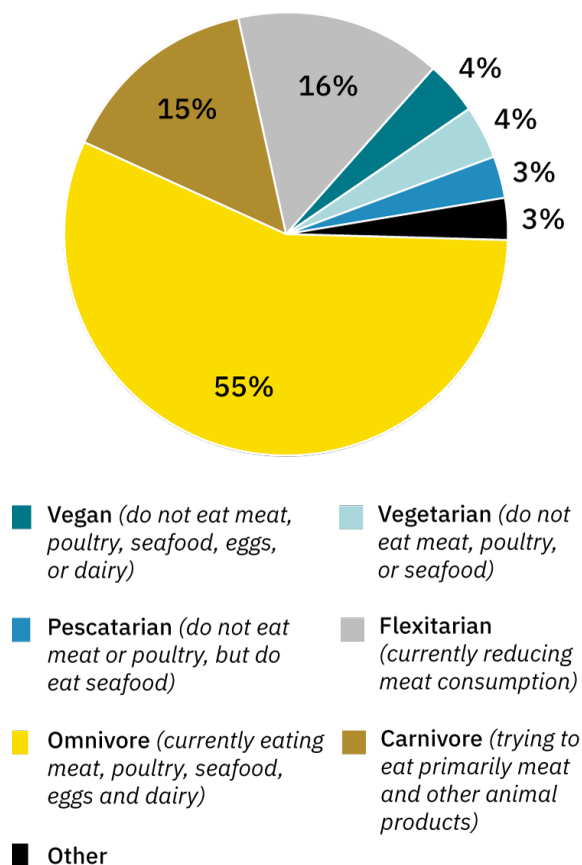


Figure C. Self reported diets followed by past-year plant-based meat eaters

Households that do not buy conventional meat tend to spend more on plant-based meat than those that do buy conventional meat, suggesting they are a valuable and engaged consumer group.

Households that didn't buy conventional meat in retail in 2023 (just 0.6% of estimated households) spent 3x more on plant-based meat in retail than those that also bought conventional meat: \$173 per year vs. \$54.⁶

Households that don't buy conventional meat are disproportionate spenders, though their estimated spending accounts for only 13% of dollars spent on plant-based meat in retail overall, vs. 87% from households who also bought conventional meat (\$148.3 million vs. \$970.0 million, respectively).⁶

This suggests that acquiring omnivorous and flexitarian households and encouraging them to purchase more plant-based meat will be key for the plant-based meat category to grow.

How prevalent and important is conventional meat reduction as a driver of plant-based meat choice?

Plant-based meat offers people a meat-like eating experience without conventional meat. This is a unique value proposition for plant-based meat, and a reason many people choose it. But it's not the only reason.

Many people claim to consider the negative consequences of conventional meat consumption when choosing whether to eat it. More than 50% claim to at least somewhat consider: negative health effects; treatment of animals; use of antibiotics, hormones, and steroids; and risk of foodborne illness in deciding to eat conventional meat.

Why people choose plant-based meat

People who see plant-based meat as tasty are more likely to purchase and eat it, but health, sustainability, and a desire to eat less conventional meat also play a role. Many consumers are looking for tastier and cheaper plant-based meat.

But few Americans are actually reducing or eliminating meat consumption. Just 11% of Americans are flexitarian (defined as those who self-report eating less meat in the past year) while 2% are pescatarian, 3% vegetarian, and 2% vegan. And the majority of people who ate plant-based meat in the past year did not follow meat-reducing or -eliminating diets (see previous section).

This suggests that many Americans are interested in eating less meat, but that most are eating plant-based meat for other reasons beyond just reducing how much conventional meat they eat.

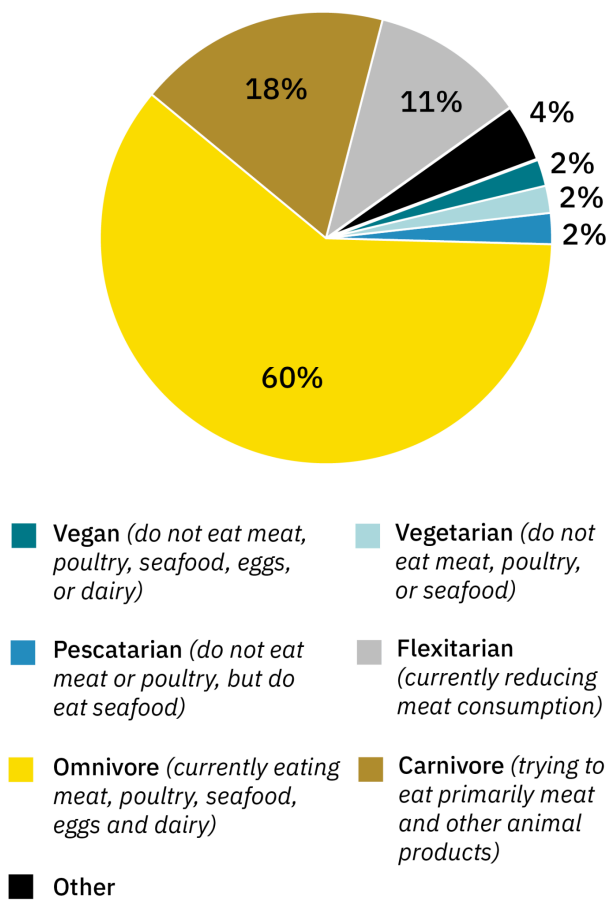


Figure D: Which of the following best describes your current diet or eating habits? Please select one.

What do people think about plant-based meat?

Most Americans see plant-based meat as healthy and sustainable. Most agree it is “very” or “somewhat”:

- Healthy: 67%
- High-protein: 62%
- Good for the environment: 63%

46% of Americans describe plant-based meat as very or somewhat tasty, and 45% say it’s affordable.

Why do people choose plant-based meat?

Whether people see plant-based meat as tasty is most predictive of how likely they are to purchase and how frequently they eat it. 63% of people who rated plant-based meat as “very” tasty said they were “extremely” or “very” likely to eat it in the future, vs 39% of those who rated it as “somewhat” tasty, 14% “not too” tasty, and 5% “not at all” tasty.”

People who eat plant-based meat more frequently are more likely to rate it as tasty. People who eat plant-based meat at least once per month are most likely to rate it as “very” tasty (45%, vs. 37% “somewhat” tasty). By contrast, people who have eaten plant-based meat in the past year but less than monthly skew more toward finding it only “somewhat” tasty (41%, and only 21% “very” tasty).

While many people try and buy plant-based meat for those reasons, this data suggests that taste plays a key role in driving consumption frequency.

How many people eat plant-based meat at home and out-of-home?

Among Americans who reported purchasing plant-based meat in 2024*:

- 53% report eating it just at home, not in restaurants or cafeterias
- 16% report eating it away from home in restaurants/cafeterias, and not at home
- 25% report eating it both at home and away from home

*the remaining 6% did not recall purchasing in any specific locations given

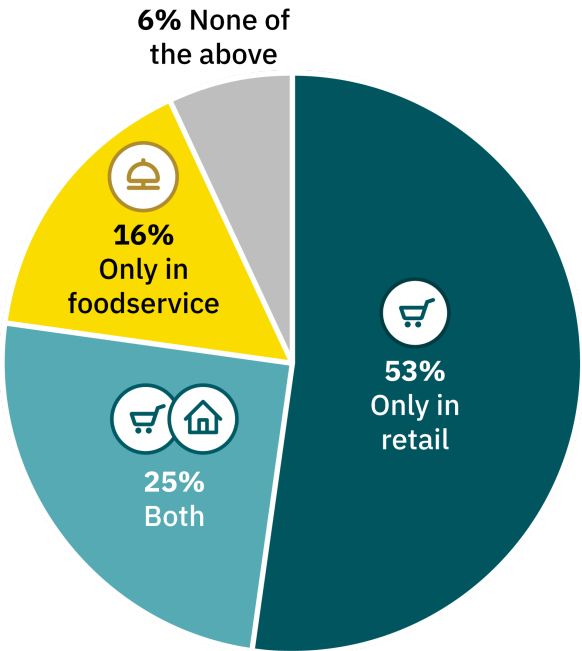


Figure E: Over the past year, where did you purchase plant-based meat products or dishes with plant-based meat?

Some frequent users still can't find plant-based meat at their regular grocery store

A total of 26% of Americans say plant-based meat is 'not too' or 'not at all' easy to find in grocery stores. Of consumers who eat plant-based meat monthly or more, 56% say they buy it at their usual grocery store, though 24% say they have to go to a different grocery store to find it. This data suggests that while most consumers who are interested in plant-based meat are able to find it, there may still be room for the industry to drive sales through broader distribution, or distribution at stores where plant-based meat consumers currently shop but that do not stock plant-based meat.⁷

How many have not tried plant-based meat, ever or recently?

While more than half of Americans (53%) report having eaten plant-based meat, almost half have not or are unsure (47%, referred to below as "holdout" users). A small percentage of Americans (13%) have eaten plant-based meat previously, but did not in 2024. This equates to 25% of the 53% who have ever eaten plant-based meat (referred to below as "lapsed" users).

While there are many more holdout users than lapsed users, survey data summarized below suggests it will be easier to reacquire lapsed users than to attract holdout users.

Who are lapsed and holdout users of plant-based meat?

Older consumers are much less likely than younger ones to have tried plant-based meat.⁸ 59% of Baby Boomers and 50% of Gen Xers report never having tried it, vs. 32% of Millennials and 36% of Gen Zers. Men are less likely than women to have never tried plant-based meat: 41% of men, vs. 50% of women. Consumers who identify as white are more likely to have never tried plant-based meat than those identifying as other races: 50% White, 38% Black, and 38% Hispanic, and 36% Asian and other.

Why do people not try or stop eating plant-based meat?

Plant-based meat holdouts cite various reasons for not trying it, including:

- Just preferring animal meat: 43%
- Not liking the taste: 38%
- Being too expensive: 23%
- Not seeing any reason to: 22%

Other reasons like being "too processed," having "ingredients I don't like or recognize," and not being healthy or high protein were all much less prevalent, at 5-12%. This suggests that holdout consumers are unmotivated to try plant-based meat, and skeptical it would match their sensory expectations from conventional meat.

Lapsed users similarly cite preference for animal meat, and that products are too expensive. Compared to holdouts, they are less likely to cite taste or to say they don't see a reason.

- Preferring animal meat: 33%
- Being too expensive: 29%
- Just not thinking about it: 23%
- Not liking the texture: 21%
- Not liking the taste: 18%
- Being too processed: 17%
- Not seeing a reason to eat it: 15%

Acquiring new plant-based meat users vs. winning back lapsed ones

Lapsed users may repurchase as products get tastier and cheaper. Those who haven't yet tried ("holdouts") have low openness today.

Openness among lapsed and holdout users

When holdout and lapsed users are asked what would lead them to purchase plant-based meat, it becomes clear that lapsed users will likely be easier to re-acquire than holdout users will be to acquire.

36% of lapsed users claim they would buy a new plant-based meat product if they tried a sample and its taste and texture were exactly like conventional meat.

Others would be motivated by lower costs (35%) and if it had more protein than conventional meat (24%). Only 29% of lapsed users wouldn't repurchase for any reason.

Most holdout consumers (74%) say they are "not so likely" or "not at all" likely to try plant-based meat in the future, compared to only 50% of lapsed users and 47% of Americans on average. Over half (54%) of these holdout users say they wouldn't try a new plant-based meat product for any reason, compared to just 29% of lapsed users.



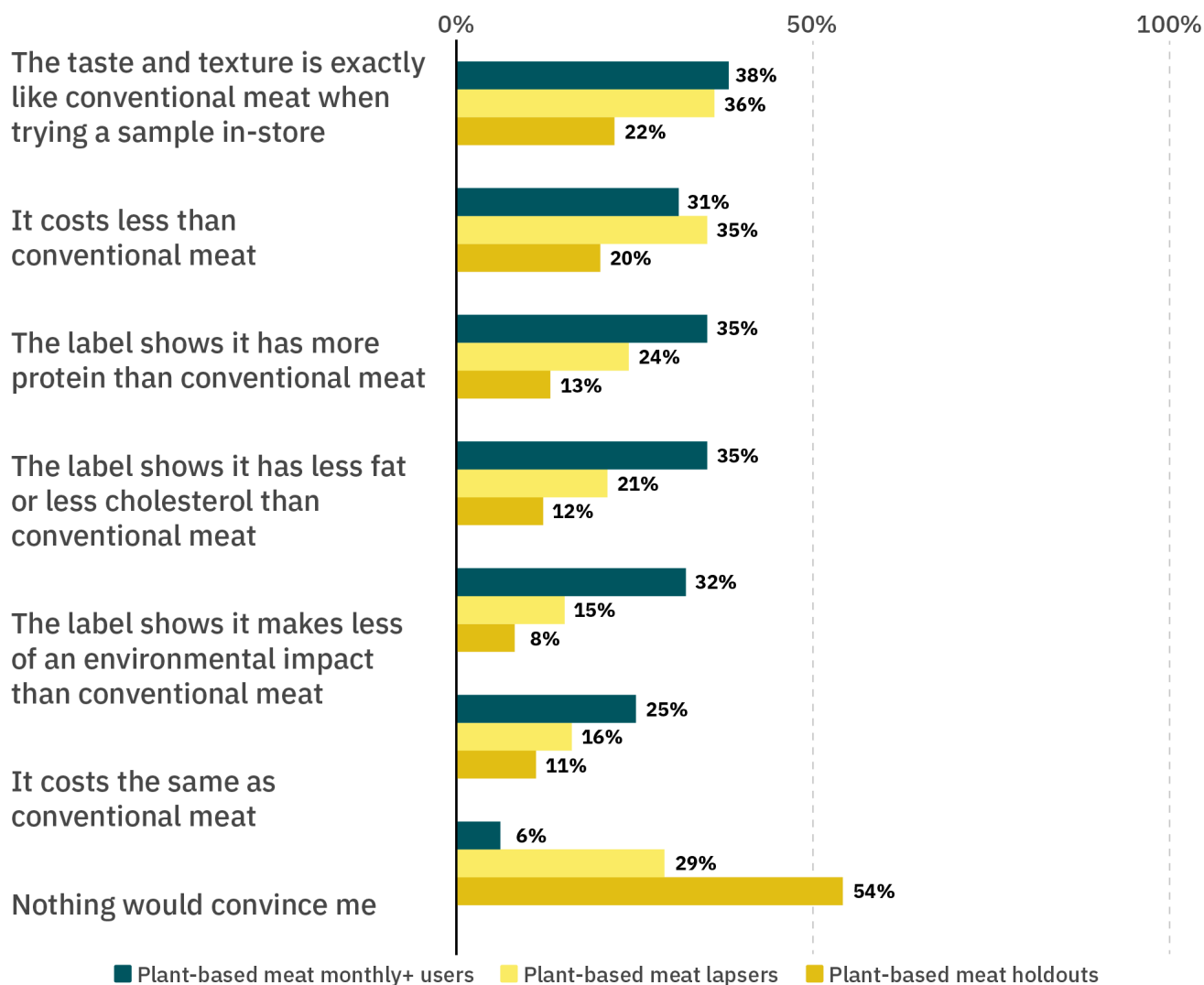


Figure F: Imagine you see a new plant-based meat product the next time you are grocery shopping. Which of the following reasons, if any, would convince you to buy it? Select all that apply.

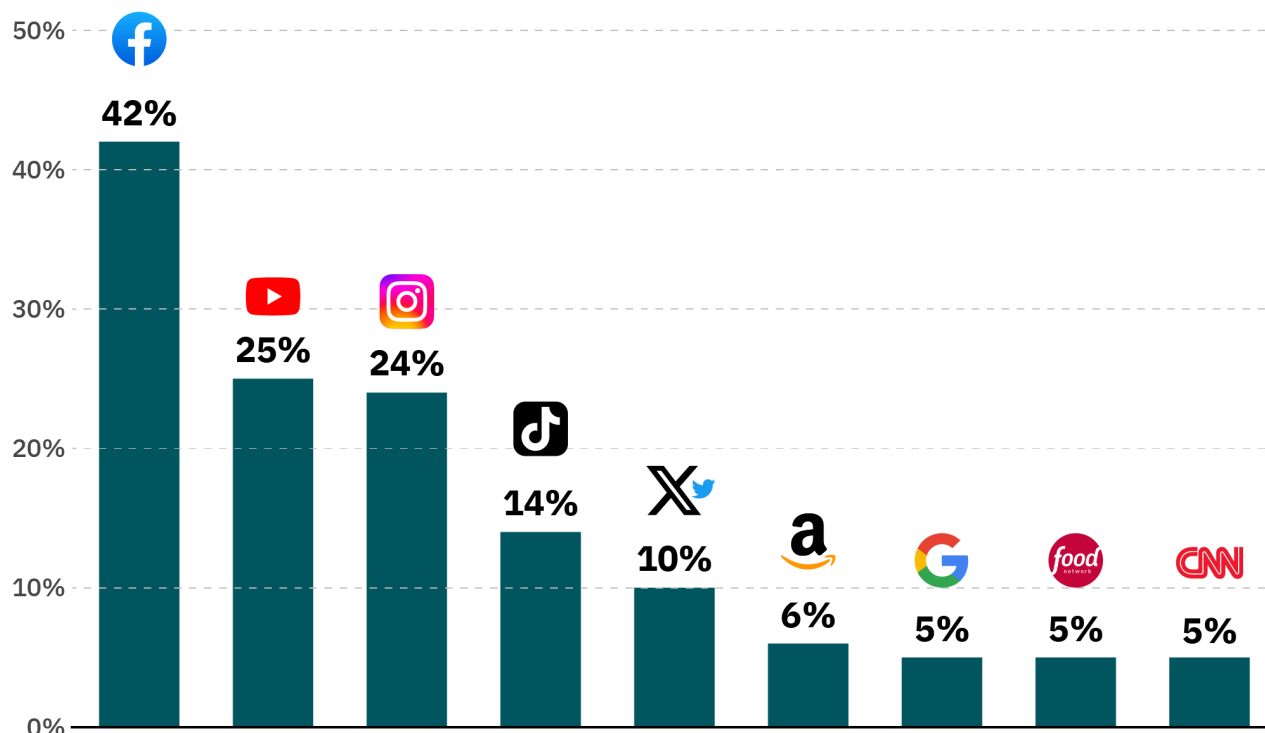


Figure G: Are there specific shows, websites, podcasts, or social media accounts where you've recently seen, read, or heard about plant-based meat? Open end, Top 10 shown.

How much do people hear about plant-based meat, and where?

A total of 41% of Americans recalled seeing, reading, or hearing “a lot” or “some” about plant-based meat in 2024.⁷

In research conducted in 2023, consumers were most likely to report hearing about plant-based meat on social media. The top three platforms they reported hearing about it were:

- Facebook: 42%
- Youtube: 25%
- Instagram: 24%

Plant-based meat in media

Most people see, read, or hear about plant-based meat on social media. They mostly recall positive/neutral coverage, but mis- and disinformation are proliferating.

What do people hear about plant-based meat?

Of those who reported hearing “a lot” or “some” about plant-based meat in the past year, the vast majority reported hearing “mostly positive” (45%) or neutral (47%) coverage, and only 8% “mostly negative.”

Other research suggests that negative information about plant-based meat is proliferating online, including misinformation and disinformation. A report by Changing Markets Foundation found millions of online engagements (likes, shares, etc.) with almost one million posts containing misinformation or disinformation about meat or dairy, with 24% of those specifically questioning the healthiness of plant-based meat and other foods.⁹

What's next?

These patterns of consumption and perceptions tell a story of a category that:

- Has achieved widespread awareness, and some mainstream appeal and consumer loyalty, including among meat-eating consumers.
- Is perceived to deliver health and sustainability benefits by a majority of consumers.
- Appears to have maintained these perceptions among at least some consumers despite a rise in critical coverage and mis/disinformation online, especially on social media.
- Can improve consumer loyalty and re-attract lapsed users with taste, texture, and price improvements, but that will need to find other ways to gain share among non-users.

The Good Food Institute surveys thousands of diverse Americans annually to understand their outlook on alternative proteins and will continue to make the results of this research available to the public as the category evolves.

To learn more about how consumer perceptions translated to performance at shelf, visit: gfi.org/marketresearch

References

1. This uncertainty is common and expected in surveys: for reference, 5% of survey respondents claimed to be unsure if they had eaten beef, pork, chicken, and seafood.
2. National Consumer Panel (powered by Circana), All Outlets, 52 weeks ending 12-3-23
3. GFI survey of n=3,000 U.S. consumers ages 18-59, May 2024
4. National Consumer Panel (powered by Circana), All Outlets, 52 weeks ending 1-1-23
5. gfi.org/marketresearch
6. National Consumer Panel (powered by Circana), All Outlets, 52 weeks ending 12-3-23
7. Poll by Morning Consult on behalf of GFI: n=2,228 U.S. adults, December 2023
8. "Plant-based meat" in this paragraph refers to a single survey response ("plant-based meat, e.g. burgers, sausage"), as opposed to the aggregated figures in other paragraphs which also reflect consumption of plant-based chicken and seafood.
9. Changing Markets Foundation: Truth, Lies and Culture Wars – Social listening analysis of meat and dairy persuasion narratives, 2023



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. All of GFI's open-access insights and data are made possible by gifts and grants from our global community of donors. If you are interested in learning more about giving to GFI, please visit [here](#) or contact philanthropy@gfi.org.

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