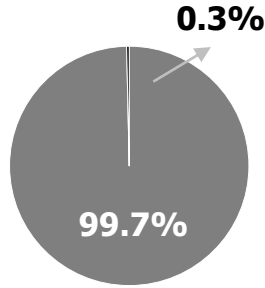


Meat Alternatives

Meat and beef **substitutes** represent a small percentage of the fresh meat and beef markets when considering dollars sold.

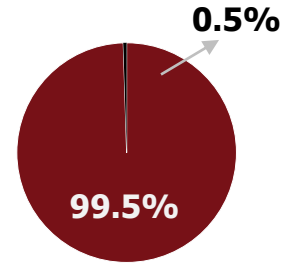
2025 Market Share (Dollars Sold)

Fresh Animal Protein vs. Substitutes



■ All Animal Proteins
■ AP Substitutes

Fresh Beef vs. Beef Substitutes



■ Beef
■ Beef Substitutes

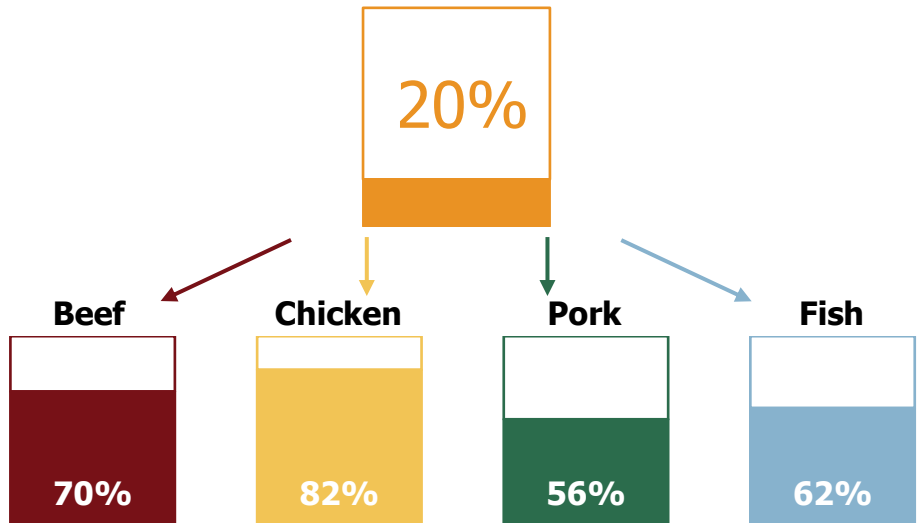
Source: Circana. 52 Weeks, Retail Protein Sales, ending 12/28/2025.
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

Note: Animal protein constitutes beef, bison, chicken, fowl, lamb, pork, turkey, and veal. Beef substitute forms include chubs, ground, and patties. Only fresh products were included in calculations.

Weekly+ Meat Consumption Among Meat Alternative Consumers

Weekly+ **consumption** of meat alternatives is **trending down** (11 percentage points since 2021).

Consumers who eat meat alternatives at least once per week **still frequently eat** a variety of other meat proteins, including **beef**.



Source: Consumer Beef Tracker, January – December 2025.
Analysis: National Cattlemen's Beef Association, a contractor to the Beef Checkoff.

This report was compiled and analyzed by the National Cattlemen's Beef Association (NCBA), a contractor to the Beef Checkoff. To learn more, visit www.BeefResearch.org.