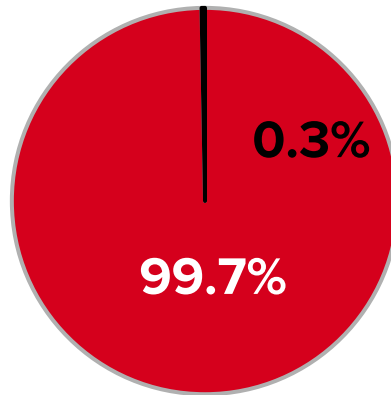


# MARKET SHARE OF FRESH MEAT ALTERNATIVES

Fresh meat and beef substitutes represent a small percentage of the fresh meat and beef markets. This has changed very little over the past few years.

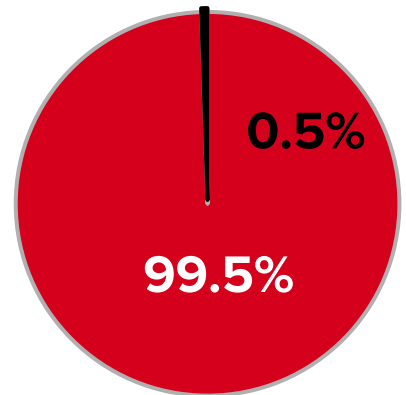
## Market Share of Fresh Meat/Beef Substitutes

Animal Proteins vs. Substitutes



■ All Animal Proteins ■ AP Substitutes

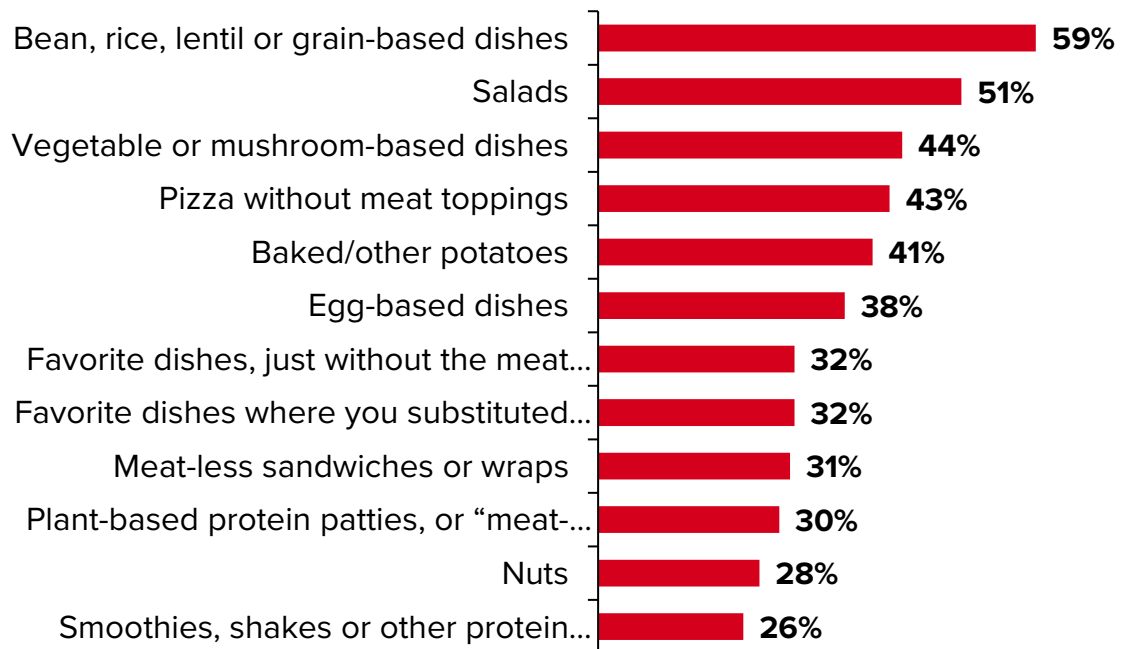
Beef vs. Beef Substitutes



■ Beef ■ Beef Substitutes

Note: Beef substitute forms include chubs, ground, patties. Animal protein constitutes beef, bison, chicken, fowl, lamb, pork, turkey, and veal. Only fresh products were included in calculations.  
Source: NielsonIQ, Discovery. Retail Protein Sales ending 12/31/2022  
Analysis: National Cattlemen’s Beef Association, on behalf of The Beef Checkoff

## Items Consumers Eat Instead of Meat



Source: Directions Research, Consumer Beef Tracker Jan – Dec 2022.  
Analysis: National Cattlemen’s Beef Association, on behalf of The Beef Checkoff.

When consumers are intentionally making or ordering a meal without meat, they aren’t replacing with meat substitutes, instead they are having meals that don’t traditionally contain meat or simply removing the meat.