



Moving the Menu 2026

Major US Restaurant Chains Continue to Fail Customers on Plant Proteins



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Cover photo: Two burritos partially unwrapped in silver foil, reflecting on a white surface. Credit: Getty Images.



Introduction

The Moving the Menu: 2026 Update reevaluates major chain restaurants across multiple cuisine categories in the United States, assessing their progress in expanding plant-based offerings and reducing reliance on animal-based foods since the release of [the 2024 report](#).

This updated assessment examines both structural menu changes and broader company efforts to shift toward more sustainable protein sourcing—critical steps to protecting animals, addressing environmental challenges, and building a more resilient and sustainable food system.

Executive Summary

The 2026 update of Moving the Menu finds that while plant-based foods have become more visible across the U.S. restaurant sector, meaningful structural shifts toward plant-based-by-default menus remain limited. Since 2024, some major chains have maintained existing plant-based offerings or introduced incremental additions, but few have fundamentally redesigned menus to prioritize plant-based options as the standard choice. As a result, most restaurants continue to center animal-based foods, which are responsible for roughly [14.5% of global greenhouse gas emissions](#), significant deforestation, and disproportionate land and water use, fueling climate collapse rather than mitigating it.

A small number of chains demonstrated measurable

improvement through expanded plant-based menu items, removal of surcharges for non-dairy milk, and increased visibility of plant-based offerings. These changes reflect growing consumer demand for alternatives to animal products, improvements in supply chain availability of plant-based ingredients, and heightened public awareness of animal cruelty, and the environmental effects of animal agriculture.

However, overall sector progress remains uneven. All chains assessed continue to rely heavily on animal-based proteins as the default across core menu categories. Plant-based options are frequently offered as optional substitutes, limited-time promotions, or customizable modifications rather than integrated as standard menu offerings. This approach places

the burden on consumers to opt into plant-based choices rather than making them accessible and normalized.

Notably, removing surcharges for non-dairy milk at several major coffee chains marks a significant shift in accessibility, lowering financial barriers for consumers choosing plant-based options. At the same time, broader menu transformation—particularly in entrée categories—has been slower, and some chains have reduced or discontinued plant-based protein trials introduced in previous years.

Since 2024, [industry messaging](#) has increasingly referenced sustainability, menu innovation, and consumer choice. However, in many cases, these statements have not yet translated into measurable reductions in reliance on animal-based ingredients or widespread adoption of plant-based-by-default menu structures.

Overall, the restaurant industry remains in a transitional phase. While awareness and availability of plant-based foods have increased, the default menu structure across most major chains continues to center animal products.

Industry Shifts Since 2024

Positive Shifts: Non-Dairy Milk Surcharge Drop

One of the most notable structural shifts since the 2024 Moving the Menu report is the removal of surcharges for non-dairy milk at several major coffee

chains. In 2024, Starbucks eliminated its additional charge for plant-based milk in U.S. locations, making oat, soy, almond, and other non-dairy alternatives cost-equivalent to dairy milk for customers. [Many chains soon followed suit](#) with similar policy changes, signaling a broader shift in industry norms and competitive expectations. These decisions reflect growing consumer demand for plant-based options and increasing recognition that price parity is essential to making these choices accessible and equitable.

However, while commendable, this change represents only a limited step toward fully integrating plant-based options into restaurant menus. In most cases, dairy milk remains the default option, while plant-based milk continues to be offered only as a substitution upon request. This distinction is critical. Defaults play a powerful role in shaping consumer behavior, and maintaining animal-based ingredients as the standard choice reinforces their continued dominance in the food system.

The next stage of progress will require restaurants to [move beyond simply removing penalties](#) for plant-based substitutions and toward actively integrating plant-based ingredients into default menu configurations. As Starbucks has done, this could include making plant-based milk the default option in certain beverages, prominently featuring plant-based drinks as standard menu offerings, or designing beverages and meals that are fully plant-based by default rather than dependent on customer modification.





Emphasis on High-Protein Options

Across the restaurant industry, “high protein” has emerged as one of the [dominant menu trends](#), shaping product development, marketing, and consumer perception. This trend has been fueled by broader cultural narratives—amplified by movements such as “Make America Healthy Again” (MAHA)—that equate high protein intake with strength, vitality, and health.

However, restaurants continue to overwhelmingly frame animal-based products as the default and ideal source of protein, reinforcing outdated and misleading narratives that plant-based foods are nutritionally inferior. In reality, plant-based proteins are nutritionally complete and already foundational to many of the world’s healthiest diets.

Major fast-food chains illustrate how recent protein messaging remains deeply tied to animal products:

- McDonald’s has prioritized larger, meat-heavier offerings such as the Double Big Mac and chicken-focused product launches, with menu positioning emphasizing protein content.
- Chipotle Mexican Grill actively markets add-ons like “double protein” and introduced [a new protein menu](#) emphasizing animal-based options.
- Taco Bell introduced its [Cantina Chicken menu](#) as a major protein-focused platform, despite having one of the industry’s most adaptable plant-based menus.
- Several coffee chains have added [a “Protein Milk”](#) option for all their customizable drinks.

While plant-based proteins have long been an integral part of many of the world’s healthiest diets, they remain underrepresented in cultural conversations focused on individual macronutrients – like protein. How prominent brands design and message their menus significantly impacts how certain foods are normalized and accepted.

A more holistic approach is needed and would further support championing plant-based foods. Fiber, for example, is a [nutritional component](#) increasingly [recognized](#) as lacking in American diets. Promoting entrees that incorporate high amounts for fiber- and protein-rich plant ingredients, such as lentils and chickpeas, would greatly expand choice and promote healthier, more sustainable eating habits.

Ultra-Processed Foods and Plant-Based Options

Plant-based foods are sometimes criticized for being “ultra-processed,” particularly meat alternatives like the Impossible or Beyond Burger. While these products do undergo processing, they remain important tools for expanding plant-based protein options and increasing accessibility for consumers. At the same time, minimally processed plant proteins, such as lentils, chickpeas, beans, tofu, and tempeh, offer nutrient-rich alternatives that can be incorporated into menus for additional variety.

The majority of menu items at U.S. chain restaurants are themselves ultra-processed, relying heavily on refined carbohydrates, additives, and highly processed animal proteins. Meaningful change requires diversifying the types of plant-based proteins offered, including both processed and whole-food options, and expanding plant-based by default items.

Framing plant-based foods as a spectrum—from processed alternatives to minimally processed whole foods—can help normalize plant-forward eating while addressing common misconceptions. Expanding the variety of plant-based proteins supports consumer choice, improves nutritional quality, and reduces reliance on environmentally intensive, factory-farmed animal products.



Impacts of Meaningful Change






When restaurants adopt meaningful meat-reduction policies and integrate plant-based options into their menus, they play a crucial role in alleviating the immense suffering endured by billions of animals in factory farms, decreasing food-related emissions, and protecting the environment. Beyond these ethical and environmental benefits, plant-based options are also economically viable and increasingly profitable.

Nearly six in ten households purchase plant-based foods.

The U.S. retail plant-based food market reached **\$8.1 billion in 2024**, with nearly six in ten households purchasing plant-based foods. Plant-based milk alone now accounts for roughly 14% of total milk sales, highlighting the commercial opportunity of normalizing plant-based options. Consumers, particularly younger generations, are highly receptive to plant-based meals when offered as defaults, signaling both a business and sustainability advantage for companies that prioritize plant-forward menus.

By expanding plant-based entrees, normalizing them as the default, and integrating them into core offerings, restaurants can simultaneously drive revenue, reshape consumer expectations, and support a more sustainable and humane food system.

Individual Restaurant Rankings

Category	Restaurant	Score	Grade
 Burger Breakdown	McDonald's	0	F
	Burger King (RBI)	55	C
	Wendy's	0	F
	Sonic Drive-In (Inspire)	0	F
	Carl's Jr./Hardee's	0	F
 Chicken Check	KFC (Yum!)	0	F
	Popeyes (RBI)	20	F
	Chick-fil-A	0	F
	Wingstop	0	F
	Raising Cane's	0	F
 Coffee Critique	Starbucks	115	B
	Dunkin' (Inspire)	40	D
	Tim Hortons	35	D
	Dutch Bros	35	D
	Peet's	105	B
 Sandwich Scrutiny	Subway	10	F
	Arby's (Inspire)	0	F
	Jimmy John's	10	F
	Jersey Mike's	10	F
	Panera Bread	50	D
 Mexican-Inspired Matchup	Taco Bell	55	C
	Chipotle	120	B
	Moe's Southwest Grill	40	D
	Del Taco	5	F
	Qdoba	40	D

Summary of Rankings

This report ranks 25 of the top US restaurant chains across five popular categories: burgers, chicken, sandwiches, coffee/beverage, and Latin/Mexican-inspired. Evaluating restaurants in this manner enables companies to easily see how they compare to their most direct competitors.

Burger Breakdown



The burger category continues to show minimal progress toward meaningful plant-based integration. Burger King remains the only chain earning above an F, maintaining a C, though its score decreased slightly since 2024. While Burger King continues to offer the Impossible Whopper and briefly introduced new Impossible-based sandwiches in 2024, none are plant-based by default, and promotional emphasis has fluctuated. Globally, its parent company, RBI, has demonstrated stronger plant-based ambition than its U.S. operations.

McDonald's, Wendy's, Sonic Drive-In, and Hardee's/Carl's Jr. all received an F (very poor progress). McDonald's confirmed in 2024 that it has no plans to expand the McPlant nationally after limited U.S. trials. Wendy's has not introduced any new plant-based items in the U.S., and Sonic still lacks any certified vegetarian or vegan entrée. Hardee's and Carl's Jr. have fully discontinued their Beyond Burger offerings, resulting in a further decline from their already-failing 2024 performance.

Overall, the burger segment has either stagnated or regressed since 2024, with no movement toward plant-based-by-default structures.

Chicken Check



The chicken category remains the lowest-performing segment in the report, with all chains receiving an F (very poor progress). Several companies saw slight score declines compared to 2024.

KFC and Popeyes both experienced minor score drops, reflecting the absence of permanent plant-based chicken options on U.S. menus. While Yum! Brands continues to reference global partnerships to explore plant-based proteins; no new KFC plant-based entrée has launched domestically. Popeyes' plant-based sandwich, introduced internationally, has not reached U.S. consumers.

Chick-fil-A, Wingstop, and Raising Cane's continue to receive Fs, with no new plant-based options added nationwide. Chick-fil-A's limited cauliflower sandwich test did not translate into a permanent plant-based entrée, and the broader chicken segment remains overwhelmingly animal-protein centric.

Despite years of industry testing, availability of products, and consumer curiosity about plant-based chicken, no brand in this category has adopted plant-based-by-default integration.

Coffee Critique



The coffee category demonstrates the most measurable improvement since 2024. Most notably, Starbucks improved from a C to a B (making progress), reflecting its removal of the non-dairy milk surcharge and the introduction of its first permanent warm vegan lunch entrée in 2025. Dunkin' improved from an F to a D after eliminating its plant-based milk surcharge in 2025, aligning with industry peers. Dutch Bros also moved up into D territory, similarly driven by removing nondairy upcharges. Tim Hortons declined slightly but remains in the D range, while Peet's continues to earn a B, maintaining its permanent plant-based breakfast sandwich and strong dairy-free beverage program despite a slight score decrease.

Sandwich Scrutiny



The sandwich category reflects mixed but modest movement since 2024. Panera Bread saw the most notable improvement, moving from an F to a D. However, its recent menu revamp focused primarily on meat and dairy additions, with no permanent expansion of plant-based proteins.

Subway experienced a significant grade decline, from a D to an F, reflecting reduced emphasis on plant-based positioning and the absence of new meatless protein introductions. Jimmy John's and Jersey Mike's saw slight score increases but remain in F territory and continue to lack a dedicated vegan protein option. Arby's remains at an F, maintaining its explicit rejection of plant-based meats.

Overall, while a few brands saw marginal upward movement, the category still lacks meaningful structural progress toward plant-based-by-default menu design.

Mexican-Inspired Matchup



The Mexican-inspired category continues to perform strongest overall but shows signs of stagnation. Chipotle maintains a B (making progress), though its score declined slightly since 2024. While it continues to offer softitas as a permanent plant-based protein, it has not introduced new plant-based innovations or moved toward default integration.

Taco Bell improved from a D to a C, reflecting incremental progress and continued experimentation with proprietary plant-based proteins. However, no nationwide plant-based entrée has been permanently added to U.S. menus.

Moe's and Qdoba remain in the D range, relying primarily on customizable beans and vegetables rather than dedicated plant-based protein offerings. Del Taco remains at an F, having removed its previously promoted Beyond Meat items and reversing earlier plant-based gains. While customization keeps this category more adaptable than others, meaningful plant-based-by-default implementation remains absent.

Conclusion

Two years after the [2024 Moving the Menu report](#), the restaurant industry's progress toward a plant-based-by-default future remains limited. While there have been incremental improvements—most notably within the coffee category through the elimination of non-dairy milk surcharges—core entrée categories such as burgers and chicken have largely stagnated or regressed. The structural changes necessary to shift menu defaults away from animal protein have not materialized at scale.

Shifting toward a plant-based and innovative food system remains critical for protecting the planet's resources, reducing greenhouse gas emissions, and equitably feeding a growing global population. Yet the findings of this 2026 report demonstrate that few of the largest U.S. restaurant chains have diversified or improved their menus in a sustained way; fewer still have embedded plant-based options as defaults, and none have set the clear, measurable meat-reduction goals that are critical to align with climate and sustainability commitments.

The continued failure to adopt plant-based-by-default models represents a material risk to these companies and their stakeholders. As climate pressures intensify, supply chains face increasing volatility, and public awareness of food system harms grows, incremental change will not be sufficient. Restaurants must move beyond testing and token offerings and commit to a structural menu design that centers plant-based foods as the norm. By continuing to sanction the expansion of factory farming, restaurant chains are bringing us to a point of no return, threatening our climate, biodiversity, and public health.

The path forward is clear. A more compassionate, resilient, and sustainable food system is within reach—but it requires bold leadership. It is time for restaurant chains to translate operational feasibility into meaningful transformation and step forward as leaders in building a food future that works for animals, people, and the planet.





Recommendations

To advance on all issues evaluated, companies must:

- Position plant-based menu items as integral to achieving their broader sustainability goals;
- Invest in creating, adding, and promoting new plant-based by default menu items; ensure that these options are permanent and widely available.
- Set a public commitment to reduce the amount of animal products purchased by 25% by 2030, using 2020 volumes as a baseline;
- Adopt benchmarks for measuring progress and report annually on progress toward meeting sourcing and sustainability commitments.
- Identify opportunities to incorporate additional animal-free innovations into their supply chain, including emerging fermentation and cell-cultivated products.

Get involved with our free toolkit!

Your voice matters in the movement toward a more humane and sustainable food system. Use [our advocacy toolkit](#) to make a difference for animals and help drive meaningful change in the food industry. This toolkit empowers you to engage directly with the top US restaurant chains and provides resources such as customer comment forms, corporate phone numbers, and templates for posting on social media.



Appendix A: Scoring Approach and Methodology

We assessed each company using the same scoring and methodology as the 2024 Moving the Menu report. We used publicly available information from the company, including websites, policy statements, annual reports, and press releases. Companies were notified via email of the full scoring methodology and the results of our initial assessments and were given the opportunity to respond. Companies were given grades ranging from A (leading on progress) to F (very poor progress).

For the purposes of this scorecard, we define a plant-based product as a manufactured food item that does not contain any animal ingredients and is promoted as a suitable, direct replacement for a main menu item that would conventionally contain animal products.

A maximum of 220 points were available across different criteria focused on the availability of plant-based options, the percentage of the menu that was plant-based by default, the price parity of plant-based options, plant-based commitments made by the company, and advocacy for a shift towards plant-based diets.

Grades and Descriptors

Criteria	Plant-Based Menu	Public Plant-Based Commitments	Advocacy
Grade A (Leading on Progress)	5+ plant-based items. 40% of the menu or more is plant-based by default. Price parity in plant-based items.	Public time-bound commitment to increasing plant-based proteins by specific percentages. Commitment to decrease animal protein.	Public facing materials (social media, marketing, reports) advocate for plant-based products. Benefits of plant-based diet acknowledged in CSR/ESG reporting. Participation in external events centered around plant-based diet.
Grade B (Good Progress)	3-4 plant-based items. ~25% of menu is plant-based by default. Plant-based options have a small price difference.	Meaningful public commitment to procurement of animal/plant-based products. Mention of animal protein purchasing.	Benefits of plant-based products and impacts of existing plant-based products acknowledged in CSR/ESG reporting. Promote plant-based products on social media/public materials.
Grade C (Making Progress)	1-2 plant-based items. Some percentage of menu plant-based by default. Plant-based options have a large price difference.	Express interest in increasing plant-based products without timeline or a clear percentage. No mention of animal protein purchasing.	Have promoted plant-based products. Acknowledge consumer interest in plant-based
Grade D (Little Progress)	Some plant-based items that must be modified, not plant-based by default.	Language in parent company reporting acknowledges benefits of plant-based products but without any clear commitment.	Some language refers to the benefits of plant-based products or environmental impact of animal protein.
Grade F (Very Poor Progress)	No plant-based items.	No time-bound commitments to increasing plant-based products or meat reduction. Fails to commit to plant-based product increase or meat reduction.	No acknowledgment of plant-based diets or products in any materials.

Appendix A (cont.)

Full Scoring Breakdown

Category	Criteria	Points Available
Number of Plant-Based Menu Items	5 or more plant-based items	20
	3-4 plant-based items	15
	1-2 plant-based items	10
	Some items can be fully plant-based with simple modification	5
	0 plant-based items	0
Percentage of Menu Plant-Based	50% or more plant-based by default	20
	25-40% plant-based by default	15
	Less than 25% plant-based by default	5
	None	0
Price Parity in Plant-Based Items	No upcharge for plant-based substitutions or items	25
	Upcharge in price for plant-based substitutions or items	0
Public meat/dairy reduction commitment	Timebound commitment to reduce meat/dairy by 50% or more	25
	Timebound commitment to reduce meat/dairy by 25% or more	15
	Public statement made in support of meat/dairy reduction	5
	Limited or no public commitment	0
Animal protein purchasing decreased 2020-2022	Company has indicated publicly that total animal protein purchases have declined since 2020	25
	No indication of decrease in protein purchasing	0
Public commitment to plant-based offering	Commitment exists	25
	Limited or no public commitment	0
Company advocates for plant-based diets	Public advocacy for plant-based diets through participation/sponsorship in plant-based events	20
	Public-facing materials, info, and social media posts support plant-based diets	20
	Public acknowledgment of the benefits of reducing meat/dairy consumption through marketing, resources, etc.	20
	Public acknowledgment of the benefits of plant-based eating through marketing, resources, etc.	20
Total Available		220