BORD BIA Thinking House

empathy

Dietary Lifestyles

February 2021

Overview of Report

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2. Research Objectives & Methodology
3. Macro themes
4. Food Lifestyles & Choices

- How behaviour is changing
- Who is driving it
- Motivators

5. What's on our plate?
6. The Alternative market
7. Key Challenges
8. Opportunities

Research Objectives

This research project was commissioned and designed to help understand the motivations affecting current food choices and diets, while also identifying the opportunities for the future.

With the behaviours of consumers in relation to their diet evolving and changing at pace in many markets, it was important to understand the dynamics in the category at a total level and specifically the role played by protein and alternative proteins.

The research sought to build upon previous research conducted on this subject in 2018 but was cognisant of the fact that there have been significant societal changes over this short period of time.

The central aims of the research were to

- ✓ Develop **a segmentation** to highlight the different needs and behaviours when it comes to food consumption
- ✓ Provide a **clear understanding of the motivations in adhering to specific dietary lifestyles**
- ✓ Highlight any **differences in perceptions** of different proteins and diets
- ✓ Detail **how well different diets are understood** and how this understanding affects the category overall
- ✓ Allow **the Irish food and drinks industry to grow and innovate** through a more detailed understanding of the category

Research Methodology

The foundation for this project was a robust global quantitative study. This allowed for rigourous, in-depth analysis in each of the key markets of interest.

We conducted **N=2,000+ online interviews in 9 key markets** (Ireland, UK, Germany, Sweden, US, Italy, France, The Netherlands and China).

The final sample size achieved for this project was: N=18,591. Fieldwork was conducted in November 2020.

Research is nationally representative of adults in each market.

Secondary research was also conducted using the Bord Bia library.

Our Research Partners

For this Dietary Lifestyles study we partnered with Empathy, a strategic research consultancy with global expertise based in Ireland.

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Data Sources Bord Bia Thinking House Library

CANVAS8

MINTEL

GlobalData.

The Economist

FMCG GURUS
Consumer Experts, Insight Driven

FOOD navigator.com

IGD

FT FINANCIAL TIMES

EUROMONITOR INTERNATIONAL

Macro Themes

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Key influences on dietary lifestyle are being driven by 5 Macro Themes.

1. Health

Increased focus on physical health

Increased focus on mental health

2. Back to Basics

Shorter Ingredients lists

Natural Products

3. The Environment

Carbon footprint, use of plastics

Animal Welfare & Local/Provenance

4. COVID-19

Physical Health Concerns

Immunity boosting

5. Identity

Opening up of mindsets in how we associate with food

Increased inclusivity

Balance underpins these themes

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Macro Theme #1 Health

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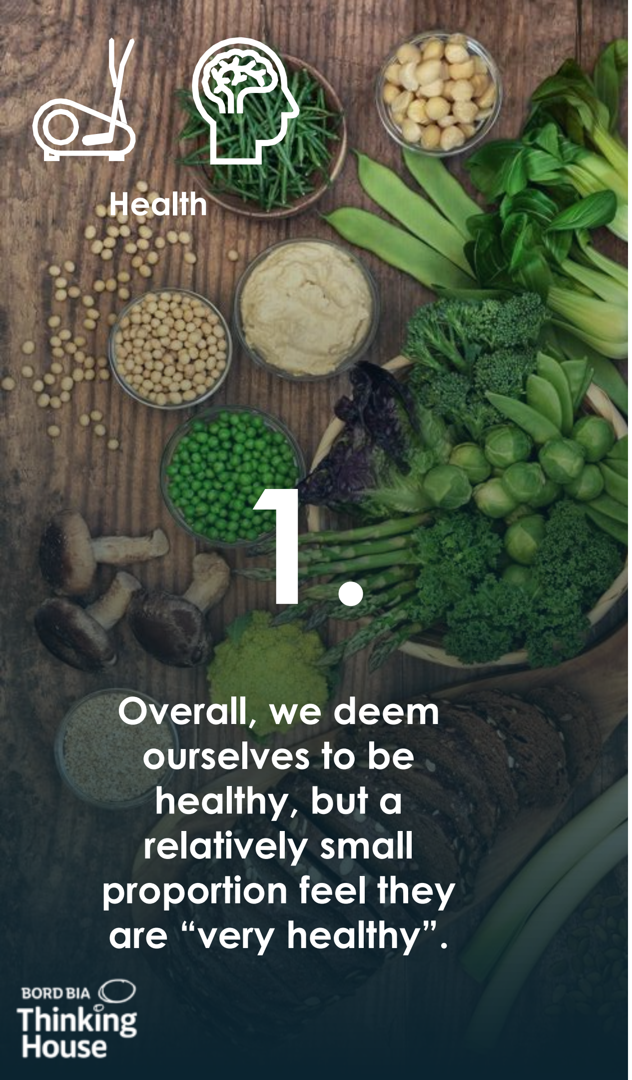
Health
1.
Overall, we deem ourselves to be healthy, but a relatively small proportion feel they are “very healthy”.
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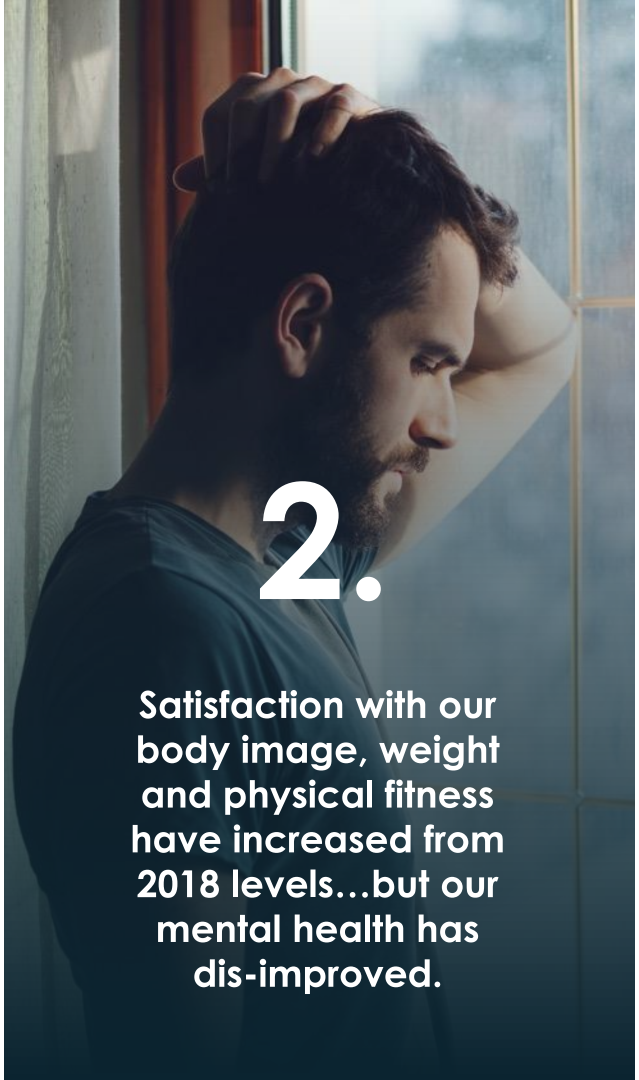
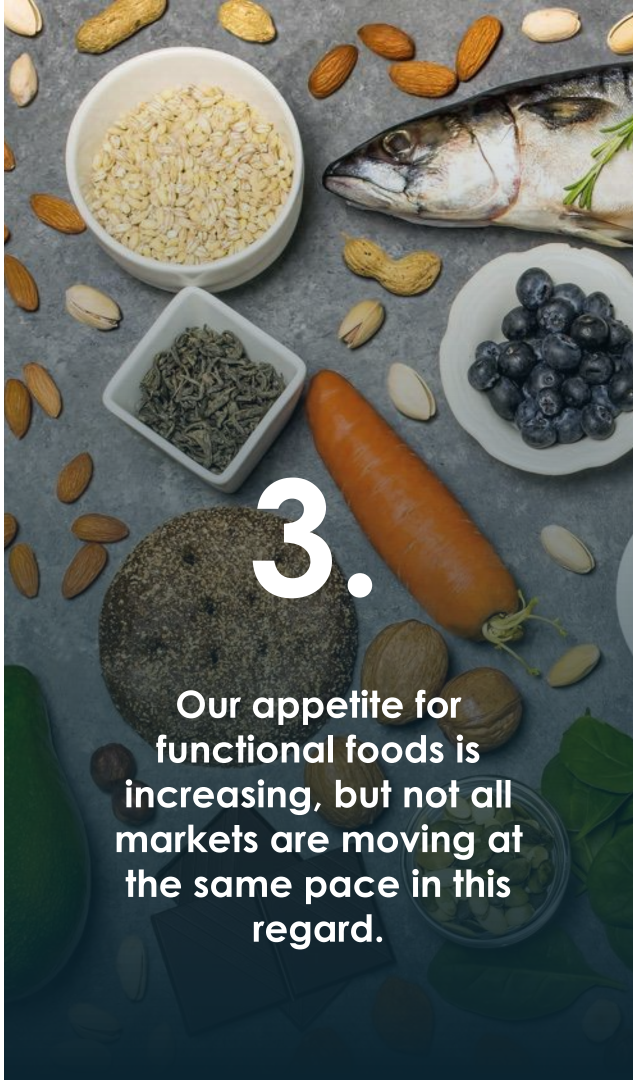

2.
Satisfaction with our body image, weight and physical fitness have increased from 2018 levels…but our mental health has dis-improved.


3.
Our appetite for functional foods is increasing, but not all markets are moving at the same pace in this regard.

Health

€354bn

The value of the Health & Wellness food and drink products in our 9 key markets.

+4% CAGR over last 5 years (2014-2019)

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Source: Euromonitor Country Health & Wellness Reports January 2020

Health

81%

of adults deem themselves to be healthy/very healthy

-3%

The drop in satisfaction with our mental health since 2018

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(Base: All Adults aged 18+ n=18,591)

Health

We are making more of an effort to eat healthily and exercise than we were 12 months ago.

64%

Are making an effort to eat more healthily

56%

Are making an effort to exercise more

(Base: All Adults aged 18+ n=18,591)

Functional foods continue to show strong growth

Health

% Agree

I seek out food and drink with immune boosting benefits

24%

+28% (China)
+7% (Italy)

The health benefits of a food are more important than how it tastes

23%

+28% (China)
+15% (Italy)

I seek out food and drink with added vitamins or minerals

17%

+22% (China)
+7% (USA)

I seek out food and drink with added protein

14%

+19% (China)
+9% (USA)

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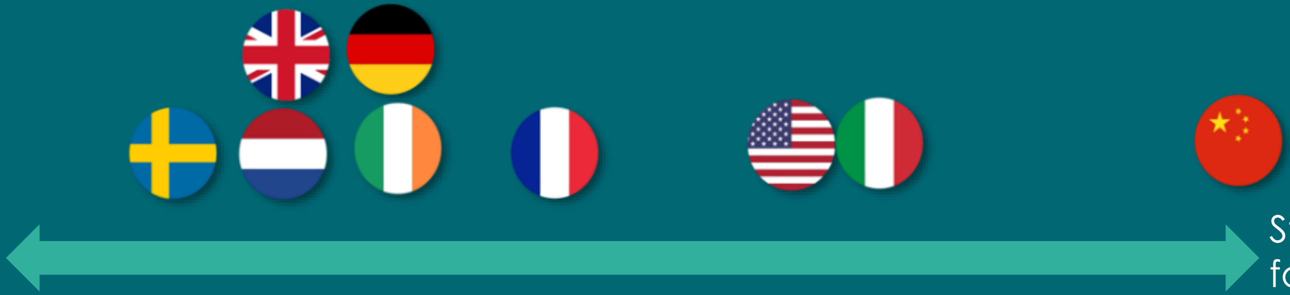
(Base: All Adults aged 18+ n=18,591)

However, some markets are ahead of others in their desire for foods with added benefits

Health

Weak desire for food with added benefits



Strong desire for food with added benefits

With the exception of Italy, European markets do not match the desire for food with added benefits to the same degree as we record in the US and particularly China.

(Base: All Adults aged 18+ n=18,591)

Macro Theme #2
Back to Basics

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Back to Basics

1.

The desire for food which is natural is clearly evident in our decision making process. Food which is low in salt, sugar and fat are also key in our decision making process

2.

Shorter ingredients lists on products are a key motivator of choice, with this desire more in evidence in Western European Markets

Back to Basics

45%

Like to cook food from scratch

That our food is free from additives and preservatives and how natural the food is are the 3rd & 4th biggest drivers of choice when it comes to the food we consume

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Back to Basics

Consideration for clean and natural food choices is more prevalent in markets that place a priority on provenance

% Agree

I like to cook from scratch

45%


+6%


+5%

Where possible I always look for the most natural products I can buy

37%


+15%


+8%

I prefer to choose food and drink products with shorter ingredients lists

28%


+3%


+3%


+3%

I will purchase organic food whenever possible

26%


+20%


+9%

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(Base: All Adults aged 18+ n=18,591)

Macro Theme #3
The Environment

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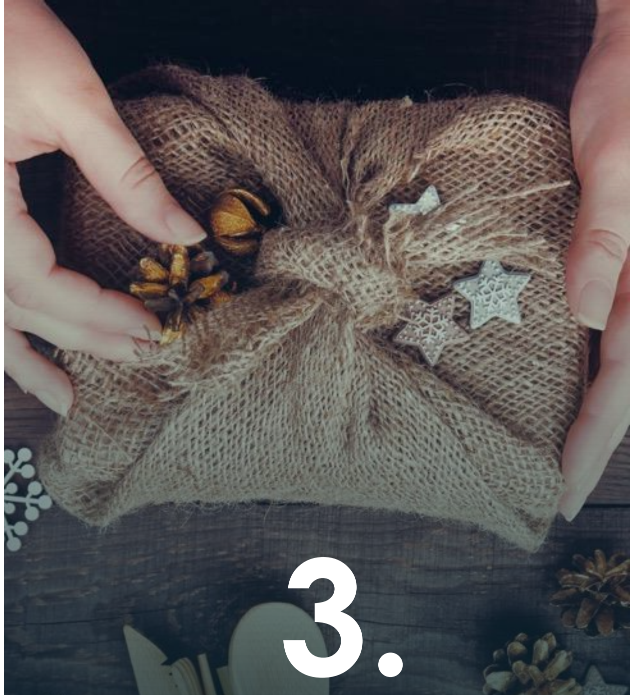
The Environment

1.

The origin and provenance of the food we purchase continues to be an important factor in our decision making process

2.

We are being more mindful of how the decisions we make are affecting our environment, with a conscious decision to reduce our plastic consumption and our carbon footprint evident



3.

A significant proportion of consumers are willing to pay more for food which is sustainably produced

The Environment

65%

are making more of an effort to be more aware of the environment around them

27%

are willing to pay more for food which is sustainably produced

(Base: All Adults aged 18+ n=18,591)

The Environment

There is a continued focus on Local Food & Provenance

% Agree

I pay particular attention where the food I purchase comes from

30%

Italy: +14%

France: +6%

I try and buy food which is produced as close to where I live as possible

28%

Italy: +15%

France: +4%

I have reduced the amount of food I purchase which is not produced locally

20%

Italy: +6%

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(Base: All Adults aged 18+ n=18,591)

The Environment

We are being more mindful of our environment and how we are impacting the environment.

59%

are making more of an effort to reduce the amount of plastic they buy

57%

are making more of an effort to reduce their carbon footprint/care for the environment more
(up significantly from 2018 levels)

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(Base: All Adults aged 18+ n=18,591)

Macro Theme #4
COVID-19

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COVID-19

1.

COVID-19 has had a significant impact on energy levels, levels of fitness, body image and mental health

2.

Almost a third claim to be consuming vitamins and minerals on a daily basis, with boosting immunity the key influencing factor for such

3.

Just over 1 in 5 believe their impact on the environment has improved since COVID-19

COVID-19

COVID-19 has accelerated intentions to eat healthily

Interest in 'preventative' health' is steering consumers towards healthy eating patterns

In China, 71% agree that eating healthily is a higher priority for them since COVID.

36% in US and 34% in Italy

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Source: Mintel Global COVID-19 Tracker

COVID-19

COVID has accentuated the desire for 'protective health'

31% Consuming vitamins and minerals daily

(Base: All Adults aged 18+ n=18,591)

Triggers for Usage are Immunity Driven

(Base: All Adults aged 18+ who consume vitamins & minerals at least monthly n=11,042)

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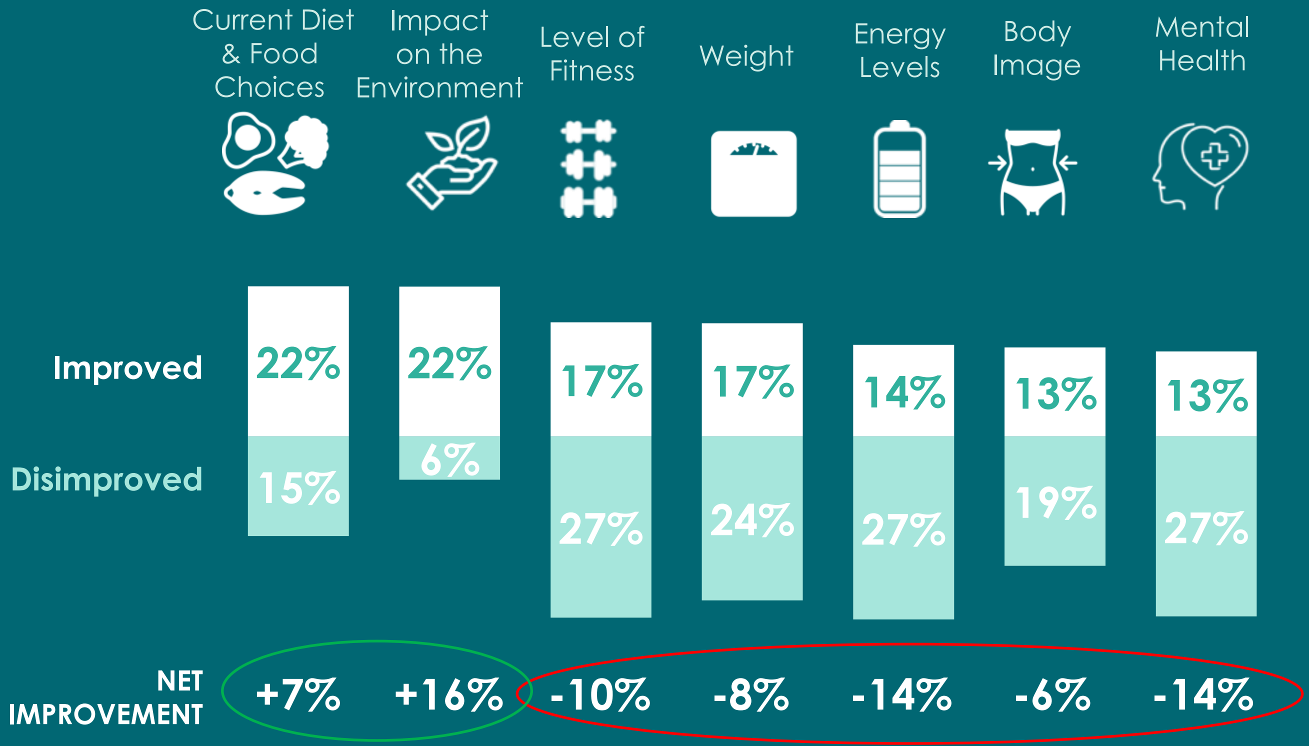
Yet COVID-19 is still taking its toll on our mental and physical wellbeing

COVID-19

While we have made improvements in relation to our food choices and our impact on the environment since COVID-19, our energy levels and mental health are suffering.



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(Base: All Adults aged 18+ n=18,591)

COVID-19

"I see it's all connected - the pandemic and the fact that our environment is changing now"

(Katelyn Culleton, National Youth Assembly on Climate Action, 2021

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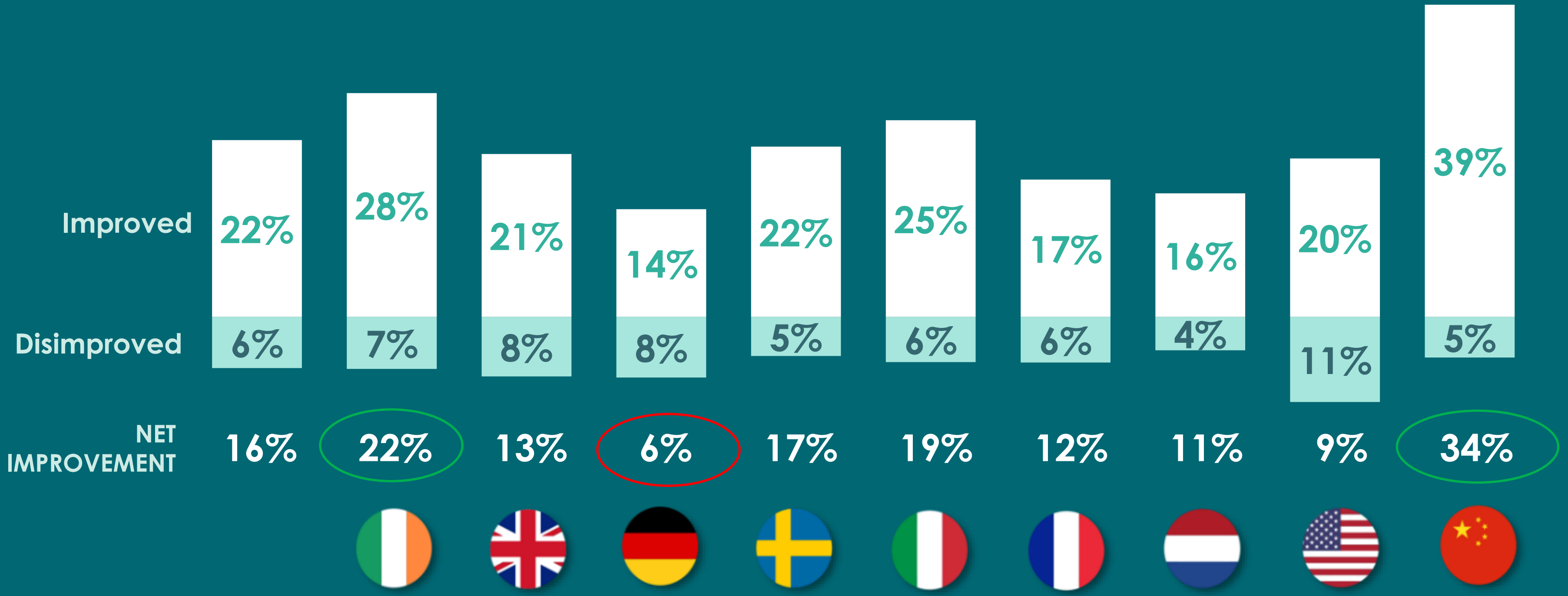
COVID-19

Our Environmental Impact is Improving since COVID...

Impact on the Environment



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(Base: All Adults aged 18+ n=18,591)

COVID-19 has accelerated plant based growth

COVID-19

47%

of global consumers reported that ethically and sustainably sourced ingredients are more important to them than before the pandemic

The retail consumption of meat substitutes has grown by

+8.0%

in 2020, reaching US$5.1bn from US$4.7bn in 2019, outpacing the original pre-COVID forecasts.

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Source: Globaldata – A look at the next generation of plant-based proteins 30th November 2020 - GlobalData's Coronavirus (COVID-19) Recovery Consumer Tracker

COVID-19

In the 12 weeks up to the 6th of June 2020, there was a 109% year-on-year increase in sales of ambient meat substitutes, while sales of fresh meat substitutes were nearly 60% higher!

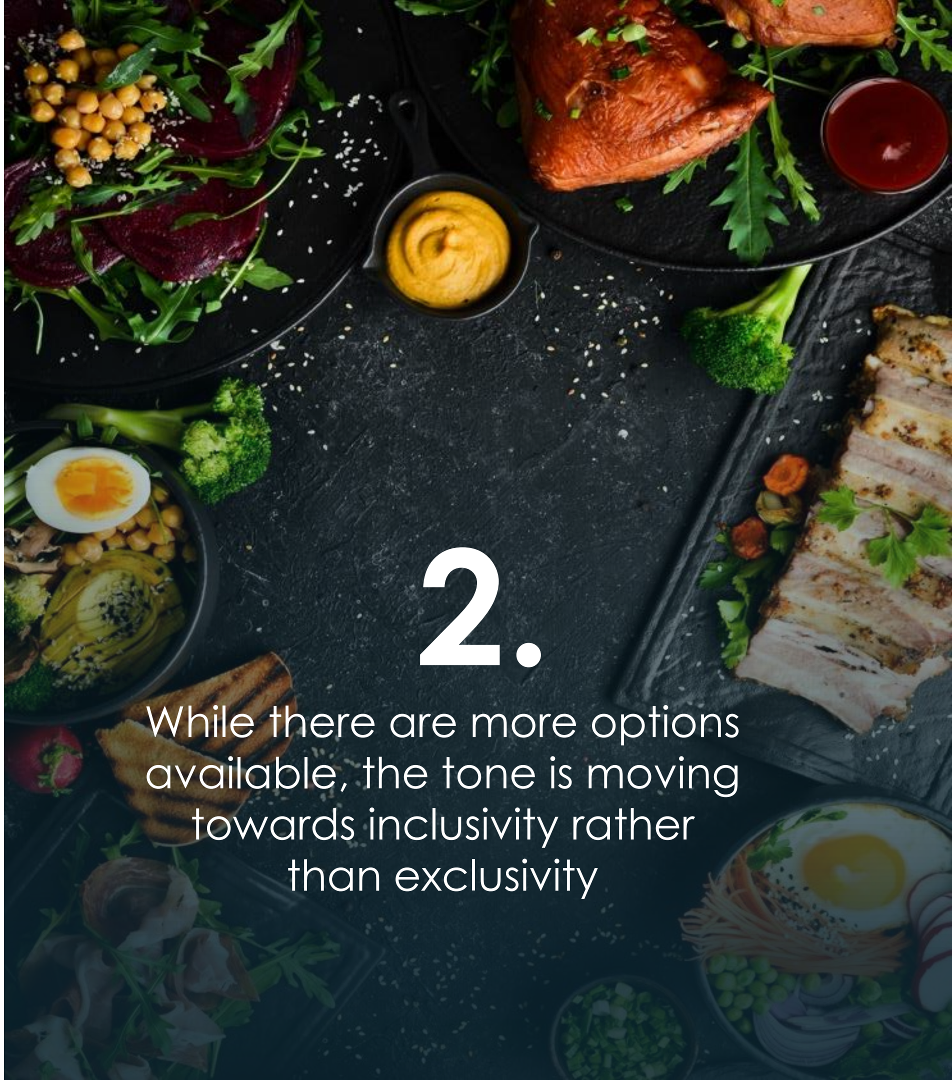
Source: Nielsen Scantrack

Macro Theme #5
Identity

Identity

1.

Diversification of food lifestyles continues at pace. With more options than ever available for consumers, there appears to be less pressure to conform



2.

While there are more options available, the tone is moving towards inclusivity rather than exclusivity

Identity

There is continued fragmentation when it comes to how we describe our food consumption.

We are associating more with a range of different food lifestyles and being less pigeon-holed to a single belief.

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Identity

The social dynamics seem be evolving

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Identity

It's less about perfection and more about being inclusive

Brands that are doing well have been more inclusive

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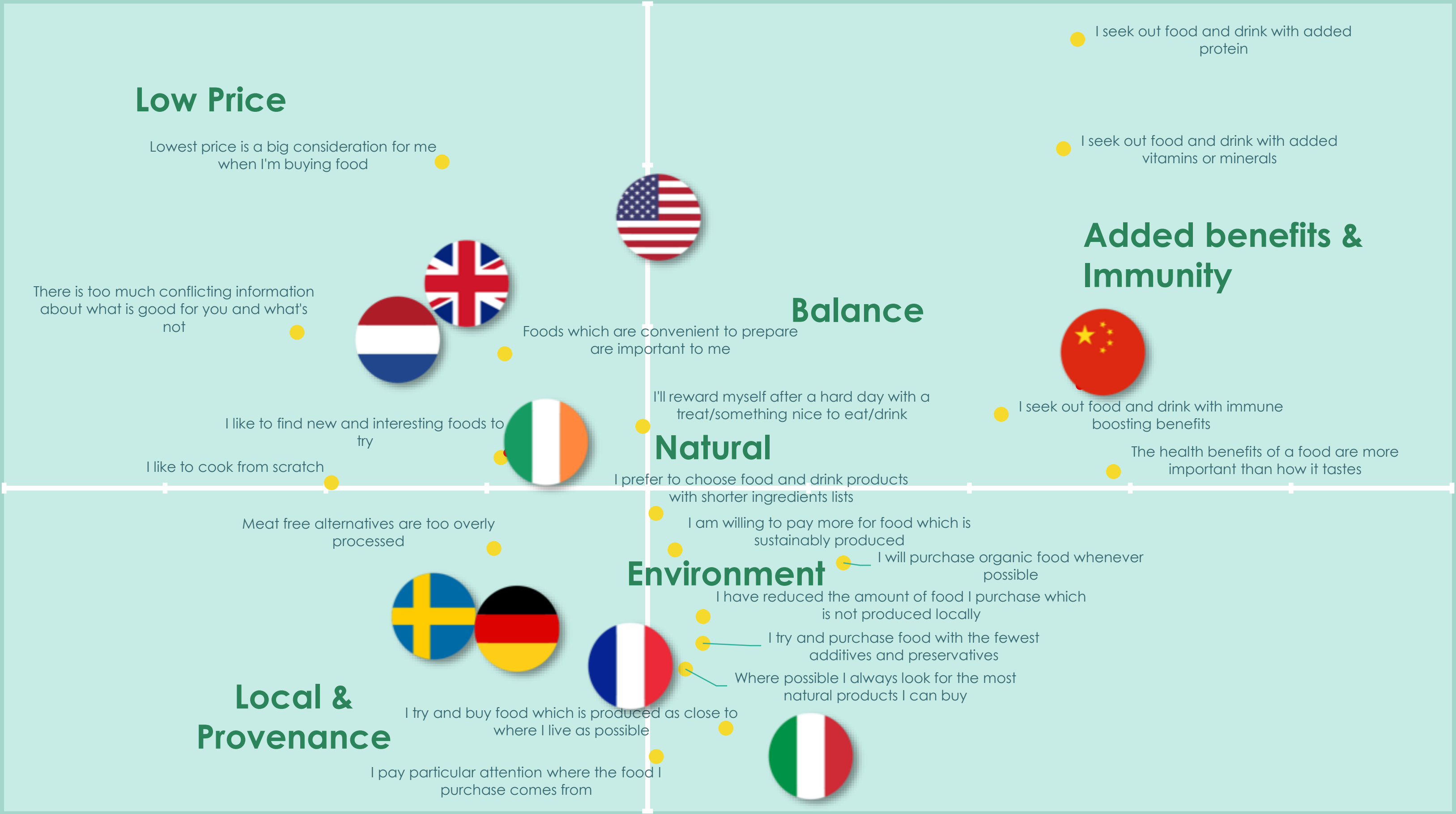
How people prioritize factors shows up differently across markets



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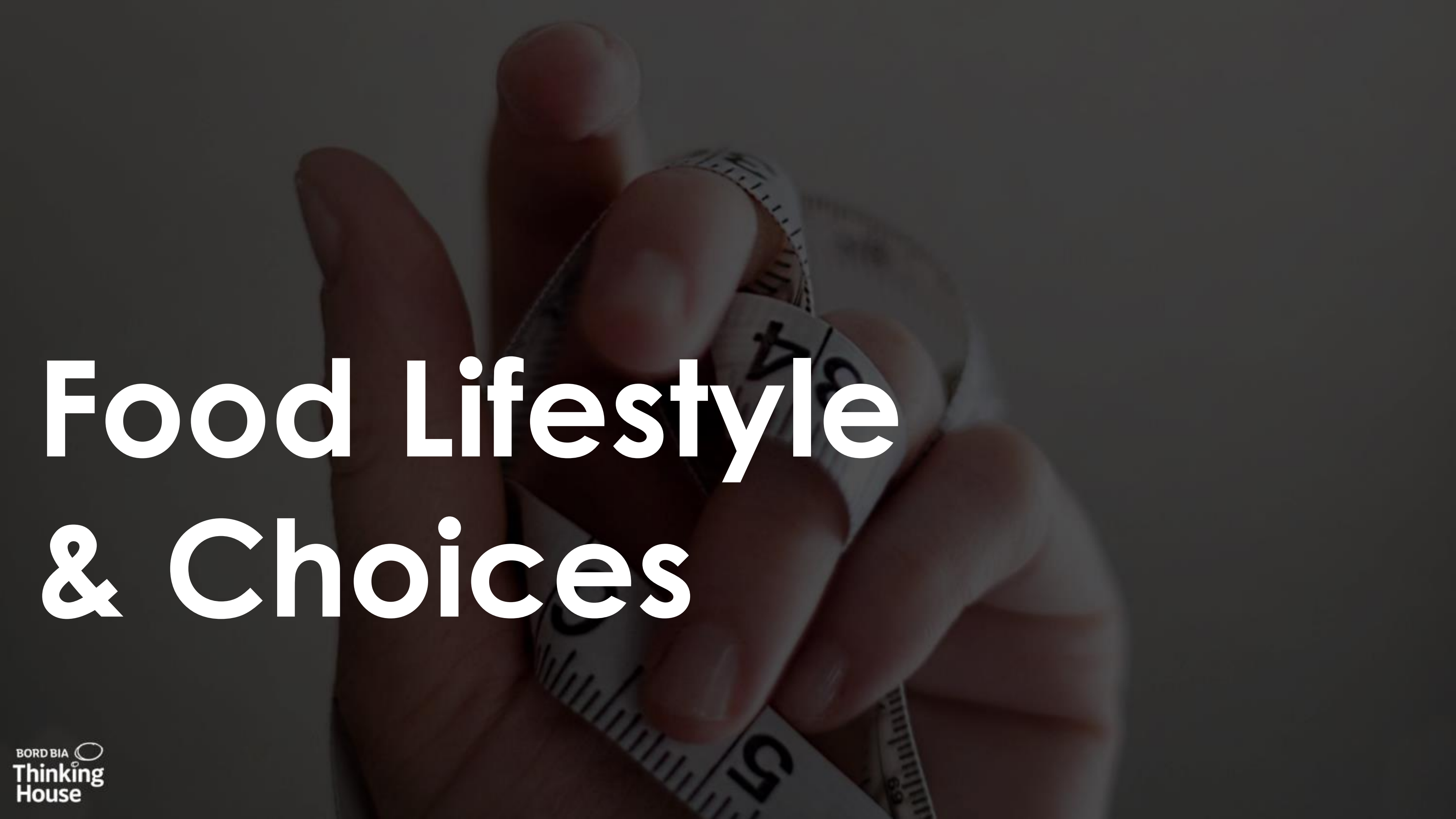
(Base: All Adults aged 18+ n=18,591)



Food Lifestyle & Choices

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How is Behaviour Changing?

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1.

We are moving towards a more balanced outlook when it comes to our food consumption, with a regimented focus in decline as we manage ‘the good’ with ‘the bad’ in terms of the foods we consume

2.

We record a rise in the association with a range of different types of diets, however, we are becoming less disciplined in how we adhere to them

We are moving towards diets which aren’t as restrictive in the choices which need to be made, but at the same time we are behaving more “conscientiously”

3.

There is overlap between those who associate with various dietary lifestyle or diets all or most of the time – with the most significant increase happening in Flexitarianism

70%

of adults don't adhere to any particular diet or food lifestyle

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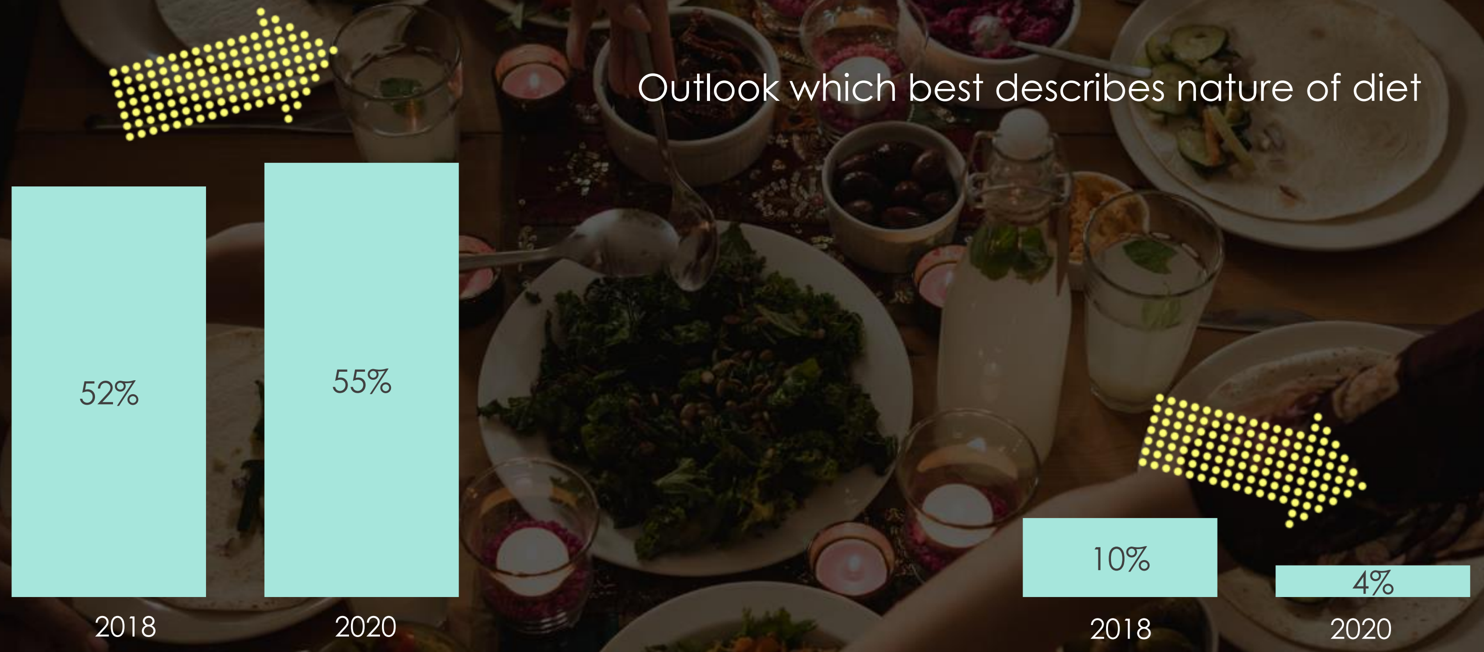
(Base: All Adults aged 18+ n=18,591)

There appears to be a move towards balance and a rejection of stricter regimes



BALANCED
I try to eat a balanced diet, but don't follow a specific diet

FOCUSSED
I follow a specific diet or food lifestyles

BORD BIA Thinking House *(Base: All Adults aged 18+ n=18,591)*

It's more about progress than perfection…

If it's all or nothing… it will be nothing.

% Agree

I'll reward myself after a hard day with a treat/something nice to eat/drink

36%

% Consuming Each Weekly+

95%

91%

69%

68%

High levels of overlap between 'good' and 'bad' food choices

(Base: All Adults aged 18+ n=18,591)

"Association" with a vegan lifestyle has increased, but the proportion adhering to the lifestyle continues to be low.

Vegans

	Association with this type of diet/food lifestyle	Adherence to this type of diet/food lifestyle in terms of food consumption behaviour
2020	14%	2% (Ireland 2%, UK 2%)
2018	5%	1%

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(Base: All Adults aged 18+ n=18,591)

“Association” with a Vegetarian lifestyle increases significantly, but the increase in adherence is more modest.

Vegetarians

	Association with this type of diet/food lifestyle	Adherence to this type of diet/food lifestyle in terms of food consumption behaviour
2020	17%	9%
2018	9%	7%

2020 adherence by country: 8% | 9%

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(Base: All Adults aged 18+ n=18,591)

"Association" in ascendance for Flexitarians, with a high degree of adherence also evident.

Flexitarians

	Association with this type of diet/food lifestyle	Adherence to this type of diet/food lifestyle in terms of food consumption behaviour
2020	24%	19%
2018	14%	12%

Ireland: 16% UK: 16%

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(Base: All Adults aged 18+ n=18,591)

Who are the Different Groups?

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Overview of Vegans

Youngest of the three diet segments and much more likely to be female. Although not as young or as female as recorded in 2018.

However, some signs that they are becoming more prevalent nationwide, with less urban bias than recorded in 2018 and more towards middle incomes.

Male	Female
25%	75%

18-24	25%
25-34	27%
35-44	13%
45-54	16%
55-64	11%
65+	9%

More evenly spread across urban/rural

Drivers of Food Choices

The impact on animals of producing the food

That it adheres to my diet / food beliefs

That the food has a low impact on the environment

How natural the food is

That the food is organic

The food comes in environmentally friendly packaging

(Base: All Adults aged 18+ who follow this diet/food lifestyle n=328)

Overview of Vegetarians

Still quite young relative to the total population, although slightly older than 2018 levels. Just over 6 in 10 are female, in line with the proportion in 2018.

As with 2018, they are more likely to be urban residents and they over-index in high income households.

Male	Female
38%	62%

Age	%
18-24	16%
25-34	23%
35-44	22%
45-54	16%
55-64	13%
65+	11%

More likely to be urban residents

Drivers of Food Choices

The impact on animals of producing the food

How the food tastes

That the food is free from additives and preservatives

How natural the food is

That it adheres to my diet / food beliefs

That the food has a low impact on the environment

(Base: All Adults aged 18+ who follow this diet/food lifestyle n=1,598)

Overview of Flexitarians

Quite similar to vegetarians in terms of age profile but younger than the were in 2018. More equally split in terms of gender than either vegans or vegetarians and this has not changed from 2018.

As with vegetarians, they are more likely to be urban residents (increasing from 2018) and they over-index in high income households.

Male	Female
46%	**54%**

18-24	14%
25-34	21%
35-44	21%
45-54	18%
55-64	14%
65+	12%

More likely to be urban residents

Drivers of Food Choices

How the food tastes

That the food is free from additives and preservatives

How natural the food is

The impact on animals of producing the food

The enjoyment you get from eating that food

That the food has a low impact on the environment

(Base: All Adults aged 18+ who follow this diet/food lifestyle n=3,524)

Why? The Motivations

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Primary Reasons for Adopting a Diet/Food Lifestyle are founded in health…but not for all

While health is a primary motivator for flexitarians, vegans are more driven by environmental concerns

	Flexitarians	Vegetarians	Vegans
1.	Physical	Environment	Environment
2.	Mental	Social	Social
3.	Social	Physical	Physical

(Base: All Adults aged 18+ who follow each diet/food lifestyle)

Environmental motivations appear to be taking greater precedence for vegans

9%

of vegans claim that distinguishing themselves from others was a motivation for them to initially start their food lifestyle.

This was 32% in 2018.

17%

of vegans claim that conversations with friends and family was a motivation for them to initially start their food lifestyle.

This was 35% in 2018.

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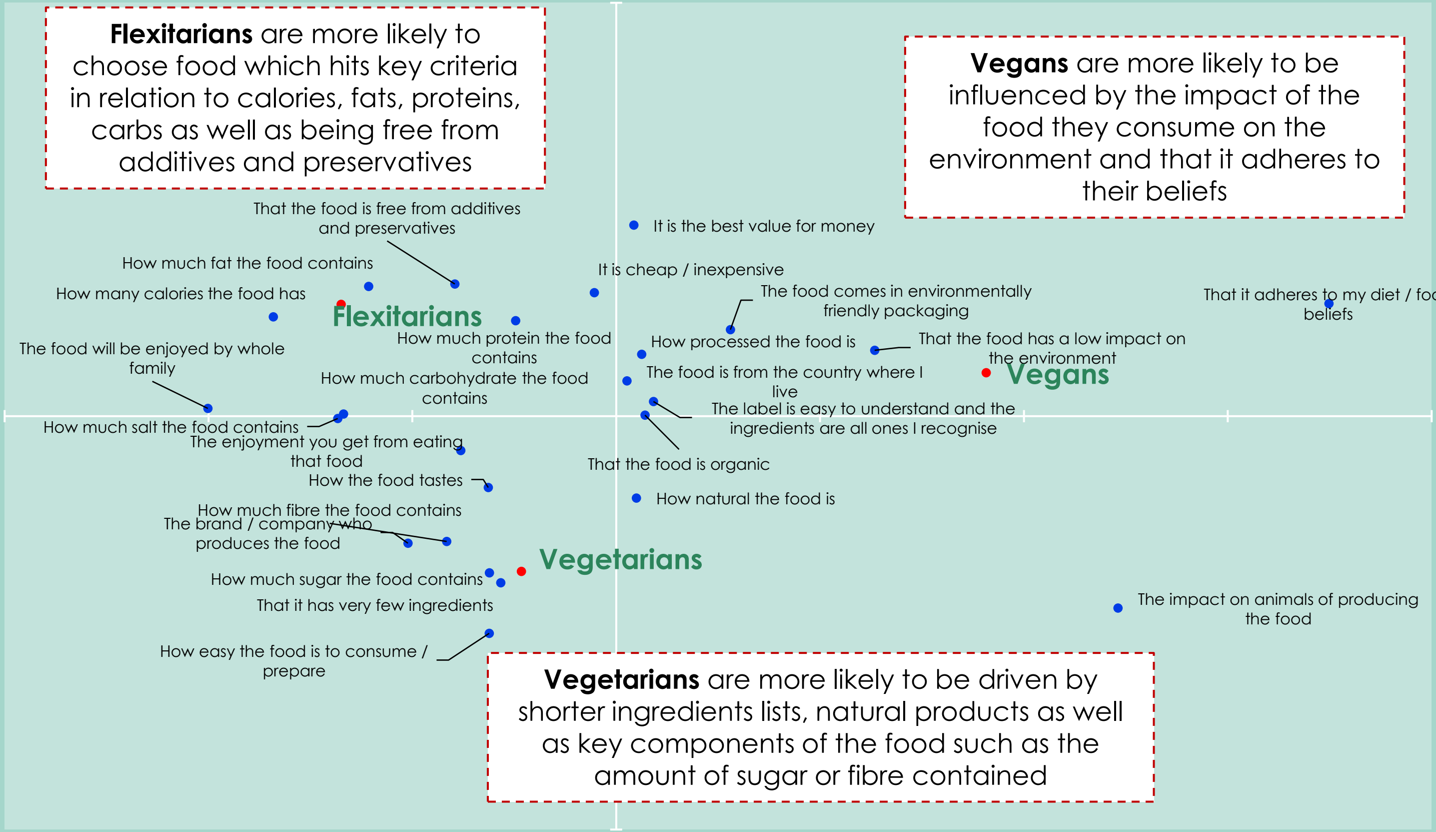
(Base: All Adults aged 18+ who follow each diet/food lifestyle)

Taste & enjoyment are stronger drivers of choice for vegetarians and flexitarians when deciding on which food to consume.

Drivers of Food Choice



(Base: All Adults aged 18+ who follow each diet/food lifestyle)

Environmental & Animal Welfare Considerations are having a significant impact on our food choices, but are least pronounced for Flexitarians.

	Claim that concerns about **animal welfare** had an impact on their desire to adapt their food lifestyle initially	Claim that **environmental considerations** had an impact on their desire to adapt their food lifestyle initially
Vegan	75%	60%
Vegetarian	66%	42%
Flexitarians	36%	32%

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(Base: All Adults aged 18+ who follow each diet/food lifestyle)

What's on our Plate?

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Fruit & Veg has seen significant consumption over the past year.

	VEGETABLES	FRUIT
Weekly or more often consumption	95%	90%
% NET Increased consumption in the Past 12 Months	+30%	+27%

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(Base: All Adults aged 18+ n=18,591)

Poultry consumption levels continue to increase

POULTRY

Weekly or more often consumption

79%

% NET Increased consumption in the Past 12 Months

+11%

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(Base: All Adults aged 18+ n=18,591)

While consumption of Red Meat has declined

RED MEAT

70%

-9%

Reduced consumption evident in Western Europe, with US consumption steady and China increasing

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While we may have recorded reduced consumption of red meat in Western Europe.

There has been no such drop in the US market, with consumption levels consistent over the past 12 months.

Past 12 months consumption is increasing in China.

+11%

Our Beef tracking research shows that European shoppers are buying "less but better quality beef"

Nov – Dec '20
34%
24%
23%
22%
21%
18%
14%

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(Base: All Adults aged 18+ n=18,591)

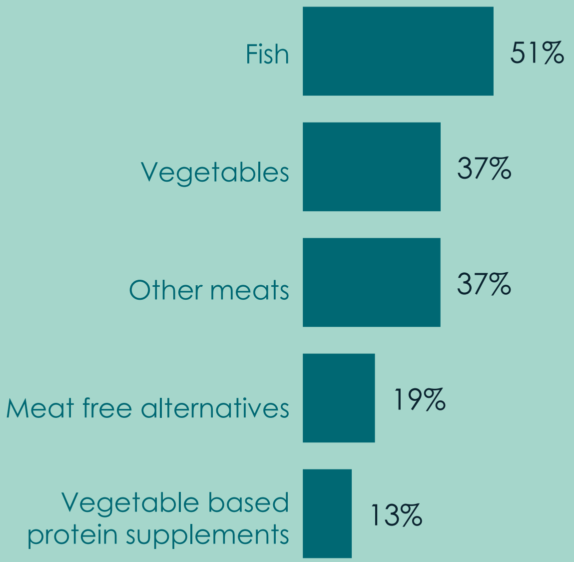
(Source: Bord Bia European Beef Tracker)

In fact, this Dietary Lifestyles study highlights that the consumption of Red meat is still strong across the week, with steak playing a key role for evening meals, particularly at the weekend.

	Start/Middle of Week			End of Week		
Lunch	18%	9%	7%	23%	14%	10%
Evening Meals	28%	33%	23%	35%	45%	33%

(Base: All Adults aged 18+ n=18,591)

Fish is playing a growing role on the plate where people are changing their diet



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(Base: All Adults aged 18+ who have reduced red meat consumption n=4,049)

Meat free alternatives shows growth over the past year

Meat free Alternatives

Weekly or more often consumption

38%

% NET Increased consumption in the Past 12 Months

+8%

(Base: All Adults aged 18+ n=18,591)

Increased consumption in both Dairy and Non-Dairy milk

	Dairy Milk	Non-Dairy Milk
Weekly or more often consumption	77%	27%
% NET Increased consumption in the Past 12 Months	+8%	+12%

(Base: All Adults aged 18+ n=18,591)

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Consumption of Cheese remains high, with increased consumption across dairy and non-dairy in the last year

	Dairy Cheese	Non-Dairy Cheese
Weekly or more often consumption	82%	22%
% NET Increased consumption in the Past 12 Months	+6%	+6%

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(Base: All Adults aged 18+ n=18,591)

Yoghurt category demonstrates strong growth in the past 12 months

	Dairy Yoghurt	Non-Dairy Yoghurt
Weekly or more often consumption	68%	25%
% NET Increased consumption in the Past 12 Months	+10%	+8%

(Base: All Adults aged 18+ n=18,591)

Marginal drop in Butter/Spreads consumption in the past 12 months, with some growth in Non-Dairy versions

	Dairy Butter/Spreads	Non-Dairy Butter/Spreads
Weekly or more often consumption	72%	29%
% NET Increased consumption in the Past 12 Months	-2%	+3%

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(Base: All Adults aged 18+ n=18,591)

Free From/Alternative Market Purchasing Dynamics

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High Level of Purchase and Repeat Purchase Evident in the Free From/Alternatives Market

62%

of all consumers **have purchased a 'Free From/Alternative'** products

67%

of those who have ever **purchased a 'Free From/Alternative'** product claim to purchase 'Free From/Alternative' **products regularly**

(Base: All Adults aged 18+ n=18,591)

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The purchase incidence of Meat Free is slightly ahead of Dairy Free and well ahead of Gluten free

47% have ever purchased “Meat Free”

40% have ever purchased “Dairy Free”

21% have ever purchased “Gluten Free”

25% regularly purchase “Meat Free”

23% regularly purchase “Dairy Free”

8% regularly purchase “Gluten Free”

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(Base: All Adults aged 18+ n=18,591)

Regular Purchase Incidence of Free/From Alternative Products is Significant amongst key groups

	Purchase **'Meat Free/Alternatives'** Regularly	Purchase **'Dairy Free/Alternatives'** Regularly	Purchase **'Gluten Free'** Regularly
Vegan	63%	60%	12%
Vegetarian	51%	42%	11%
Flexitarians	45%	37%	12%
Rest of Consumers	16%	16%	6%

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(Base: All Adults aged 18+ who follow each diet/food lifestyle)

Desire to Purchase is on the Up

85%

of all consumers who purchased a **'Free From/Alternative'** product will purchase one in the future

Consumers who have **NEVER** purchased **a 'Free From/Alternative'** product will purchase one in the future

27%

Of these, 17% claim they will purchase a **'Meat Free Alternative'**, with 14% claiming they will purchase a **'Dairy Free Alternative'** and 4% claiming they will purchase from both categories.

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(Base: All Adults aged 18+ n=18,591)

The Challenges

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Convenience

Convenience remains a significant challenge to following a specific dietary lifestyle

Agree

Foods which are convenient to prepare are important to me

29%

+7%

55%

Found **finding convenience food that suited their diet for snacking/eating on the go** a challenge after initially committing to a diet/food lifestyle

47%

Found **ease of meal preparation** a challenge after initially committing to a diet/food lifestyle

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(Base: All Adults aged 18+ n=18,591)

Convenience

Convenience was a key challenge for **Vegans** when trying to adapt to their new way of eating.

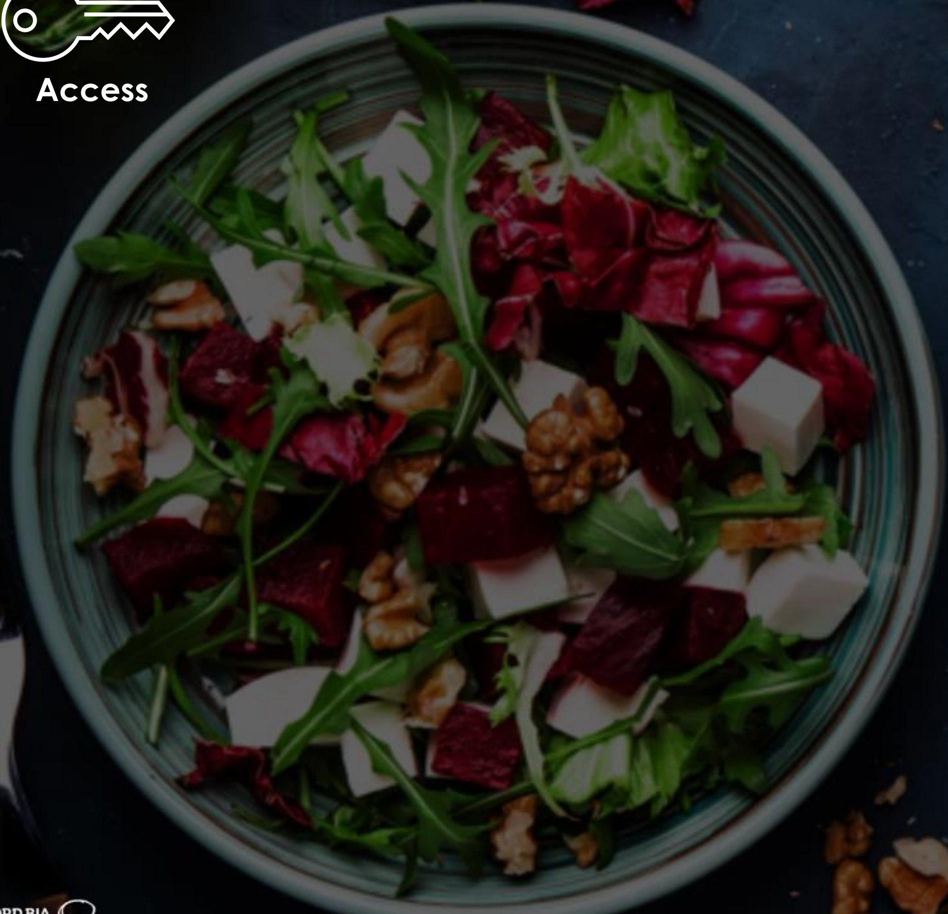
Although ready meals availability and access in general has improved, snacking is still a challenge.

18%

of those who have stopped vegan/vegetarian diets claim they did so because there wasn't enough convenient food options available for them

(Base: All Adults aged 18+ who follow each diet/food lifestyle or who have stopped following a vegan/vegetarian diet)

Access



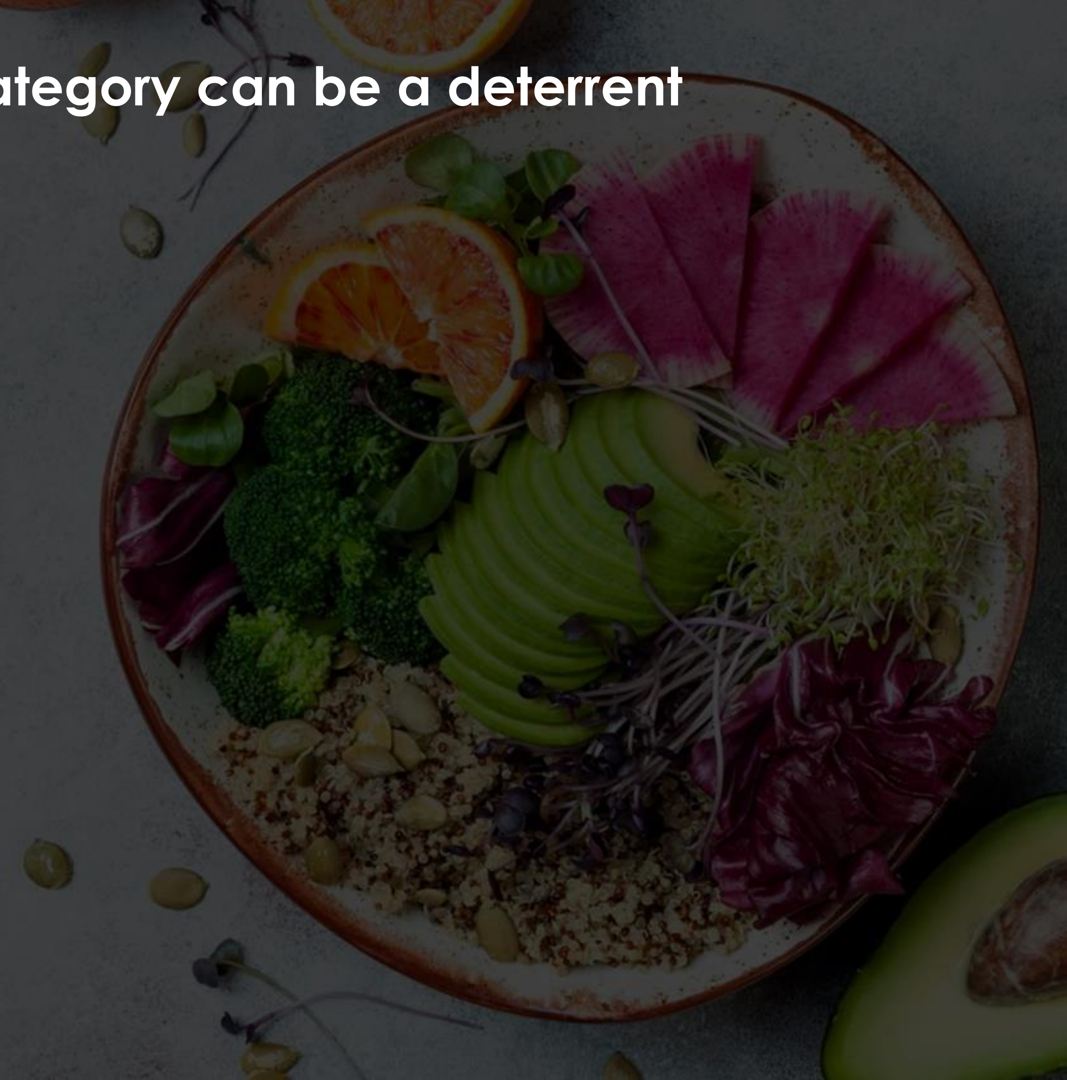
Accessing food which delivers the right nutrients (iron, B12) is also a hurdle for those embarking on a **Vegan or Vegetarian** lifestyle initially.

Added to this there is are still social factors such as travelling, eating out and general perceptions which are challenging.

(Base: All Adults aged 18+ who follow each diet/food lifestyle)

Language in the category can be a deterrent

Comprehension



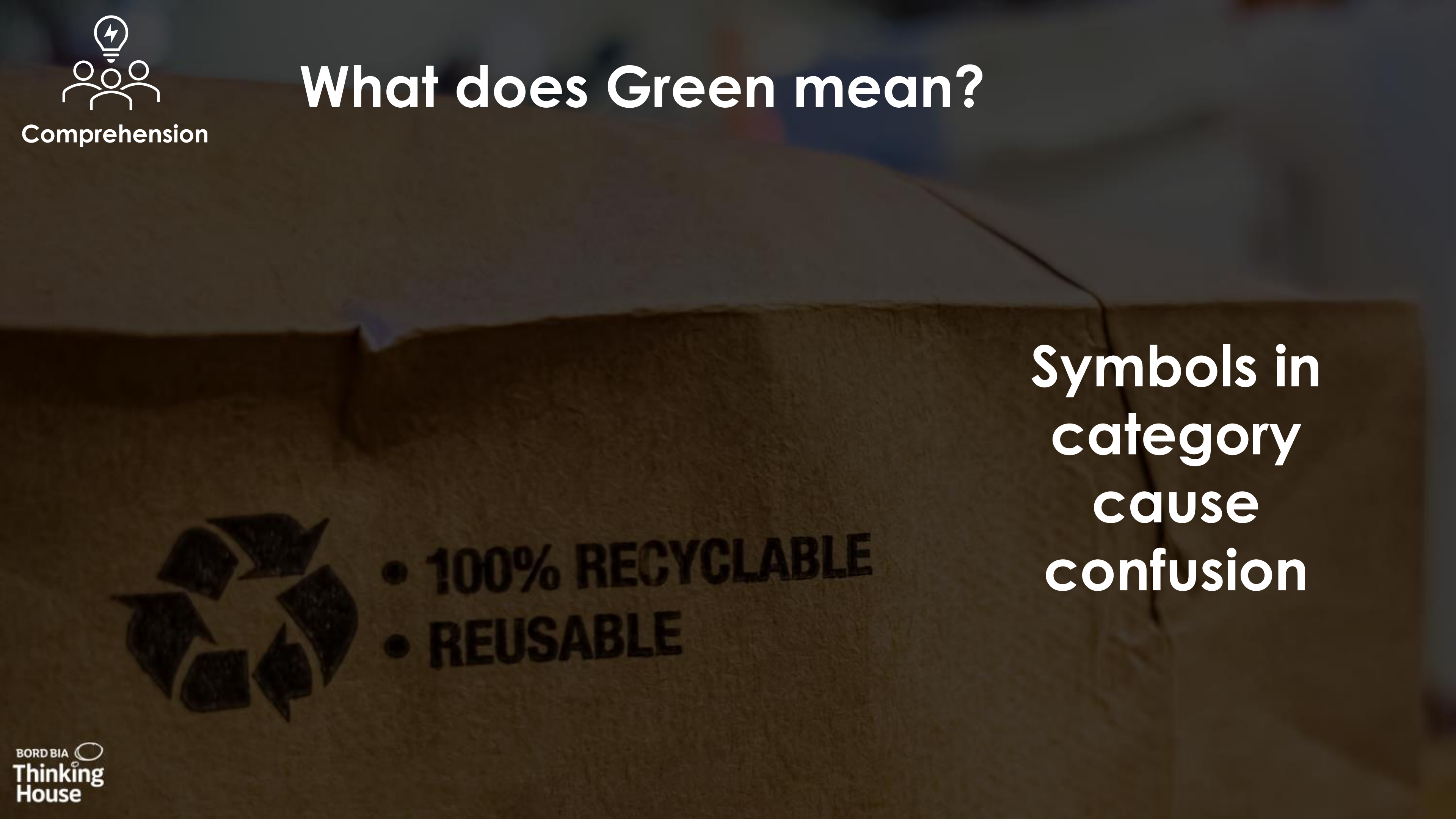
61% of Britons are unlikely to adopt a plant-based diet in 2021- in part because of an education gap when it comes to the meaning of plant-based
BNF

8% do not know what a plant-based diet is at all
BNF

41% say that a plant-based diet means following a vegan diet
BNF

Comprehension

What does Green mean?



Symbols in category cause confusion

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Comprehension

“I barely know what the word sustainable means anymore”

Stella McCartney

Price

Affordability remains a challenge and a reason to exit these diets

Agree

Lowest price is a big consideration for me when I'm buying food

26%

+9%

18%

of those who have stopped following a vegan/vegetarian lifestyle claim they did so because it was too expensive

52%

Found **affording to only buy products that suited their diet** a challenge after initially committing to a diet/food lifestyle

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(Base: All Adults aged 18+ n=18,591, all who follow each diet/food lifestyle or who have stopped following a vegan/vegetarian diet)

Pleasure

Initially, **Flexitarians** can be challenged to ensure their food is delivering for them in terms of nutrients (fats, carbs and proteins etc.)

But enjoyment of food is a big factor for Flexitarians and any switch to meat replacements leads to concerns about taste and texture – ultimately their enjoyment

#1

Driver of food choice is how the food tastes, this is even more pronounced for flexitarians than either vegans or vegetarians.

60%

of Britons still don't see a vegan diet as enjoyable
Sustainability, University of Bath

(Base: All Adults aged 18+ who follow each diet/food lifestyle)

Some consumers question how healthy it is to follow a vegan diet

Health

1

Those who currently follow a vegan lifestyle are most likely to claim that they consume added vitamins and minerals because they don't get enough naturally in their diet.

43% for Vegans

vs. **23%** overall

2

Amongst those who would not consider following a vegan diet key barriers are:

29% believe it is not a healthy balanced/diet

23% are concerned that there would be a loss of vitamins/nutrients

18% believe that they need animal protein to stay healthy

3

Added to this, amongst those who stopped following a vegan diet

22% site their health suffering and

20% site a drop in energy as factors for doing so.

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Health

There are some perceptions that plant-based foods can be too processed

30%

think meat free alternatives are too processed, with almost a quarter (23%) of vegans believing this to be the case

Amongst those who would not consider following a vegan diet

17%

claim this is because meat/dairy free alternatives are overly processed/unhealthy, with vegetarians similarly aligned in this regard (15%)

There are also some question marks in relation to transparency of Plant-Based products.

1 in 10

claim that they would not consider following a vegan diet because they are not sure how products are produced

Opportunities

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Influencing factors on our Dietary lifestyles

- Health
- Back to Basics
- Identity
- The Environment
- COVID-19

Opportunities To Win With New Dietary Lifestyles

01 Promote Pluralism

02 People & Planet Parley

03 Performance Power

04 Pure Pleasure

05 Proof of Realness

06 Perfecting the Practical

Opportunities To Win With New Dietary Lifestyles – The 6Ps

01 Promote Pluralism

02 People & Planet Parley

03 Performance Power

04 Pure Pleasure

05 Proof of Realness

06 Perfecting the Practical

01 Promote Pluralism

INSIGHT:

People want to engage with brands that are "doing good" for the planet…

…but need help in understanding the importance of having a diverse diet for themselves and for the planet

ACTIVATION METHODS:

A: Encourage diverse eating – *"5 a day"* *(Eating different food types)*

B: Educate consumers on the role your product plays

C: Create complimentary partnerships

D: Consider regenerative agricultural practises

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01 Promote Pluralism

Case Study 01: Knorr Future 50 Foods

According to the UN FAO (Food and Agriculture Organisation) 75% of the world's food supply comes from just 12 crops and 5 animal species, and that we are currently eating fewer than 200 of the more than 20,000 known edible plant species worldwide.

To inspire a more sustainable food future, Knorr, in partnership with World Wide Fund for Nature (WWF)**, has selected 50 ingredients based on their taste, nutritional value and low environmental impact. Knorr aims to make using these foods tasty, easy and exciting in the future.**

Food Diversity Ambition

"Our ambition is to make it easier for people to eat a wider variety of foods that are good for us, good for the planet, and of course delicious at the same time." Knorr Global Vice President April Redmond

- **A: Encourage diverse eating** ✓
- **B: Educate consumers on your products role** ✓
- **C: Create complimentary partnerships** ✓
- **D: Consider regenerative agricultural practises** ☐

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01 Promote Pluralism

Case Study 02: Cooks Venture Topsoil Targets

Cooks Venture is a US direct-to-consumer meat producer that provides grain and bean-based feed for its heirloom, hormone-free and pasture-raised poultry using regenerative agriculture.

Pledging to nurture its topsoil (allowing maximum carbon to be absorbed), it will regularly publish soil-health measurements on its website.

A Best Seller

Launched in 2019 the Cooks Venture Chicken is already Fresh Direct's best seller in the US.

US$10m

Cooks Venture recently raised US€10 million capital investment. Participating in the investment was angel investor, Larry Schwartz, and John Roulac, producer of the US documentary on regenerative agriculture, KISS THE GROUND.

- A: Encourage diverse eating ☐
- B: Educate consumers on your products role ☑
- C: Create complimentary partnerships ☑
- D: Consider regenerative agricultural practises ☑

01 Promote Pluralism

Case Study 03: Dairy farmers of America launch Craigs Creamery

The Bio-Gas Digester:

Dairy Farmers of America has partnered with eight New York farm families to launch Craigs Creamery – a cheese brand crafted with all-natural ingredients and no added hormones that is working towards becoming a 100% sustainable operation.

20 million Scraps

One of the farms features a state-of-the-art bio-digester that powers the creamery; it is the only digester in the U.S. that fuels an on-site plant. It is powered by animal waste, which also is used to fertilize the fields and expired food from the local community. In the past five years, it has upcycled nearly 20 million pounds of food scraps that otherwise would have gone to a landfill.

- [ ] A: Encourage diverse eating
- [x] B: Educate consumers on your products role
- [x] C: Create complimentary partnerships
- [x] D: Consider regenerative agricultural practises

02 People & Planet Parley

INSIGHT:

People want to be part of the conversation, but they also need to understand the conversation!

ACTIVATION METHODS:

A: Create user friendly language

B: Educate people about the meaning of plant based

C: Use transparent clear symbols

D: Invite consumers to engage-be inclusive

E: Authenticity and honesty is key / Avoid Greenwashing

02 People & Planet Parley

Case Study 04: Annie's Homegrown Clean Field Farming Certification Journey

New Jersey baby food company Gerber's Clean Field Farming's toddler meal range and Annie's Homegrown's cereals and soups emphasize "good soil" in their online and on-pack brand communications.

Formal Verification Standard

The Carbon Underground and Green America, in partnership with Ben & Jerry's (Unilever), Danone Wave, Annie's (General Mills), and MegaFood have begun development of a **formalised global verification standard** for food grown in a regenerative manner.

- A: Create user friendly language ☑
- B: Educate people about the meaning of plant based ☐
- C: Use transparent clear symbols ☑
- D: Invite consumers to engage-be inclusive ☐
- E: Authenticity and honesty is key / Avoid Greenwashing ☑

02 People & Planet Parley

Case Study 05: Grocycle - 'Grow Your Own Sustainably'

At a recent V&A 'Bigger than the plate' event GroCycle displayed oyster mushrooms growing on sacks of used coffee grounds.

Since 2009, Grocycle have been finding the easiest Low Tech sustainable ways to cultivate mushrooms.

They offer a range of online mushroom growing courses, and for those not ready for a full course can check out GroCycle's mushroom growing kits, which are perfect for anyone who wants to simply grow mushrooms at home.

Grocycle have a Resource Hub for free education on the subject.

A: Create user friendly language	✓
B: Educate people about the meaning of plant based	✓
C: Use transparent clear symbols	
D: Invite consumers to engage-be inclusive	✓
E: Authenticity and honesty is key / Avoid Greenwashing	✓

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02 People & Planet Parley

Case Study 06: Fords Gin Cocktails from Upcycled Waste

Fords Gin produced a pop-up cocktail event in partnership with Trash Tiki, a bartender group that creates cocktails from upcycled waste products.

The brand's "Super Tiki Wasteland Paradise" featured gin-based craft cocktails, recycled drinkware and tiki art made from Summit's waste products.

Trash Tiki

"What Trash Tiki does so beautifully is talk about how can you get the most out of everything that you're using, whether it's taking the pits from an avocado and using those to create an Orgeat syrup, or repurposing leftover pastry to create something that can go into a drink" - Sharon Bronstein, marketing director for The 86 Co., creators of Fords Gin.

- [x] A: Create user friendly language
- [ ] B: Educate people about the meaning of plant based
- [ ] C: Use transparent clear symbols
- [x] D: Invite consumers to engage-be inclusive
- [x] E: Authenticity and honesty is key / Avoid Greenwashing

03 Performance Power

INSIGHT:

People seek out products that are better for their physical and mental health, but also good for the planet

ACTIVATION METHODS:

A: Functionalise foods to specifically help improve health and wellbeing

B: Continued emphasis on products that marry science and nature

C: A post Covid world creates specific opportunities for Immunity and weight

D: Transparent and clean production processes

E: Avoid the language of perfection

03 Performance Power

Case Study 07: Huel (Human + Fuel) – A Nutritionally Complete Food

Every Huel meal contains a balance of all 26 essential vitamins and minerals, protein, essential fats, carbs, fibre and phytonutrients in a single product.

Huel is made from plant-based sustainable ingredients like oats, pea, rice, flaxseed, coconut, and sunflower, and it is available in a range of formats such as powder, ready-to-drink and bars.

50 million meals

Launched in 2015 and after only 4 years, Huel is now selling 50 million meals a year, in more than 80 countries, with an annual turnover of UK£40m.

A: Functionalise foods that help improve health and wellbeing

B: Continued emphasis on products that marry science and nature

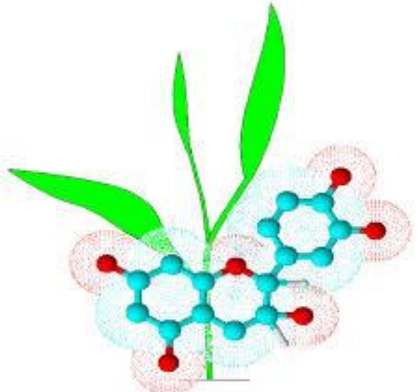
C: A post Covid opportunities for Immunity and weight

D: Transparent and clean production process

E: Avoid the language of perfection

03 Performance Power

Case Study 08: Nutrixin Nutraceutical Drinks Range



Singapore-based brand Nutrixin has launched a range of functional beverages boasting a range of health benefits. Dubbed nutraceuticals, each drink contains a high concentration of polyphenols – micro-nutrients found in plant-based foods that are thought to help prevent a range of health concerns, including cardiovascular diseases, digestion issues, and neurodegenerative disease. Nutrixin drinks are designed to boost immunity, digestion and cognitive function.

X 5 times more Polyphenol

Nutrixin launched its first functional beverage, Appeel, in H1 2019. This is an apple peel essence containing five times the polyphenol content of conventional juices

- A: Functionalise foods that help improve health and wellbeing ✓
- B: Continued emphasis on products that marry science and nature ✓
- C: A post Covid opportunities for Immunity and weight ✓
- D: Transparent and clean production process ✓
- E: Avoid the language of perfection ✓

04 Pure Pleasure

INSIGHT:

People want to enjoy their food and moments of indulgence, while trying to maintain a state of balance

ACTIVATION METHODS:

A: Promote taste

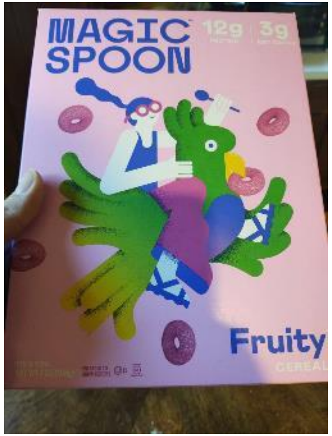
B: Deliver on healthy sustainable indulgence

C: Play with the unusual for the curious

D: Provide inspiration for a diverse diet

04 Pure Pleasure

Case Study 09: Magic Spoon Re-imagining our Childhood Favourites



Harkening back to the look and taste of childhood favourites, Magic Spoon's cereals are striking a balance between Americans' desire for good-for-you grub and healthy food that doesn't taste like it is.

It uniquely provides a similar taste to your traditional sweet cereal while also being high in protein and low in carbohydrate. It is made with natural flavours only and it is also free from sugar, gluten and grain.

Triple Digit Growth

The brand, which launched in 2019 with keto-friendly cereal, has seen triple digit growth up to the spring of 2020.

- A: Promote taste ✓
- B: Deliver on healthy sustainable indulgence ✓
- C: Play with the unusual ✓
- D: Provide Inspiration for a diverse diet ✓

04 Pure Pleasure

Case Study 10: Pimp Any Salad

The vegan, gluten, and dairy-free toppers are packaged in eco-friendly glass jars, boxes, and pouches.

"Veganism is getting big in Australia and we do extremely well in this sector, but what is really exciting are the number of customers embracing the brand, and loving the flavours on offer, who aren't necessarily following a plant-based diet," says founder Plotnikova.

1,200 Stores & Growing

The brand has successfully grown in Australia, where they are available in over 1,200 health stores and independent supermarkets and are currently looking to enter UK through Costco and Woolworths.

A: Promote taste ✓

B: Deliver on healthy sustainable indulgence ✓

C: Play with the unusual ✓

D: Provide Inspiration for a diverse diet ✓

04 Pure Pleasure

Case Study 11: Violife Target The Indulgent Cheese Toastie Occasion

Violife's sensory appealing advert shows how people can still make their favourite foods – such as a 'midnight masterpiece' cheese toastie – with its vegan cheese option.

Sales Momentum

In 2019 sales of Violife's coconut-based cheese alternatives grew by +79%, with the trend set to continue with planned listings into 550 new Tesco Express stores and more than 200 Sainsbury's Locals.

- A: Promote taste ✓
- B: Deliver on healthy sustainable indulgence ✓
- C: Play with the unusual ☐
- D: Provide Inspiration for a diverse diet ✓

04 Pure Pleasure

Case Study 12: Invasive Species provide Inspiration

Chefs are using invasive species as viable protein sources. British cook Ivan Tisdall-Downes serves lasagne and game parfait made with grey squirrel at his sustainable London restaurant Native.

Meanwhile, US fast-casual chain Farm Burger's new Invasive Species Sandwich features environmentally destructive blue catfish.

Eating the Problem!

Tasmania's Museum of New and Old Arts' new recipe book, **Eating the Problem**, features invasive species from around the world used in dishes by chefs like Heston Blumenthal (UK) and Shannon Bennett (Australia).

These include for example possum with salt-baked vegetables and sweet and sour cane-toad legs.

- [ ] A: Promote taste
- [ ] B: Deliver on healthy sustainable indulgence
- [x] C: Play with the unusual
- [x] D: Provide Inspiration for a diverse diet

05 Proof of Realness

INSIGHT:

People seek what is natural in an ever increasing processed world

ACTIVATION METHODS:

A: Relatable Ingredients or tastes

B: Utilise familiarity

C: Promote the power of provenance

D: Transparency from source to lips

05 Proof of Realness

Case Study 13: Avonmore ‘Farmfulness’

Avonmore is continually evolving its brand range to be relevant to the widening range of modern dietary lifestyles, while still emphasising its provenance, heritage, the farmers and their process from farm to fridge that has built up the brand trust and familiarity over time.

‘Farmfulness’

In celebration of the heritage and provenance of Avonmore, the nation’s number one milk brand, Avonmore Fresh Milk brought a little bit of ‘farmfulness’ to their customers to enjoy in homes around Ireland in autumn 2019. The brand created a fun on-pack mechanic bringing the sounds of the farm direct to its customers through a QR code.

A: Relatable Ingredients or tastes	✓
B: Utilise Familiarity	✓
C: Promote the power of provenance	✓
D: Transparency from source to lips	✓

05 Proof of Realness

Case Study 14: M&S Grown in-store

At its revamped Clapham store that reopened this month, M&S Food grows herbs that are tended to and harvested by staff. This means herbs stay fresh until the last possible moment and they're sold with the roots attached, so they last longer for customers too.

Future In-Store V In-Field!

In the future, we might see more fresh produce grown in store. Can you imagine pulling potatoes out of soil-packed supermarket shelves? It might seem far-fetched now, but John Lewis has announced that its customers will be able to pick their own salad in store by the end of next year!

- A: Relatable Ingredients or tastes ✓
- B: Utilise Familiarity ✓
- C: Promote the power of provenance ✓
- D: Transparency from source to lips ✓

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05 Proof of Realness

Case Study 15: Familiar & Trusted Brands Extending into Free-from

The familiarity and trust big brands have built over many years is a key proof point for those flexitarians who intend on balancing their diets but want to still have the familiar tastes, flavours and experiences they are familiar with.

+7.7%

The world's second largest brewer said sales of its leading brand rose by + 7.7% volume in 2018, helped by the growing success of Heineken 0.0 as it rolled out the zero-alcohol tipple to 38 markets worldwide.

- [x] A: Relatable Ingredients or tastes
- [x] B: Utilise Familiarity
- [ ] C: Promote the power of provenance
- [ ] D: Transparency from source to lips

06 Perfecting the Practical

INSIGHT:

People want to avail of "better for you" options but often need help!

ACTIVATION METHODS:

A: Evolve the routes to market

B: Establish clear value for Money

C: Consider convenience to support diversification at home

D: Consider convenience to support diversification when out

E: Utilise Dietary Reassessment Moments
(i.e. Veganuary / meat-free Mondays / Fish Fridays)

06 Perfecting the Practical

Case Study 16: The Plant Jammer AI Vegan Recipe App

Plant Jammer is an app that uses AI, deep data, and science around flavours to offer up vegan recipes based on what the user has available in their fridge.

It is helping people move towards plant-based diets and reduce food waste.

1 Billion Eat Sustainably

"Our declared mission is to help one billion people across the globe eat sustainably," said Michael Haase, founder and CEO of Plant Jammer

- A: Evolve the routes to market ✓
- B: Create Value for diversifying ✓
- C: Convenience At home ✓
- D: Convenience When out
- E: Dietary Reassessment Moment ✓

06 Perfecting the Practical

Case Study 17: Asda 'One Stop Shop' Food Hall

The Asda Watford store is a Supercenter and includes a McDonalds, Sushi Daily and Calirs.

The vegan butcher sits alongside these other counters in-store providing shoppers with a convenient one-stop shop for those shopping and eating with diversifying needs.

- A: Evolve the routes to market ✓
- B: Create Value for diversifying ✓
- C: Convenience At home
- D: Convenience When out ✓
- E: Dietary Reassessment Moment ✓

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06 Perfecting the Practical

Case Study 18: Mindful Chef – Farm to Fork Recipe Box

Mindful Chef

Mindful Chef are a health-focused food box company set up by school friends Giles, Myles and Rob.

Since their launch in 2015, they have shipped over 10,000,000 ingredients from small farms across the UK.

UK £25 million

Mindful Chef is seeking UK£25m in a new fundraising round as private equity investors, blue-chip conglomerates and retailers' clamour to own a piece of the fast-growing farm-to-fork recipe box brand.

- A: Evolve the routes to market ✓
- B: Create Value for diversifying ✓
- C: Convenience At home ✓
- D: Convenience When out
- E: Dietary Reassessment Moment ✓

Influencing factors on our Dietary lifestyles

- Health
- Back to Basics
- Identity
- The Environment
- COVID-19

Opportunities To Win With New Dietary Lifestyles

01 Promote Pluralism

02 People & Planet Parley

03 Performance Power

04 Pure Pleasure

05 Proof of Realness

06 Perfecting the Practical

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