

Dietary Lifestyles

February 2021

Overview of Report

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 - Who is driving it
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5. What's on our plate?
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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 rigorous, 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. The sample size for the UK market was N=2,056

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.



empathy

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

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



Macro Theme #1

Health



Health

1.

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

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)





Health

81%

of adults deem themselves
to be healthy/very healthy,
with adults in the UK
significantly less likely to
feel this is the case



71%

-3%

The drop in satisfaction
with our mental health
since 2018 is even more
pronounced amongst
adults in the UK



-7%



Health

Adults in the UK are making an effort to eat more healthily and exercise more, but to a slightly lesser degree than their global counterparts

64%

Are making an effort to eat more healthily



62%

56%

Are making an effort to exercise more



53%



Functional foods continue to show strong growth, but they are slightly less sought after in the UK

Health

% Agree

I seek out food and drink with immune boosting benefits



17%

24%

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



17%

23%

I seek out food and drink with added vitamins or minerals



14%

17%

I seek out food and drink with added protein



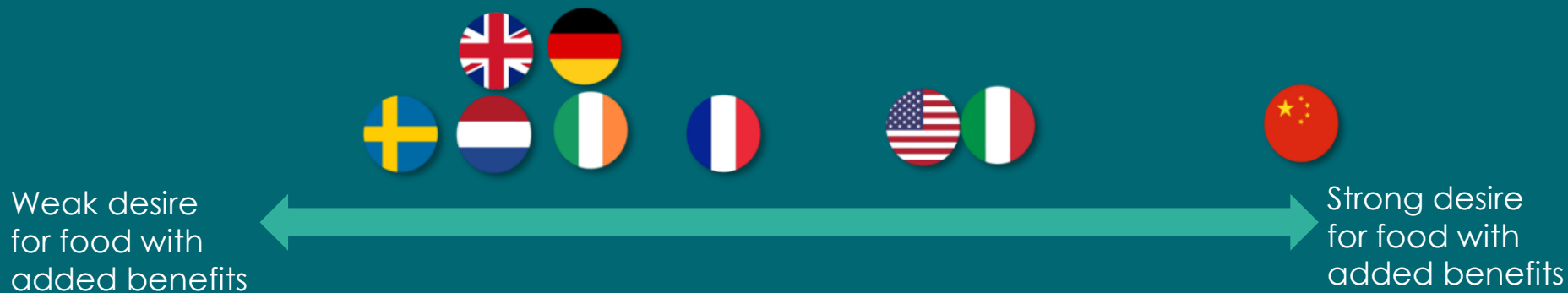
13%

14%



Health

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



The UK is in line with the majority of their European counterparts when it comes to the desire for food with added benefits



Macro Theme #2

Back to Basics



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



46%

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



Consideration for clean and natural food is less prevalent in the UK, but cooking from scratch is as prevalent as we record globally

Back to Basics

% Agree

I like to cook from scratch

45%



46%

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

37%



27%

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

28%



20%

I will purchase organic food whenever possible

26%



15%

A background image showing a pair of hands, likely belonging to an elderly person, gently cupping a small, vibrant green seedling with four leaves. The seedling is growing out of a mound of dark, rich soil. The hands are positioned on either side of the plant, with fingers slightly curled to support it. The overall tone is warm and hopeful, emphasizing care for the environment.

Macro Theme #3

The Environment



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,
with adults in the UK
marginally more likely to be
making this effort**



67%

27%

**are willing to pay
more for food which is
sustainably
produced, although
adults in the UK are
less willing to do so**



21%



The Environment

Adults in the UK are less focused on Local Food & Provenance

% Agree

I pay particular attention where the food I purchase comes from

30%



21%

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

28%



19%

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

20%



15%



The Environment

Adults in the UK are more mindful of their environment and how they are impacting the environment.

59%

are making more of an effort to reduce the amount of plastic they buy, with adults in the UK significantly more likely to be doing so



64%

57%

are making more of an effort to reduce their carbon footprint/care for the environment more



57%



Macro Theme #4

COVID-19



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

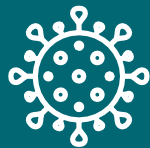


In China, 71%
agree that eating
healthily is a higher
priority for them
since COVID.



36% in US and 34%
in Italy





COVID-19

COVID has accentuated the desire for 'protective health', with consumption of vitamins and minerals higher in the UK

31%

Consuming vitamins and minerals daily



38%



Lower Incidence

Higher Incidence

Triggers for Usage are Immunity Driven

(Base: All Adults aged 18+ who consume vitamins & minerals at least monthly n=11,042, UK n=1,229)

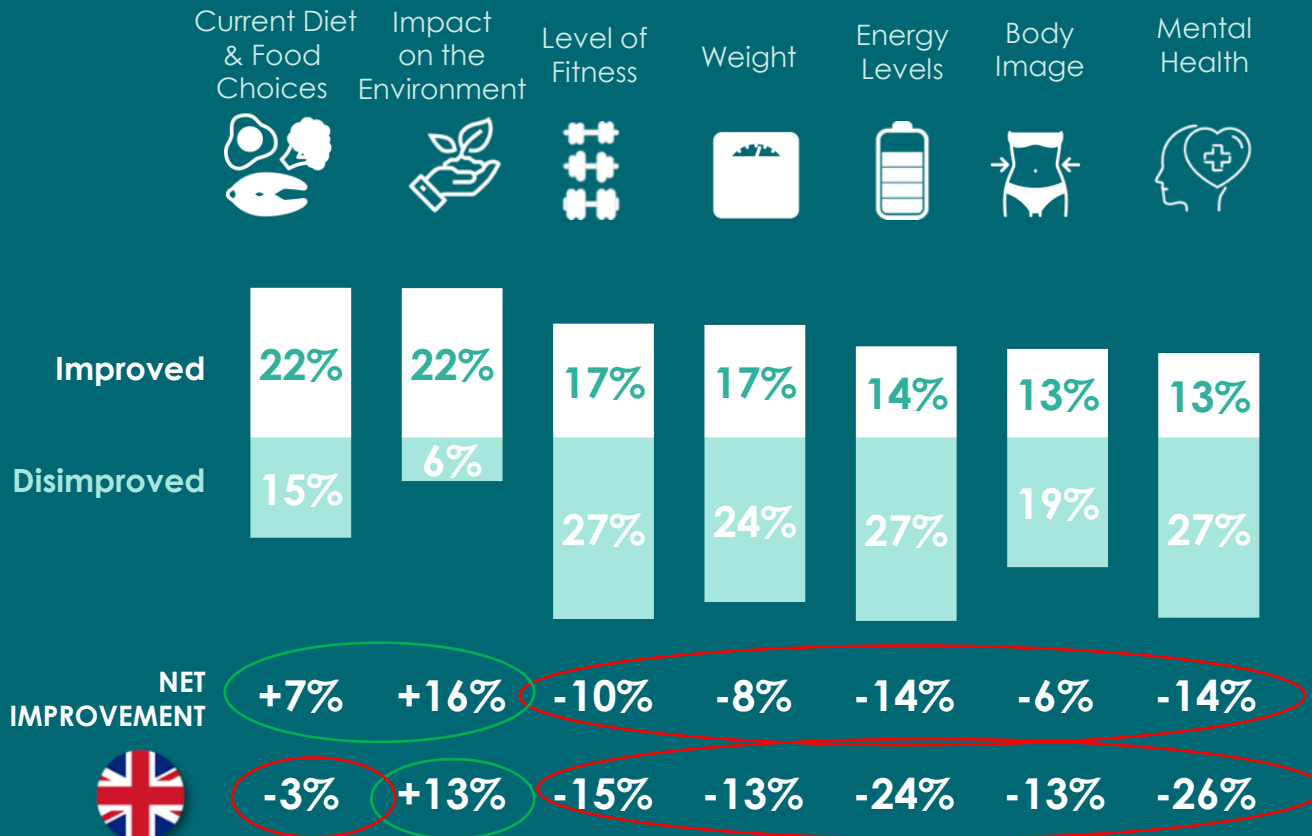




COVID-19

COVID-19 is taking more of a toll on adults in the UK than we record globally

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.





COVID-19

**“I see it’s all connected
- the pandemic and
the fact that our
environment is
changing now”**

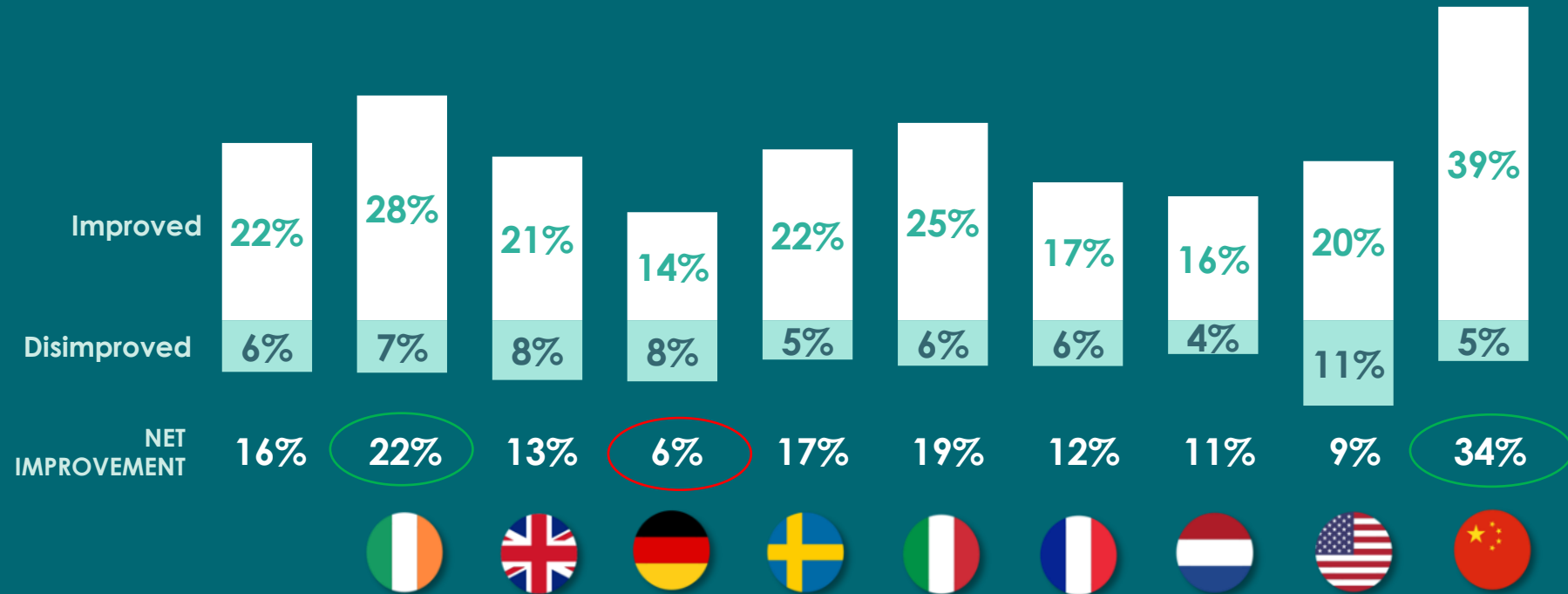
(Katelyn Culleton, National Youth Assembly on Climate Action, 2021)



COVID-19

The perceived impact on the environment amongst adults in the UK is improving since COVID...

Impact on the Environment





COVID-19

COVID-19 has accelerated plant based growth

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.



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!**



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.





Identity

The social
dynamics
seem be
evolving

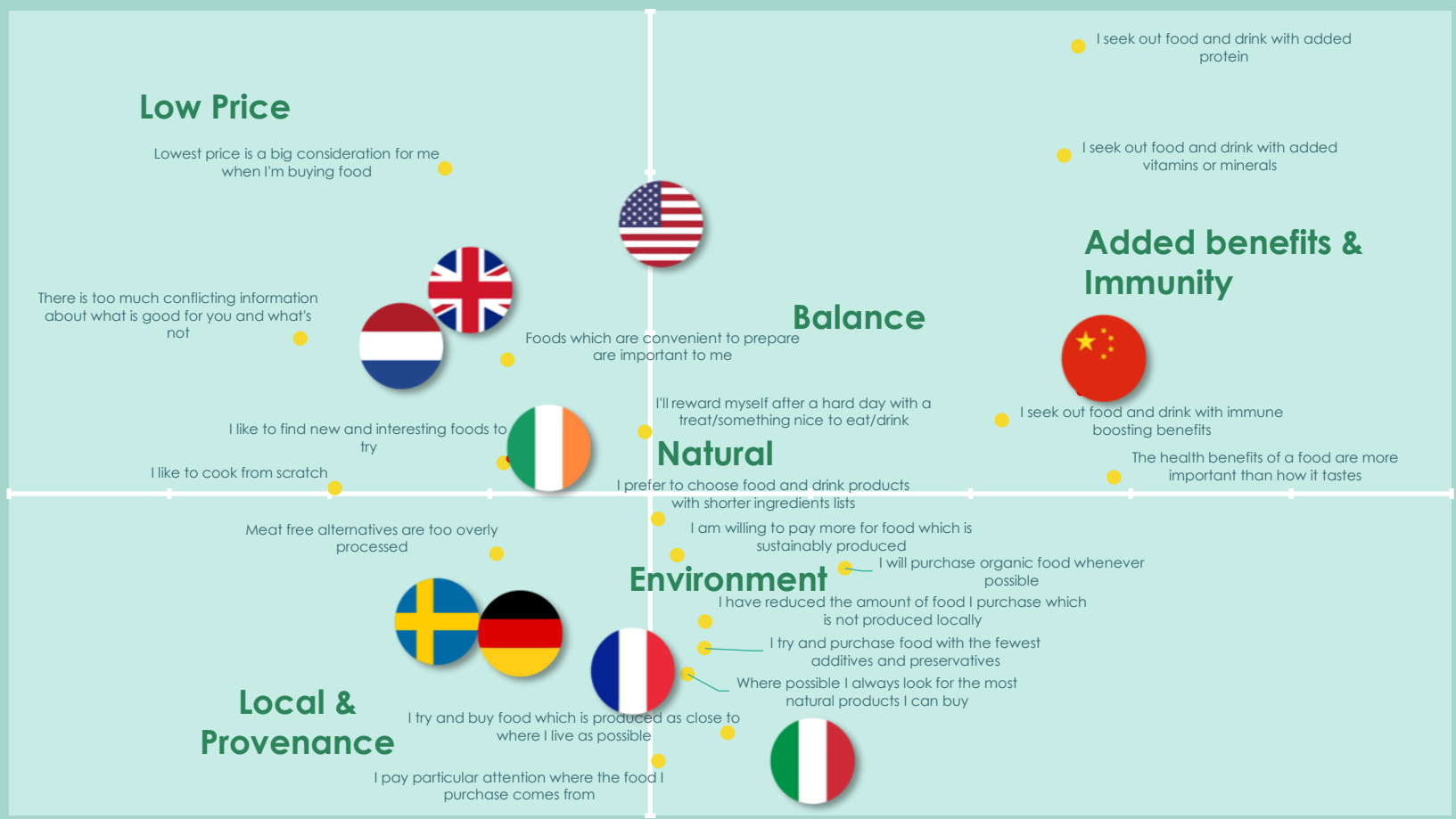


Identity

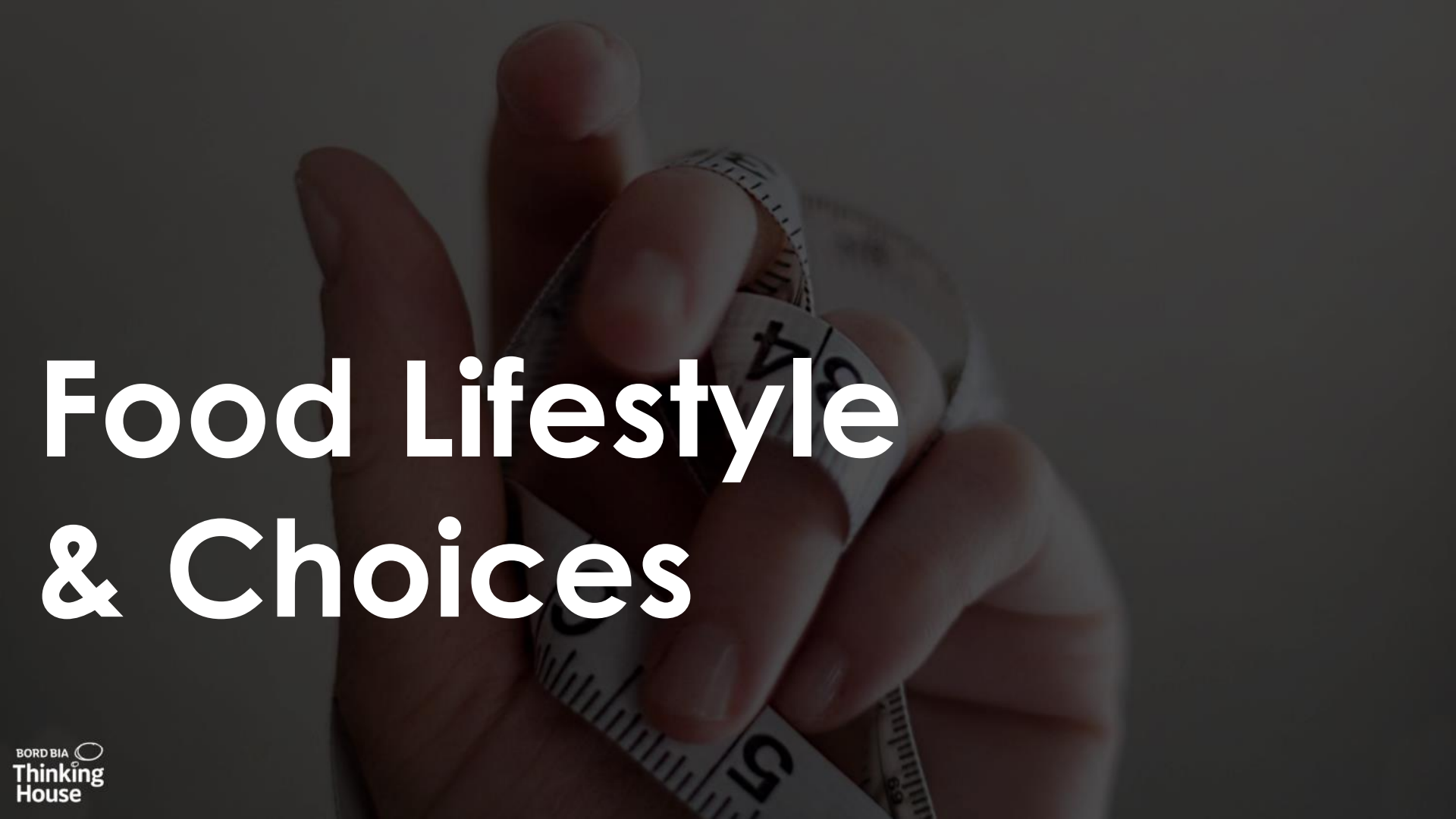
It's less about perfection and more about being inclusive

Brands that
are doing
well have
been more
inclusive

How people prioritize factors shows up differently across markets



(Base: All Adults aged 18+ n=18,591 UK n=2,056)

A close-up photograph of a hand holding a white measuring tape. The hand is positioned with the thumb and index finger gripping the tape, which is coiled around the fingers. The background is a soft, out-of-focus grey. The overall image has a dark, semi-transparent overlay, making the white text stand out.

Food Lifestyle & Choices



How is Behaviour Changing?

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 globally don't
adhere to any particular
diet or food lifestyle, with
adults in the UK less
inclined to do so



73%

The move towards balance is evident in the UK also



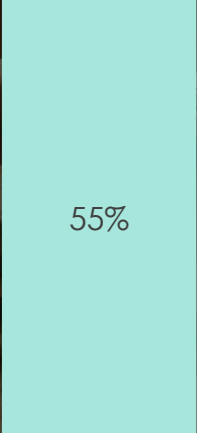
Outlook which best describes nature of diet



51%



2018



2020



54%



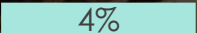
9%



3%



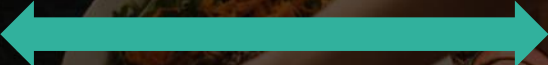
2018



2020

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

FOCUSSED
I follow a specific diet or food lifestyles



**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%



34%

% Consuming
Each Weekly+

95%



69%



91%



68%

**High levels of
'good' and 'bad'
food choices**



94%



88%



77%



63%

“Association” with a vegan lifestyle has increased in the UK, 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%



12%



2018

5%



5%

2%



2%

1%



1%

“Association” with a Vegetarian lifestyle is in line with global levels in the UK

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%



15%



2018

9%



10%

9%



9%

7%



7%

“Association” in ascendance for Flexitarians, although adherence in the UK is marginally lower than global levels

Flexitarians

Association with
this type of
diet/food lifestyle

2020

24%



20%



2018

14%



11%

Adherence to this type of
diet/food lifestyle in terms of
food consumption behaviour

19%



16%



12%



9%

Who are the Different Groups?

Flexitarian

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

Overview of Vegetarians

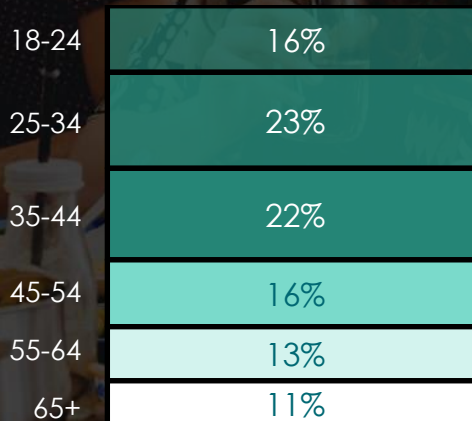
Still quite young relative to the total population, although slightly older than 2018 levels. Just over 6 in 10 are female, in line with the proportion in 2018.

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

Male Female



38% 62%



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

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

Why? The Motivations

**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.

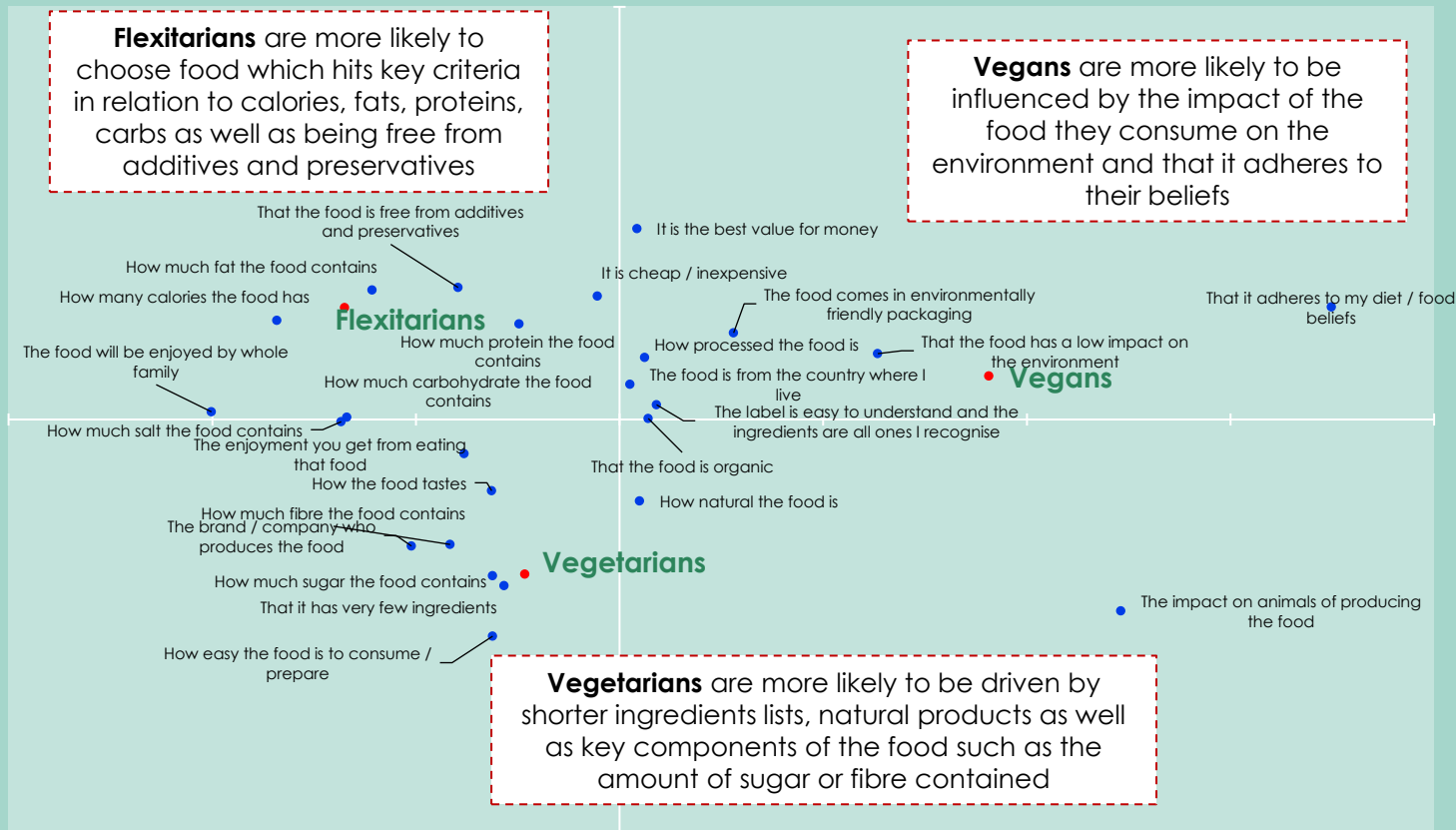
17%

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.

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%



What's on our Plate?

Fruit & Veg has seen significant consumption over the past year, although the proportion increasing their consumption is lower in the UK

VEGETABLES

Weekly or
more often
consumption

95%



94%

% NET
Increased
consumption in
the Past 12
Months

+30%



+23%

FRUIT

90%



88%

+27%



+20%

- Poultry consumption levels are high and have increased in the UK

POULTRY

Weekly or
more often
consumption

79%



83%

% NET
Increased
consumption in
the Past 12
Months

+11%



+9%

(Base: All Adults aged 18+ n=18,591 UK n=2,056)

While consumption of Red Meat has declined, consumption levels are high in the UK currently

RED MEAT

70%



72%

-9%



-13%

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

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

BORD BIA IRISH FOOD BOARD

Nov – Dec
'20

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”



34%



24%



23%



22%



21%

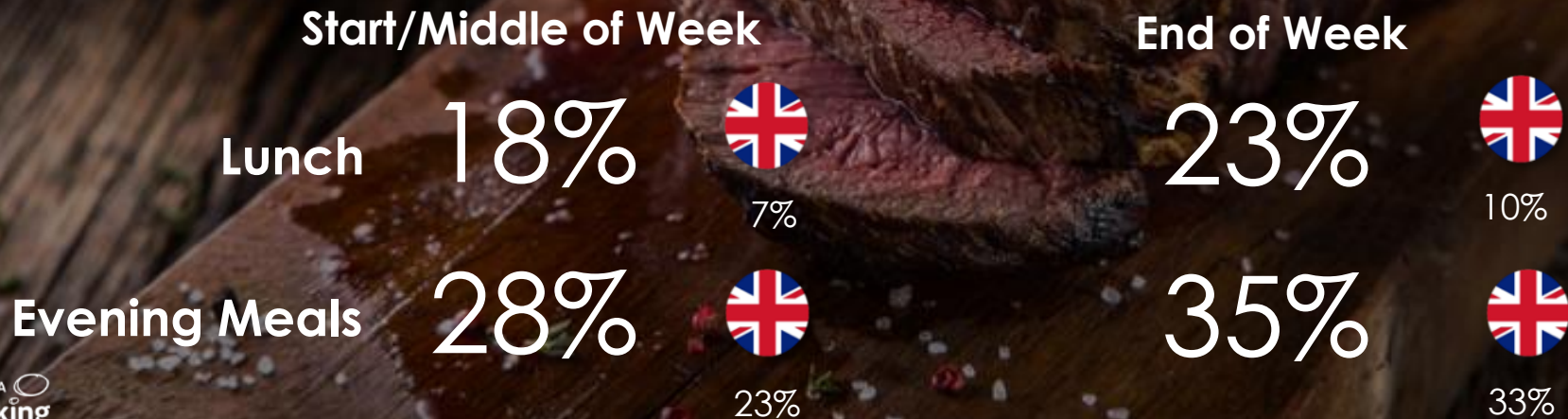


18%

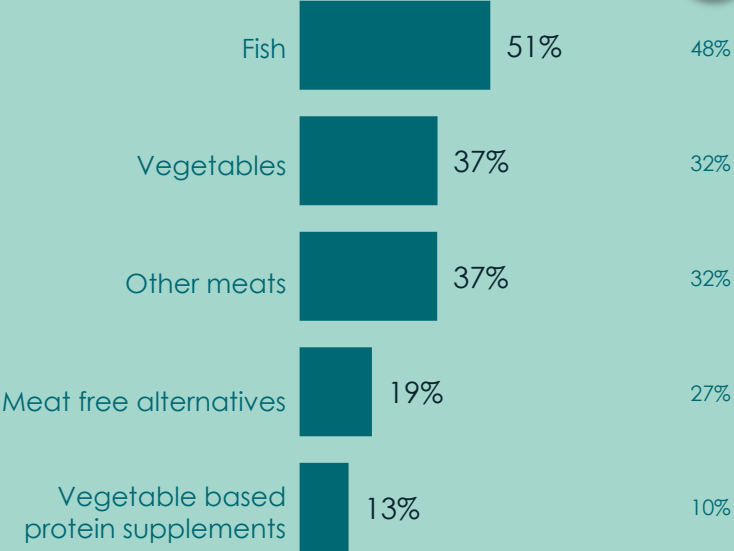


14%

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 in the UK, particularly at the weekend.



Meat Free alternatives play more of a role in the UK when it comes to the substitution of red meat



Meat free alternatives show growth over the past year, although overall weekly consumption levels are lower in the UK currently

Meat free Alternatives

Weekly or
more often
consumption

38%



33%

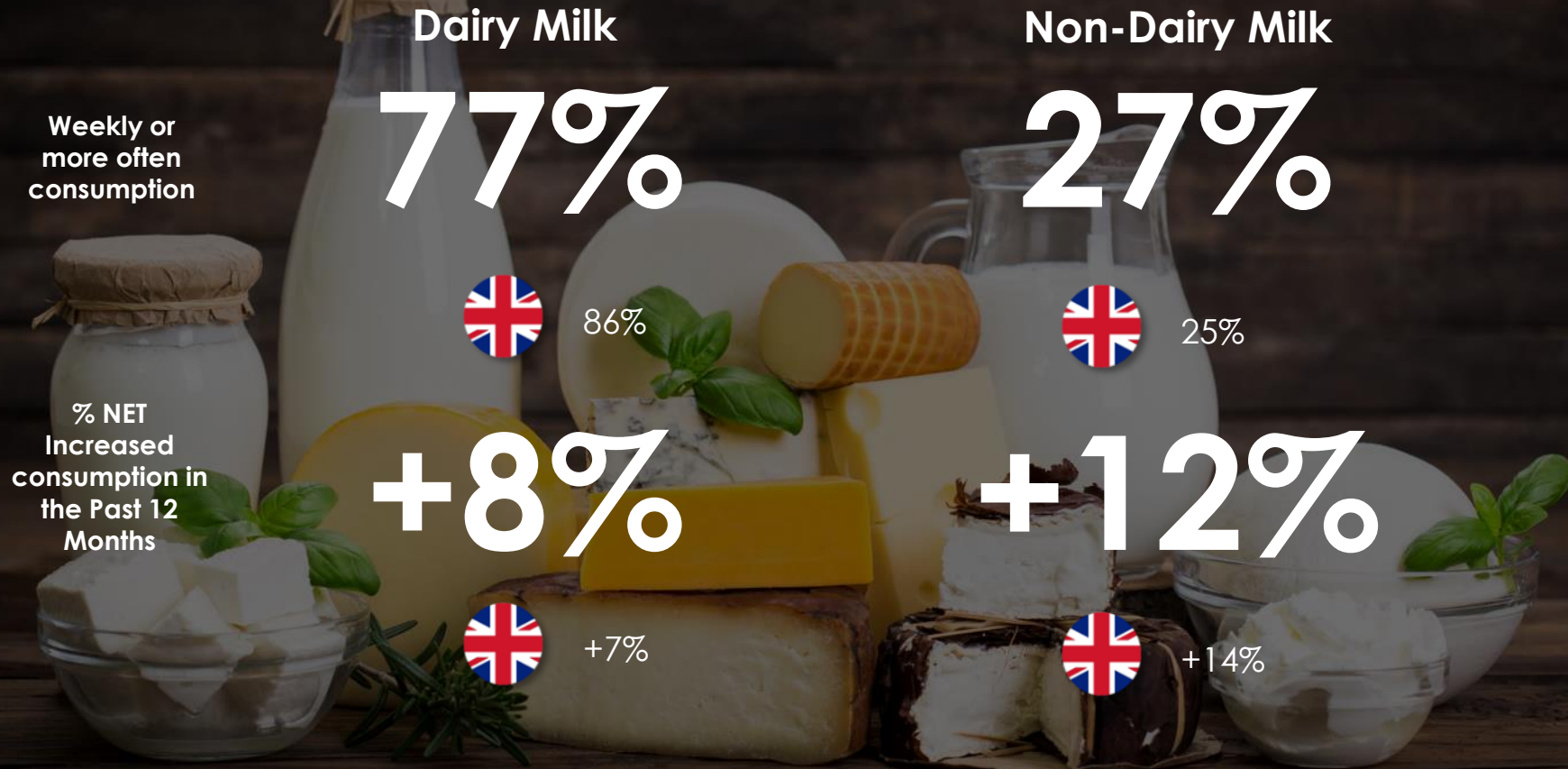
% NET
Increased
consumption in
the Past 12
Months

+8%



+15%

Consumption of Dairy Milk significantly higher in the UK



Consumption of Cheese is high in the UK and while non-dairy cheese consumption levels are significantly lower currently, they are rising

Dairy Cheese

82%



84%

Non-Dairy Cheese

22%



18%

Weekly or
more often
consumption

% NET
Increased
consumption in
the Past 12
Months

+6%



+2%

+6%



+9%

Yoghurt category demonstrates strong growth in the past 12 months, although consumption is lower in the UK relative to global levels

Dairy Yoghurt

Weekly or
more often
consumption

68%



64%

% NET
Increased
consumption in
the Past 12
Months

+10%



+6%

Non-Dairy Yoghurt

25%



20%

+8%



+9%

Butter/Spreads consumption significantly higher in the UK, with the consumption of non-dairy butter/spreads significantly lower

Dairy Butter/Spreads

Non-Dairy Butter/Spreads

Weekly or more often consumption

72%

29%



82%



23%

% NET Increased consumption in the Past 12 Months

-2%

+3%



-1%



+8%



Free From/Alternative Market Purchasing Dynamics

High Level of Purchase and Repeat Purchase Evident in the Free From/Alternatives Market, with the UK market matching global levels in terms of regular purchase

62%

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



65%

67%

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



67%

The purchase incidence of Meat Free is significantly higher in the UK than we record at a global level

47% have ever
purchased “Meat
Free”



56%

40% have ever
purchased “Dairy
Free”



37%

21% have ever
purchased “Gluten
Free”



18%

25% regularly
purchase “Meat
Free”



32%

23% regularly
purchase “Dairy
Free”



20%

8% regularly
purchase “Gluten
Free”



7%

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%

Desire to Purchase is on the Up

85%



84%

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%



25%

Of these, 17% (20% in the UK) claim they will
purchase a **'Meat Free Alternative'**, with 14% (10%
in the UK) claiming they will purchase a **'Dairy Free
Alternative'** and 4% (5% in the UK) claiming they
will purchase from both categories.

(Base: All Adults aged 18+ n=18,591 UK n=2,056)



A low-angle, rear-view shot of a person walking on a large, weathered log in a forest. The person is wearing dark blue jeans and white socks. The forest floor is covered in fallen leaves, and the background is filled with trees and foliage, creating a sense of a natural, challenging environment.

The Challenges



Convenience remains a significant challenge to following a specific dietary lifestyle, but ease of meal preparation is less of a barrier in the UK

Agree

Foods which are convenient to prepare are important to me

29%



26%

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



53%

47%

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



39%



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%

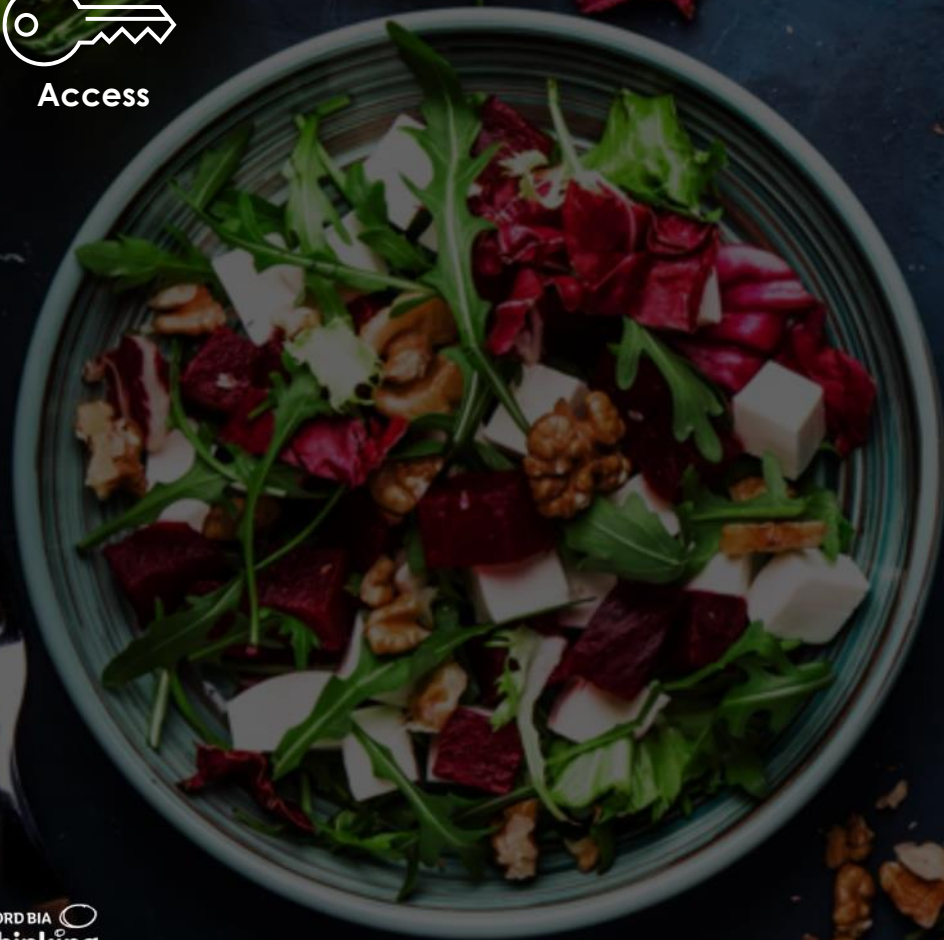
of those who have stopped vegan/vegetarian diets claim they did so because there wasn't enough convenient food options available for them



17%



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.



Comprehension

Language in the category can be a deterrent

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



- 100% RECYCLABLE
- REUSABLE



Comprehension

“I barely know what
the word sustainable
means anymore”

Stella McCartney



Price

Low price is more of a consideration in the UK when buying food, but affordability is less of a challenge when embarking on a diet initially

Agree

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

26%



29%

18%

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



19%

52%

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



45%



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



Some consumers question how healthy it is to follow a vegan diet, although adults in the UK are marginally less likely to do so

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
 (26% amongst adults in the UK)

23% are concerned that there would be a loss of vitamins/nutrients
 (21% amongst adults in the UK)

18% believe that they need animal protein to stay healthy
 (16% amongst adults in the UK)

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.



Health

There are some perceptions that plant-based foods can be too processed, with concerns in line with global levels in the UK

30%

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



(27% amongst adults in the UK)

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%)



(19% amongst adults in the UK)

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



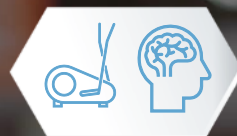
(8% amongst adults in the UK)

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



Opportunities

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

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



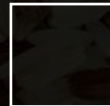
B: Educate consumers on your products role



C: Create complimentary partnerships



D: Consider regenerative agricultural practises



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.

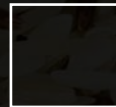
A Best Seller

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

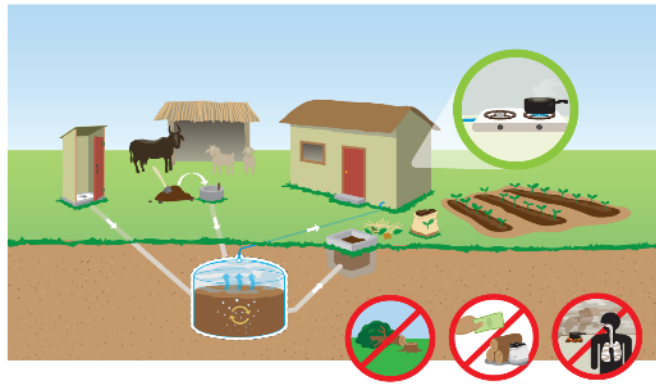


01 Promote Pluralism

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



B: Educate consumers on your products role



C: Create complimentary partnerships



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:

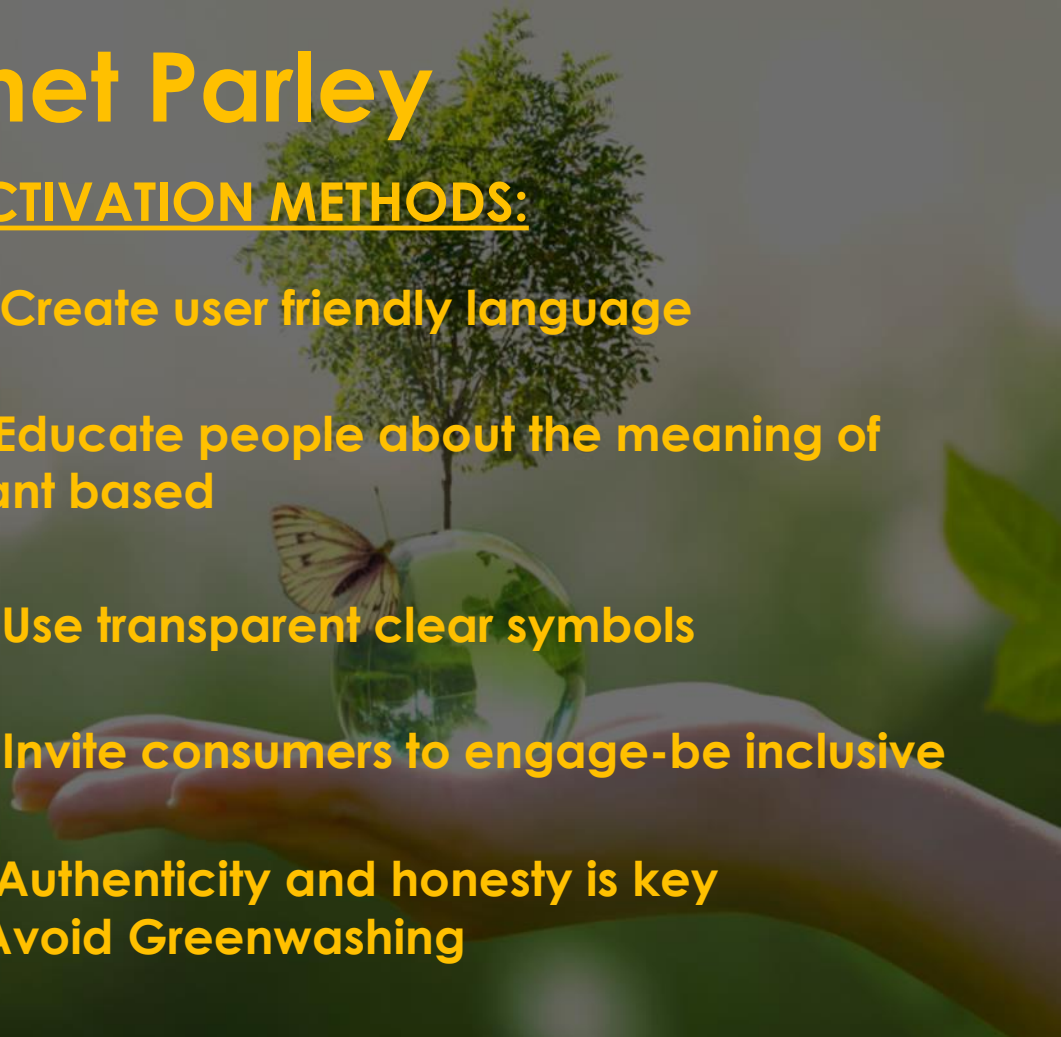
A: Create user friendly language

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



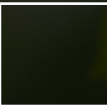
B: Educate people about the meaning of plant based



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



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.

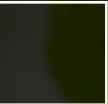
A: Create user friendly language



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



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



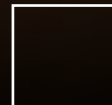
C: A post Covid opportunities for Immunity and weight



D: Transparent and clean production process

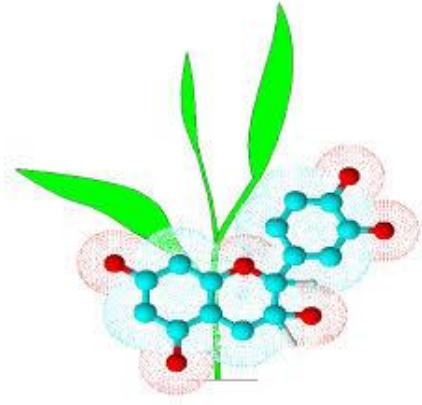


E: Avoid the language of perfection



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.

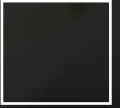
Meanwhile, US fast-casual chain Farm Burger's new Invasive Species Sandwich features environmentally destructive blue catfish.

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



C: Play with the unusual



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



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.

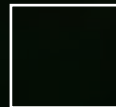
A: Relatable Ingredients or tastes



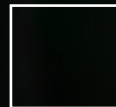
B: Utilise Familiarity



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



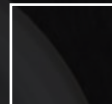
B: Create Value for diversifying



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



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



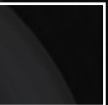
B: Create Value for diversifying



C: Convenience At home



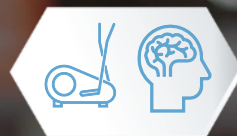
D: Convenience When out



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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