The Future of Animal Protein

Shifting Market Demands Create New Pressures and Opportunities for Animal Protein

In partnership with Phibro Animal Health Corporation
Executive Summary

The Time is Now

We’re at an inflection point.

For the last four plus decades, American agriculture – including animal ag – has focused primarily on improving productivity, efficiency and throughput.

The result has been ever increasing supplies of commodities that have helped assure a safe, abundant supply of food in the U.S. with ample opportunities for growing export markets. American consumers have benefitted from the consistent growth in productivity and efficiency, spending less of their disposable income on food than consumers in any other country. That’s a good thing, right?

Yes. But times are changing – and in some ways, in dramatic fashion. When the clock struck midnight Jan. 1, certainly no one had COVID-19 on their 2020 calendar.

We are now at a juncture where engaged consumers, investors, policy makers and other key stakeholders have new priorities and are asking whether attributes beyond productivity and efficiency deserve greater focus.

While it’s tempting to overestimate short-term impact and underestimate the long-term implications, both qualitative and quantitative signals indicate an important shift in cultural and market expectations for animal protein. Among them:

- Key investors have made it clear that addressing climate change will impact access to capital.
- Growth in alternative proteins, especially in dairy, has remained consistent and is predicted to grow. (No, it will not replace animal protein, but the market interest is a signal not to be ignored.)
- Despite the industry’s remarkable efforts to pivot and adapt, the recent COVID-19 driven disruption in the meat supply chain is raising questions about concentration, integration, ownership, and worker health and safety.
- A growing number of consumers are interested in immune health and the role animal protein should play in their diet.
- Volatility in global trade suppresses export markets and negatively impacts prices for animal protein and other commodities.
- An increasing number of consumers (Gen Z and others) are making purchasing decisions based on attributes beyond maximizing economic value.

These extraordinary circumstances create a new set of challenges – and opportunities – for those producing, processing and marketing animal protein.

In this inaugural issue of CFI 360, The Center for Food Integrity examines the most important emerging trends in animal protein, the latest digital ethnography research on consumer mindset and traditional and social media chatter, and provide specific insight to guide strategy going forward.
Specifically, you’ll find:

1. EXPERT INSIGHTS
Insights on industry and consumers shifts from The Center for Food Integrity Consumer Trust Insights Council (CTIC) that focus on:

- A radical shift back to basic needs
- The demand for food industry innovation that provides affordable, healthful options with an eye toward immunity and how processed foods can play a new role
- Evolving sustainability priorities
- New alternative protein trends and how they impact the animal protein space
- A new generation of consumers who now embrace technology, expect innovation and demand engagement
- Trends to maximize meat meals and the use of technology to make it happen
- How omni-channel shopping and increasingly blurred categories are redefining our shopping and eating habits

2. ILLUMINATE™ DIGITAL CULTURAL INSIGHTS
Attitudes, fears, beliefs and behaviors of engaged consumers and new opportunity spaces as identified by Illuminate™ online digital ethnography:

- Fresh and High Quality – Consumers leaning toward quality options.
- Stretching Meat Purchases – Pressure from the recession is real and doing more with less has evolved as a growing trend.
- Ethically Raised Animals – Animal care, treatment of workers and protecting the environment represent growing concerns, especially in more intensive production systems.
- Plant-Based Alternatives – High levels of initial interest and curiosity are somewhat tempered by the desire for clean, whole foods. The category continues to grow and innovate.

3. MEDIA TONE AND TRENDS
- Insight into traditional and social media, including how plant proteins are dominating and the increasingly negative tone regarding animal protein.

4. THE PATH FORWARD
- Specific guidance and action items that can help those in the animal protein space make strategic decisions to achieve long-term success.

It’s a pivotal moment.

The U.S. animal protein sector has proven itself resilient time and again. That resiliency is once more being put to the test. But those who leverage these newly identified opportunities and address the increasing array of complex challenges without sacrificing efficiency will rise to the top as the likely winners. Those committed to preserving the status quo will be left behind.
EXPERT INSIGHTS
From the CFI Consumer Trust Insights Council
Big Shifts are Brewing

While the COVID-19 pandemic brought much of what we consider "normal" to a standstill, that’s not the case for consumer attitudes regarding their food and how it’s produced. New trends are accelerating and gaining a foothold, according to members of The Center for Food Integrity Consumer Trust Insights Council, who, in recent conversations, analyzed the future of animal protein.

Among the key takeaways:

**Radical Disruption**

Consumer priorities have undergone an important shift. Feeding their families and keeping them healthy are a higher priority.

Cultural attitudes on specific food issues show unprecedented change as consumers continue to sort through the impact of COVID-19.

It’s a seismic shift that has consumers moving down Maslow’s Hierarchy of Needs to embrace safety and security.

Pre-COVID, most people took access to safe, secure food for granted and focused on higher-order psychological and self-fulfillment needs. But the pandemic quickly shifted focus back to the basics as many people lost their jobs, others faced uncertainty about income and illness and many simply feared food shortages. In this period of heightened anxiety, feeding their families and keeping them healthy became a higher priority.

This led to redefining concerns about sustainability during the pandemic as consumers re-evaluated priorities and established a new contextual framework for purchasing decisions that aligns with their values. Instead of being concerned about what’s in the environment that might harm the planet, the concern today revolves more around what’s in the environment that might harm me or my family.

It's too early to tell which shifts are here to stay and which are only temporary. Regardless, a shift has taken place and with it the need to mitigate risk and capture opportunity.
Affordable Healthful Nutrition
Consumers look to food industry innovation to provide affordable, healthful options with an eye toward immunity and how processed foods can play a new role.

Consumer demand for affordable, healthful nutrition is growing, according to MotivBase, a company that performs instant ethnographic analysis on millions of online consumer interactions and conversations related to any trend, topic or product. CFI and MotivBase partner to provide CFI members digital ethnographic research, analysis and strategic guidance on important food system topics.

Consumer interest in nutrition and the impact on immune health has increased with a focus on macro- and micro-nutrients. On the macro side, the research shows consumers are talking about fiber, protein and complex carbohydrates. Both plant and animal protein enter the discussion, and eggs receive particular emphasis. When it comes to micro-nutrients vitamins B12, A, C, D, K and potassium, consumers, again, look to various proteins in both plant and animal products; eggs are a popular topic of conversation here, too.

Consumers are also re-thinking their opposition to “processed foods” if there is a nutritional benefit to the processing. Fortifying processed foods with vitamins and minerals may now be back in vogue as consumers look for more opportunities to enhance immune health.

An aside: the keto high-fat, moderate protein, low-carb diet continues to grow and strengthen, whether that’s hard-core followers or those taking the “lazy” keto approach. A clear win for the protein sector.

Sustainability Pressures
Sustainability concerns are not going away, but they may be reframed in the short-term.

While the issue of sustainability has been reframed to include more personal concerns in the short-term, animal protein will continue to feel long-term headwinds when it comes to sustainability.

Many assume that plant protein is more sustainable; however, that doesn’t mean it’s game over for animal protein. Consumers haven’t drawn a line in the sand. The research shows they are simply asking the question: “Isn’t plant protein more sustainable?” This level of interest creates an opportunity for the animal protein sector to engage with consumers on current sustainability successes and the commitment to continuous improvement. Investors, food system stakeholders and engaged consumers will continue to emphasize the need for animal protein to improve performance on sustainability metrics.
Alternative Proteins

Plant protein is evolving - animal protein should as well.

Plant protein has innovated to dramatically improve taste, appearance and value. Once the domain of dry bean burgers, the category evolved, intent on capturing the appetite and imagination of meat eaters and flexitarians alike. The latest iteration gives meat eaters an alternative to feeling guilty about the health and environmental impacts of animal protein by providing a passable alternative that is perceived to be “better for me and better for the planet.”

That initial perception is now being questioned by a growing awareness that most plant-based meat alternatives are highly processed with a long list of ingredients. This creates conflict in the minds of those looking for healthy alternatives made from simple ingredients. It also creates an opportunity for animal protein to spotlight its nutritional attributes while continuing to innovate and make animal-based protein easier and more enjoyable to prepare at home. The shift from dining out to staying in creates new opportunities to provide innovative solutions to meal preparation.

Recent digital ethnography findings show the dialogue around plant proteins changed by more than 55 percent. This unprecedented shift, never before seen in more than a decade of tracking, illustrates the volatility of the topic and the extent of confusion in the marketplace. The topic is in play and now is the time to engage.

For the first time ever, the insights show a growing connection between the topics of added sugar and plant-based protein. This highlights the increased interest in the ingredients used to make these meat alternatives and reinforces the opportunity for animal protein to highlight clean labels and nutritionally dense protein.

If you buy beef, pork, chicken, milk and eggs, you don’t have to think about added sugar. But if you’re buying a plant-based chicken substitute, added sugar becomes a potential concern.

Tech and Direct to Consumer are on Fire

A new generation of consumers embraces technology, expects innovation and demands engagement.

Niche start-ups like Simulate, (formerly Nuggs) are speaking the language of a younger demographic that has grown up with smart devices in their hands and in their kitchens. The alternative meat company, which started selling soy-based chicken nuggets direct to consumer (DTC) more than a year ago, brands itself as more of a tech company than a food company and claims to have sold a million pounds since inception.

The differentiator - their product isn’t static. Instead of the “we made this ... hope you like it” approach, the company uses consumer feedback to continuously improve product formulations. “To a generation raised on tech, the constant updates of software are not only expected, but give them the impression that their voice is being heard and gives them a new reason to try a product again if they didn’t like it the first time,” said Kevin Ryan, CTIC member and founder of Malachite Strategy. This creates an opportunity, especially with DTC, for animal protein companies to improve their engagement and their products. Time to build in a digital feedback loop for ongoing product innovation!
Stretching the Dollar

Consumers want to maximize meat meals and are using tech to make it happen.

The economic reality of the pandemic and resulting consumer anxiety are forcing more of us to focus on the value of every purchase. Consumers are looking for hacks to stretch their meat purchases, including more batch cooking, eating leftovers, switching to private label, buying less expensive brands and purchasing food in smaller packages.

Research shows consumers now spend 30 minutes or less on preparation, rely more on online shopping with delivery and/or pick-up and take advantage of appliances like bread makers and air fryers that make life in the kitchen easier.

The shift occurred rapidly after the March lock-down, and technology continues to play an increasingly important role. In fact, smart kitchens, while slower to emerge, are growing in popularity, featuring app-connected kitchen gadgets for high-tech conveniences.

Market Fragmentation

Omni-channel shopping and increasingly blurred categories are redefining our shopping and eating habits.

COVID-19 is a pivot point for both consumers and brands that marks a fundamental shift of in-person supermarket shopping as the dominant retail channel, as consumers integrate new ways of buying food. Brands follow suit. Channel fragmentation was a reality prior to the pandemic, but COVID-related anxiety accelerated the transition to unprecedented levels.

Online ordering has skyrocketed, and Walmart has now passed Amazon in online food sales as market leaders pull out all the stops to capture share during this rapid transition. Traditional category lines are being dismantled. Case in point: plant-based products are sold in the meat case, a nutrition bar company now has a line of frozen treats, and a brand of hard seltzer has ventured into the ice cream and sorbet space.

The rapidly emerging category fluidity creates opportunity for the animal protein sector to meet (or create) unmet needs through innovation. Is animal protein center of the plate, a meal stretcher or a snack? The answer is yes to all three and more. The real question is, which animal protein companies will be innovative enough to capture this opportunity?
Online Digital Ethnography
Research powered by MotivBase
Who’s Driving Change

Threats

Consumers having conversations online about animal protein weigh many factors when making decisions about what ends up on their tables. Fear and uncertainty pose threats to the animal protein sector.

Questions swirling in consumers’ heads include:

- Do I truly have control over my consumption?
- Do the people I’m buying from care about me?
- Do they care about the product?
- Aren’t they just in it for the money?

Overarching themes from the research are tied to “taking care of me and my family,” and include, “making sure I’m a good provider, making sure I’m physically strong and able” and other attributes you traditionally associate with animal protein. But it's the nagging questions above that represent important critical considerations for increased consumer engagement by the animal protein sector.

Concerns regarding environmental sustainability are also growing. While not top of mind for consumers, the topic shouldn’t be ignored as it remains a priority for investors, food companies, NGOs and others.

Going Beyond the Obvious

MotivBase Digital Ethnography

MotivBase uses AI observational anthropology to analyze millions of consumer conversations online in real time, going beyond direct mentions of a topic to truly understand the meanings of the entire universe of language consumers use to discuss a particular topic. In essence, MotivBase doesn’t just analyze directly-related words, but also analyzes words that are indirectly related. This approach provides a much broader context to fully understand consumer attitudes, fears, motivations and behaviors – unveiling the true cultural landscape and predicting emerging trends based on direct observation of consumers rather than relying on the well-meaning predictions of a handful of analysts. It’s a powerful tool that allows organizations to see both the threats and opportunities.

CFI and MotivBase partner to provide digital ethnography research, analysis and strategic guidance on important food system topics to CFI members.
Demographics

Younger, more diverse audience increasingly important

Those engaging the most about animal protein are between the ages of 18 and 44 and are mainly educated (having attended college/university) White and Hispanic consumers.

It may come as no surprise that younger consumers, who are more conscientious when it comes to food purchases, are more apt to be fearful and express concern. It is a surprise that this tension is tracking higher with White and Hispanic consumers. That wasn’t true a year ago. It’s new and evolving and worth monitoring.

Consumer Motivations & Fears

Representative Sample Ages 18 – 64 / Nearly 400,000 conversations analyzed

• See their identity as connected to how well they provide for and protect their families – financially, emotionally and even physically.

• Want to take care of their loved ones and want the world to see and acknowledge their hard work and sacrifice.

• Are suspicious of institutional motives – and avoid what corporations and governments tell them is the “right” thing to do. The “big is bad” factor comes into play as this audience believes corporations are only driven by profit.

• Value making their own decisions but also fear harming their health or the environment with their choices. One bad choice brings guilt, shame and regret – and potentially brand or category deselection.
The Zone of Innovation: 4 Emerging Opportunities

Catching the Perfect Wave

Four major opportunities stand out for the animal protein space as outlined by the MotivBase Zone of Innovation Framework.

This model identifies the best time to introduce innovation based on the level at which the demand space is understood and accepted in society.

The sweet spot – or the best time to introduce innovation – occurs when the maturity of a demand space falls between 33 and 55 percent on the adoption curve. In that zone, a demand space has become mainstream enough that companies have an opportunity to introduce innovation that is more likely to gain traction quickly. Think of it like catching that perfect wave.

In the Zone

Note: Italicized words and phrases indicate the language consumers actually use to discuss the topics.

1. Fresh and High Quality – Consumers want to focus on quality options
2. Stretching Meat Purchases – Consumers want to make less meat last
3. Ethically-Raised Animals – Consumers are questioning factory farms
4. Plant-Based Alternatives – Consumers evaluate plant-based choices
1. Fresh and High Quality

A key opportunity is consumer desire for high quality animal proteins, no matter the cut, because consumers view fresh, high-quality protein as healthier than low-end cuts. Among prevailing attitudes and behaviors:

- They see organic eggs and dairy from grass-fed cows as healthier because they’re higher in omega-3 fatty acids.
- They think that the local butcher sources better meat at a fairer price.
- They are researching raw preparations of meat, such as steak tartare, that highlight the meat’s quality.

Consumers share articles that claim that the fat profile and vitamin content of organic, grass-fed or free-range products are better.

2. Stretching Meat Purchases

Consumers facing financial uncertainty seek ways make meat last longer for their families, which means saving money and making fewer trips to the store. Among their attitudes and behaviors:

- Consumers are discussing ways to make meat purchases last longer by cooking more so-called poor people food.
- They share methods to render pork fat to use later and make stock from chicken bones after a chicken dinner.
- Consumers also discuss affordable yet delicious protein options, such as oxtails.
- They share recipes to make tough meat cuts more palatable.

More consumers are buying whole, processed animals from butchers, a big shift that runs counter to purchases of individually wrapped cuts.

In the News

From Cage Free to Grass Fed to Organic, What You Need to Know About Food Labels

Martha Stewart | June 13, 2020

It’s not just meat products you’ll spot with a grass-fed label these days. There’s also cheese and milk, chocolate, and more. Many grass-fed labels are simply a marketing label with no certification involved. Still, A Greener World, American Grassfed Association and the USDA do have grass-fed labels for meat products that require farms to feed animals a certain percentage of grass.

In the News

I Just Bought a Quarter of a Hog. COVID is Changing Everything.

Medium | May 22, 2020

We’ve been going to a local butcher, but the cost of buying beef by the pound is high. I think the quarter hog was worth it. We’re waiting on delivery, so I can’t speak to the quality — but if it’s anything like the meat that we’ve been buying directly from the same butcher, then it will be amazing.
3. Ethically-Raised Animals

Consumers question factory farms but they don’t want to give up easy, affordable animal proteins. Easy includes two attributes:

1. With animal protein it’s easier to get required protein and additional benefits like amino acids. (They believe getting the right amount of protein and other nutrients is tougher with plant protein.)

2. Animal protein, as in a simple cut of meat, is easy to prepare.
   Throw it on the grill, broil it, bake it.

Among their attitudes and behaviors:

- Consumers continue to express concern about supporting factory farms but they don’t want to give up meat entirely.
- They discuss the improved welfare standards for chickens who lay pasture-raised eggs, grass-fed dairy cows and wagyu beef cows, but these products are far more expensive than the cheap meat of factory farms.
- To save on ethical meat they focus on cheaper options like ground chuck and schedule some meatless meals.

Consumers see ground products like chuck and eggs as the most affordable way to source more ethical animal protein products.

In the News

It’s Time to Shut Down Industrial Animal Farming

The Hill | June 3, 2020

While presidents and governors will prefer to emphasize that the next deadly virus is controllable primarily through better detection, monitoring and quick response — which is, of course, essential, too — the only real way to truly safeguard society is to stop the industrial and factory farming of animals. All it takes is a willingness to reconsider how we consume, trade, and treat animals. Big ask? Maybe. But everything should be on the table when hundreds of thousands of lives are at stake.
4. Plant-Based Alternative Proteins

Consumers have conflicting feelings about plant-based proteins. Among their attitudes and behaviors:

- Consumers aren’t impressed with the taste of many plant-based alternatives, even when they’re looking to reduce meat consumption.
- They are drawn to new plant milks like oat and ground meat alternative options like Impossible Burger and Beyond Meat.
- They research the best vegan cheese but they find it only works for limited applications like vegan pizza or sprinkling on other dishes.

Consumers would like to reduce their overall animal protein intake, but they prefer the taste and texture of real animal products.

In the News

Plant-Based Protein and Fat Substitutes for Common Ingredients

MSN | May 29, 2020

It’s safe to say the plant-based diet trend has become a solid movement, with no signs of slowing down. If you’re one of the many consumers trying to eat fewer animal foods, you may have lingering questions about exactly how to use plant alternatives. Some exchanges are pretty straightforward, like nut milk in your cereal instead of cow’s milk.
What’s Next?

Consider these three pre-innovation zone opportunities that are worth keeping an eye on. They’re not quite at the 33 percent threshold on the maturity curve, but are poised to get there.

5. Avoiding Processed Foods

- Consumers want to eat more whole foods

Consumers see processed animal protein as high fat and an unhealthy food option.

6. Gut and Digestive Health

- Consumers want gut biome support

Consumers worry that excessive animal protein is harming their digestive health.

7. Essential Nutrients

- Consumers seek minerals and vitamins

Consumers see animal protein as the best source of iron, amino acids and key vitamins. In particular, they believe the form of iron in animal protein is far more bioavailable than the form found in plant-based products. They also see animal proteins as the only complete proteins without without supplementation.

Because these factors fall outside of the Zone of Innovation they may take longer to reach their potential. Additional effort would be required to help consumers create the demand space.
MEDIA TONE AND TRENDS
Traditional and Social Media Insights
Plant Protein Dominates Coverage

Animal protein is receiving less traditional and social media coverage and slightly more negative coverage than plant protein.

Comparison often offers the best way to gain perspective. To assess the media coverage of animal protein, we compared the traditional and social media coverage of animal protein and plant protein for 90 days between May 1 – Aug. 31, 2020.

Traditional Media

“Animal protein” (and related key terms such as animal-based protein) appeared 9,480 times in media outlets, including newspapers, magazines, broadcast stations and websites during the period. “Plant protein” (and related key terms) appeared in 19,510 times, more than twice as much as animal protein.

Reasons:

• Plant protein is a new and rapidly changing topic, naturally attracting more media attention.
• About 10 percent of coverage focused on the business and financial aspects of plant protein companies.

Examples:

• Getting Your Protein From Plants a Recipe for Longevity
  US News, July 13
• America’s Missing Beef Opens the Door for Plant-Based Burgers
  Bloomberg, May 8
• Coronavirus could propel plant-based Beyond Meat into a giant like Amazon or Facebook
  CNBC, May 7

Plant Protein

67%

Animal Protein

33%
Sentiment

Sentiment provides an indication of the overall tonality of any given article. Sentiment is determined by examining each article and categorizing the article's tone into either positive, negative or neutral based on natural language processing algorithms. It helps give context to the article and, holistically, provides an overview as to the tone of the topics.

It is expected that most media coverage will be neutral in tone, indicating objective journalism. Both plant and animal protein received similar amounts of positive coverage. However, it is notable that animal-based protein shows more negative coverage. At three percent, it’s not an excessive amount but it does indicate a tone that reflects underlying consumer attitudes. Continuing to monitor the level of negative media coverage in the next few months will provide more insight. If unfavorable media attention continues to grow, a proactive strategy about animal protein could help balance the conversation.
We identified three main topics that were the focus of negative coverage: Sustainability, Health, and Cost/Supply.

**Sustainability**

- There’s No Such Thing as Sustainable Beef Medium, May 18
- Soaring methane emissions threaten to put climate change goals out of reach NBC News, July 14

**Health**

- Want to live longer? Cut the meat, pass the pasta Salon, July 20
- As coronavirus threatens meat supply, we should embrace healthier alternatives USA Today, May 21

**Cost/Supply**

- Consumers paid more for groceries in May as meat got more expensive CNN, June 10
- Farmers will have to kill millions of pigs as meat plants stay closed Yahoo, May 15

Animal protein did receive some positive media coverage. Most of these positive stories focused on the nutritional benefits of animal protein.

- Meat-eating boosts muscle health better than plant-based diet as we age, study suggests Daily Mail, July 12
- Milk consumption linked to lower risk of diabetes and hypertension, study shows Atlanta Journal-Constitution, June 9
**Meat and Milk in the Media**

Most people don’t talk about “animal protein” as a group. We refer to the familiar products we use in our everyday lives. CFI analyzed the media coverage of specific animal proteins meat, beef, pork, chicken and turkey, and milk and cheese.

**Meat**
- News Media Coverage: 43,800
- Neutral: 91%
- Positive: 7%
- Negative: 2%

**Beef**
- News Media Coverage: 15,400
- Neutral: 92%
- Positive: 5%
- Negative: 3%

**Pork**
- News Media Coverage: 11,100
- Neutral: 90%
- Positive: 5%
- Negative: 5%

**Chicken and Turkey**
- News Media Coverage: 22,900
- Neutral: 87%
- Positive: 12%
- Negative: 1%
Combined, media mentioned these specific animal proteins more than 123,000 times during the period, about five times more than the term of plant protein or plant-based protein. As the ethnographic research found, animal proteins continue to serve as a foundation of the diet and many consumers prefer them. Chicken and turkey media attention claimed the most favorable spot among these specific animal protein products. Meat, used as a general term and not referring to a species, was also largely positive. Beef, pork and milk and cheese followed sentiment trends similar to animal protein. Supplies of beef, pork and milk were most significantly affected by supply disruptions in connection to COVID-19, which accounts for most of the difference in sentiment.

Social Media

In social media postings, the trend continues with plant protein receiving more attention, but animal protein receiving more negative postings.

Social media, including platforms Twitter, Instagram, Facebook, YouTube and Reddit, are venues for sharing opinions, so it would be expected that both animal protein and plant protein received a higher percentage of negative postings. What’s interesting is plant protein received considerably more positive treatment (26.8 %) than animal protein (10.4 %). Those who advocate for plant-based protein may be more deliberate in promoting their beliefs, as well as specific plant-based brands. Social media influencers discussing animal protein are divided into diverse focus areas, such as dairy, eggs, meat, etc. The gap indicates an opportunity to engage with social media influencers to generate additional positive postings about animal protein.
Social Media Influencers

We identified influencers engaging on animal protein to provide an overview of conversations taking place on social media.

Animal Protein Influencers

@CarrieDennett
Weight inclusive registered dietitian, certified intuitive eating counselor who helps people be healthier without dieting.
1,629 Followers | Contributed article to Seattle Times

@RDValerie
Dietitian who is pro animal foods and does not believe mainstream information is always accurate.
10,700 Followers

steakandbuttergal
A former vegan who is now a carnivore with a YouTube channel that encourages eating steak.
7,897 Followers

Plant Protein Influencers

@KellyJonesRD
Board Certified Sports Dietitian who believes in plant-forward performance nutrition.
2,282 Followers

Deliciouslyella
Promoting plant-based living with a line of products including cookbooks, an app, podcast, granola, energy balls and more.
1,900,000 Followers

nutritionstripped
Registered dietitian who believes health is a daily practice that starts with nutrition and supports nourishment based in plants and mindful eating.
357,000 Followers
THE PATH FORWARD

Potential approaches to leverage an evolving landscape
Consumers sit squarely in the driver’s seat as the nation continues to adapt to the evolving reality of the pandemic. Following the lead of consumers provides the food system with the best chance for long-term success as consumers adopt new – and perhaps long-lasting – behaviors.

The MotivBase Zone of Innovation clearly details four trends in the “sweet spot” – ripe for innovation and consumer engagement. Already, some innovators are actively working to meet consumer expectations with products that give consumers permission to enjoy the animal protein they crave.

Consumers engaging on the topic of animal protein want assurances that they’re making the right decisions for themselves and their families – that they’re providing high quality, affordable protein produced in an ethical manner.

**Key Takeaways**

- Consumers see the nutritional benefits of unprocessed meat but express concern about ethical farming practices. This, in part, drives interest in meat alternatives. They need permission to believe animal protein production aligns with their values so they can feel good about consumption.
- The desire to make high quality animal protein “go further” provides an opportunity for both innovation and stronger, more meaningful engagement.
- The U.S. system for producing animal protein is designed to drive efficiency and throughput, but it is largely not consumer driven and doesn’t take into account the broader focus and new priorities for consumers, investors, policy makers and other key stakeholders.
TAKE ACTION

Stretching Meat Purchases

• Use creative strategies to connect to your key market segments that provide novel and interesting options for stretching the meat dollar. Take advantage of the channels, messengers and messages your consumers already trust. Chefs, influencers and a host of others can help you connect.

• Leverage this new interest to create lasting relationships with your target consumer.

Fresh and High Quality

• Demystify the meat and dairy cases and demonstrate the wide array of available products. Emphasize availability and ease of preparation, regardless the cut.

• Leverage “locally grown,” which could include a multi-state region.

• Bundle quality meat with other healthy foods – especially low-carb, vegetable-forward or keto options.

Make it Personal

• Find ways to be more consumer-centric without losing the benefits of efficiency. Consumers want healthy and affordable options – with an eye toward boosting immunity. Provide more options, while maintaining efficient production and processing.

• Increase investment in product development that highlights the nutrient dense profile of animal protein, focuses on ease of preparation and allows the consumer to play a role in preparation.

• Kitchen fatigue is growing. Step up and maintain engagement to provide creative and fun new options for cooking animal protein at home.
TAKE ACTION

Make it Ethical

- Own the high ground on animal well-being, worker care, environmental impact and other issues that could drive animal protein consumers to alternatives.

Essential Nutrients and Health

- Lean into the concern that “too much” animal protein is bad for gut health. Provide information and options for those concerned, especially with dairy.
- The demand for healthy protein remains high. It provides a nutrient dense source that meets dietary needs. Address concerns, don’t risk alienating your core consumer by dismissing concerns.
- Embrace growing interest in immune health and the importance of a healthy diet. These are drivers for the foreseeable future.

Engage Emerging Audiences

- Consider testing the waters by engaging the new demographic showing heightened interest in the animal protein space - educated White and Hispanic consumers. Develop a specific Gen Z strategy.
Meet the CFI Consumer Trust Insights Council

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