Tomorrow's Meat

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Hello. This is Project Kaizen 2

We are identifying the future cultural context of meat and six consumer innovation platforms to drive tomorrow's growth for Ireland's meat

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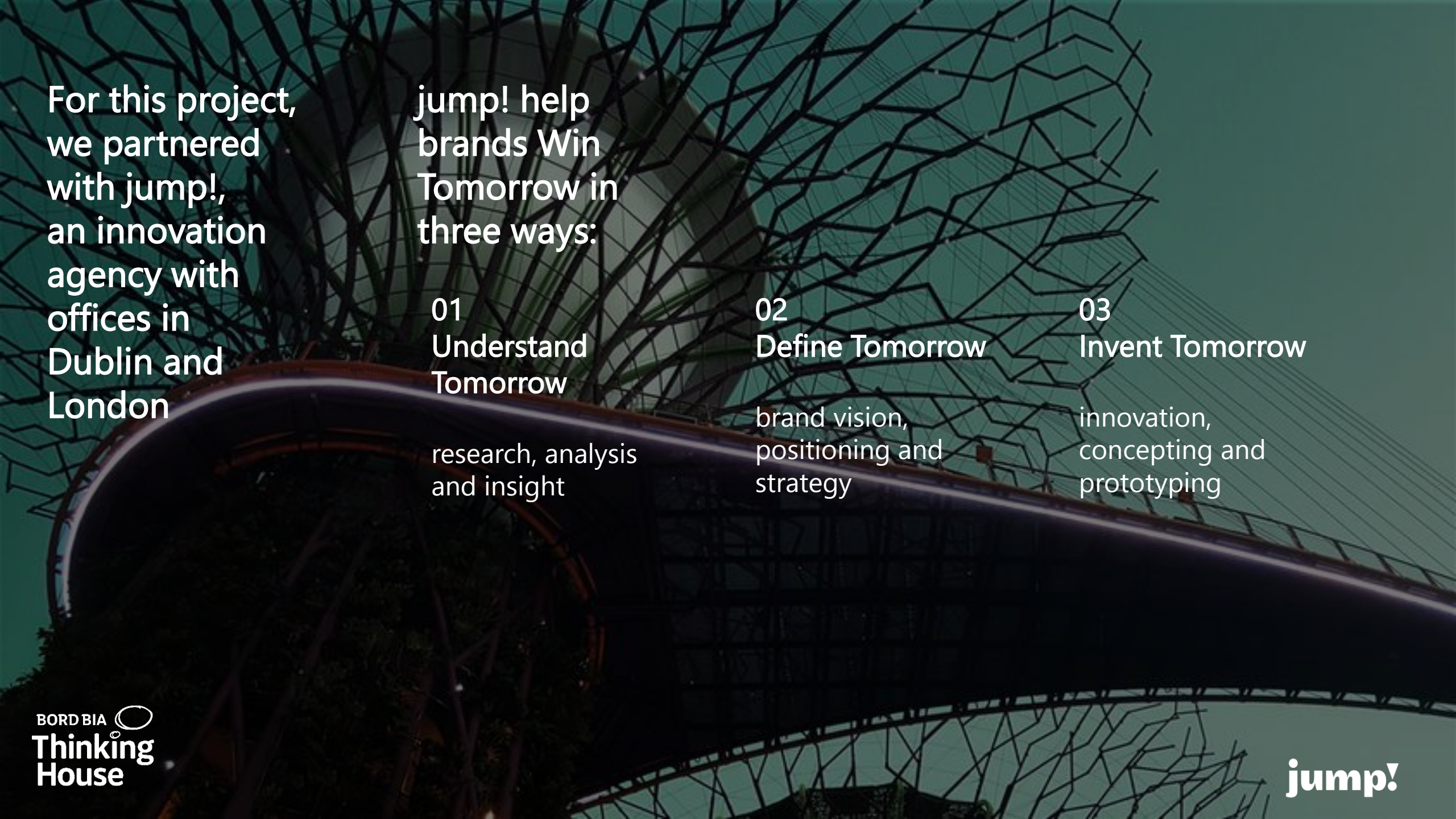

For this project, we partnered with jump!, an innovation agency with offices in Dublin and London

jump! help brands Win Tomorrow in three ways:

01
Understand Tomorrow

research, analysis and insight

02
Define Tomorrow

brand vision, positioning and strategy

03
Invent Tomorrow

innovation, concepting and prototyping

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This project is based on a mix of research, analysis and innovation methods

01
Understand Tomorrow

jump! SIGNALS: Futures Analysis identifying future context and emerging people needs

Expert Consultations

Qualitative research (Irl. 20-40 meat eaters) to sense check and refine

02
Define Tomorrow

Future consumer scenarios brought alive through a set of '2030 Future Stories'

Quantitative Research evaluation of Future Stories and Indicative Products (Irl + UK, 1,000 20-50 year old Adults)

03
Invent Tomorrow

Innovation Platforms, Focus Areas and Communication Codes

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We interviewed a diverse range of experts in to stimulate new thinking on future opportunities



Prof. Jayson Lusk
US

Economist, distinguished Professor and Department Head in the Department of Agricultural Economics at Purdue University. He has published more than 200 journal articles in peer reviewed journals.



Matt Chatfield
UK

Founder of the Cornwell Project, an initiative that links regenerative farmers with high-end London restaurants.



Didier Toubia
Israel

CEO Aleph Farms, an Israeli cell grown meat start up responsible for growing the first lab-grown meat from space.



Diana Rodgers
US

Dietician and nutritionist living and working on an organic farm west of Boston. She is an advocate of meat-eating and currently working on a book and documentary film project exploring the role of animals in our food system.



Fabio Ziemssen
Germany

Founder and innovation director at NX-FOOD, a company aimed at inspiring food innovations, developing food systems and promoting sustainable living.

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And our SIGNALS: analysis assessed a wide range of robust data sources to identify emerging futures



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This Project Kaizen 2 report tells a two-part story of tomorrow's innovation opportunities for Ireland's meat

Cultural Context

We explore the rapidly changing cultural context driving tomorrow's expectations for meat purchase decisions and meat eating behaviours.

Innovation Platforms

We identify six consumer needs, central to meat eating, that are set to change.

Each of these are an Innovation Platform: an inspiring start point for purposeful innovation.

Each Innovation Platform is backed up with Innovation Focus Areas and Communication Code.

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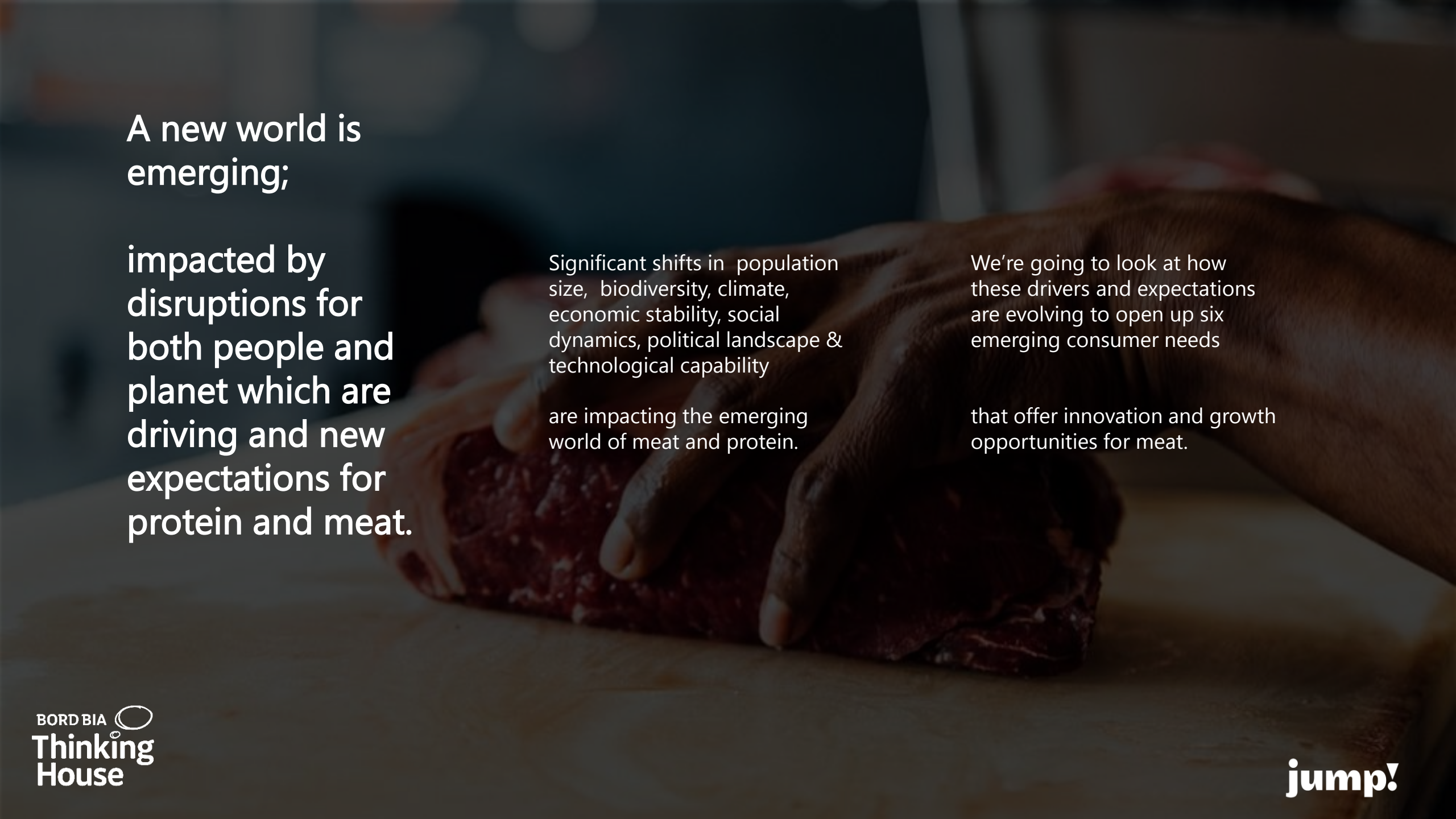

A new world is emerging;

impacted by disruptions for both people and planet which are driving and new expectations for protein and meat.

Significant shifts in population size, biodiversity, climate, economic stability, social dynamics, political landscape & technological capability

are impacting the emerging world of meat and protein.

We're going to look at how these drivers and expectations are evolving to open up six emerging consumer needs

that offer innovation and growth opportunities for meat.

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A new world is emerging;

impacted by disruptions for both people and planet which are driving and new expectations for protein and meat.



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People

Macro changes that are emerging among people and culture

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World population is 7.8 billion as of December 2019

The current world population is 7.8 billion as of December 2019 according to the most recent United Nations estimates.

Source:
http://www.worldometers.info/



As developing economies continue to expand, social classes will adjust and spending powers will increase

3.5 billion

The projected increase of middle-class consumers between 2009 – 2030

Source:
European Commission 2018
https://ec.europa.eu/

A growing dependence on technology has created an ‘always on’ culture



63%

The global increase of electric vehicle sales in 2018 over the previous year

Source:
IEA Global EV Outlook 2019

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Wearable technologies (Smartwatch, Earwear, Eyewear) are forecast to grow 11% cagr 2019-25

As technology grows more and more central to people's daily life, expectations of seamless service and functionality will rise rapidly

Source:
https://www.globenewswire.com
jump!
Image:
https://www.insurancebusinessmag.com/uk/opinion/wearable-technology-going-out-on-a-limb-29264.aspx

New wellness music festivals like Wanderlust in the UK are rising in popularity

These new festivals combine the mental elation of a festival with the physical euphoria of a workout.



Image: https://gympluscoffee.com



More people are enjoying the visceral thrill of adventure sports

20%

Growth in Adventure Sports Participation in England, 2016 to 2018.

Source: Statista.com

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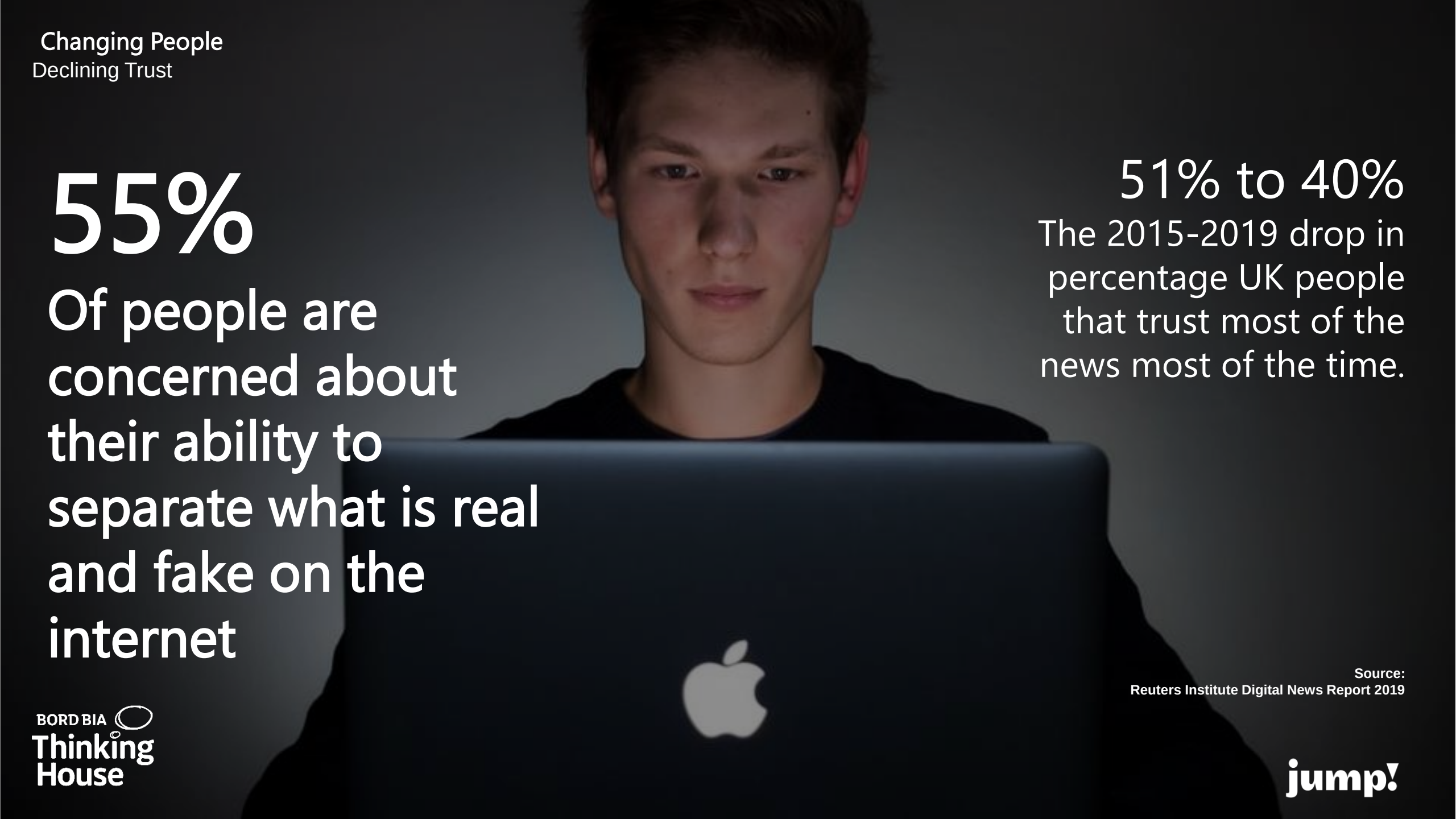
In the year of Brexit negotiations; Trump impeachment; Hong Kong riots; the political outlook has remained uncertain



Changing People
Declining Trust



55%

Of people are concerned about their ability to separate what is real and fake on the internet

51% to 40%

The 2015-2019 drop in percentage UK people that trust most of the news most of the time.

Source:
Reuters Institute Digital News Report 2019

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Planet

Macro environmental changes emerging across the globe

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As carbon emissions increase, so too does the Earth's temperature

2015-2019

The warmest five-year period since records began in 1850

Source:
Climate Central, The 10 Hottest Global Years on Record, 2019

As climate change escalates, people feel increasingly threatened by its effects



67%

People globally feel that climate change poses a direct threat to the safety of their nation, more than terrorism and cyberattacks

Source:
PEW Research Center, Climate Change Still Seen as the Top Global Threat, but Cyberattacks a Rising Concern, 2019 https://www.pewresearch.org/

Changing Planet
Conscious Travel

2019 UK Pinterest travel searches showed a strong increase in ‘staycations’ and destinations ‘closer to home’

74%

Increase in Pinterest search's for Zero Waste Travel

Source: https://newsroom.pinterest.com/en/node/5601

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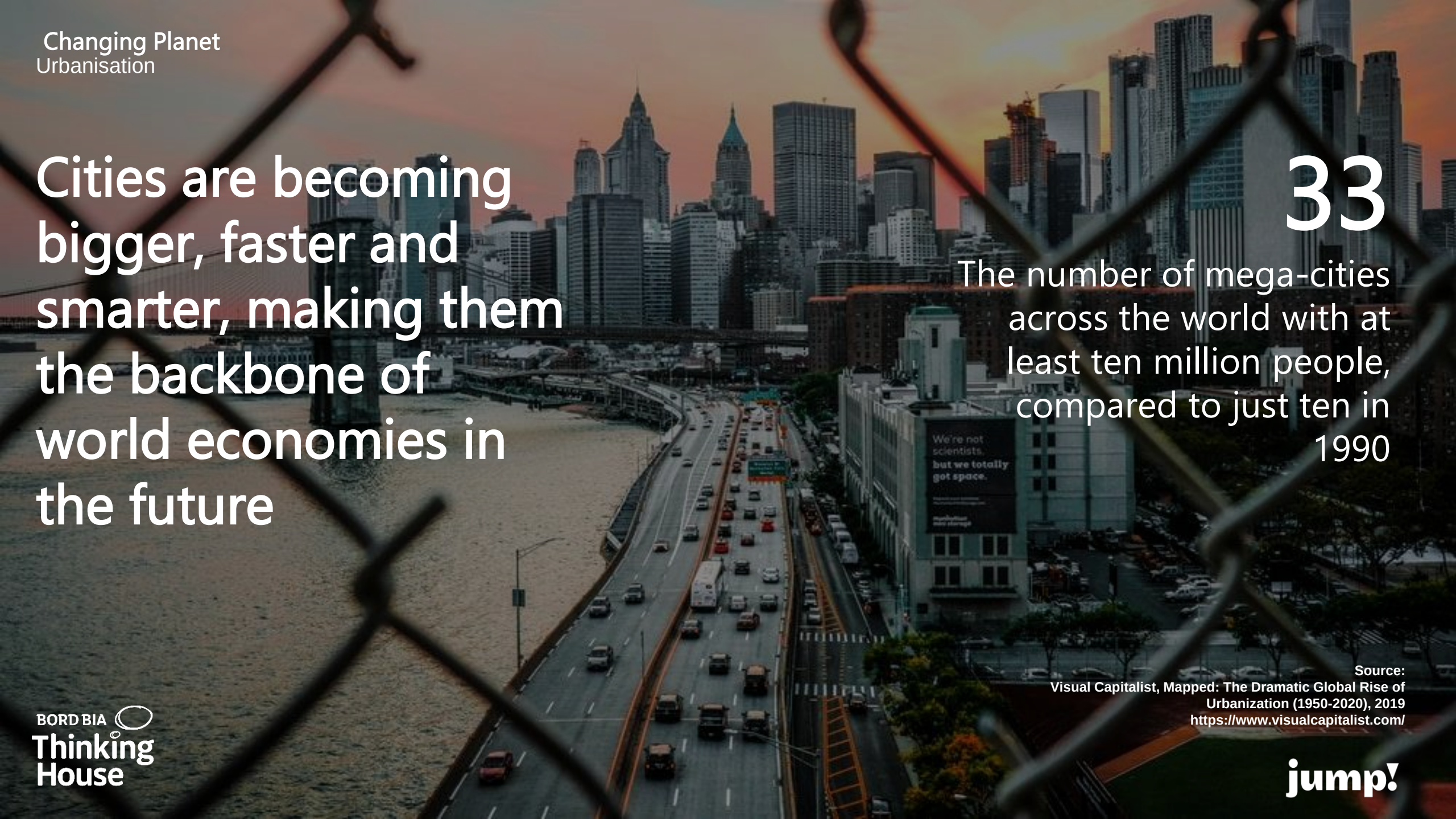
As plastic remains a key concern in 2020, people will demand package innovation

800%

The reported increase of customer queries about plastic in Waitrose following BBC's Blue Planet II documentary

Source:
The Guardian, Third of Britons have stopped or reduced eating meat, 2018

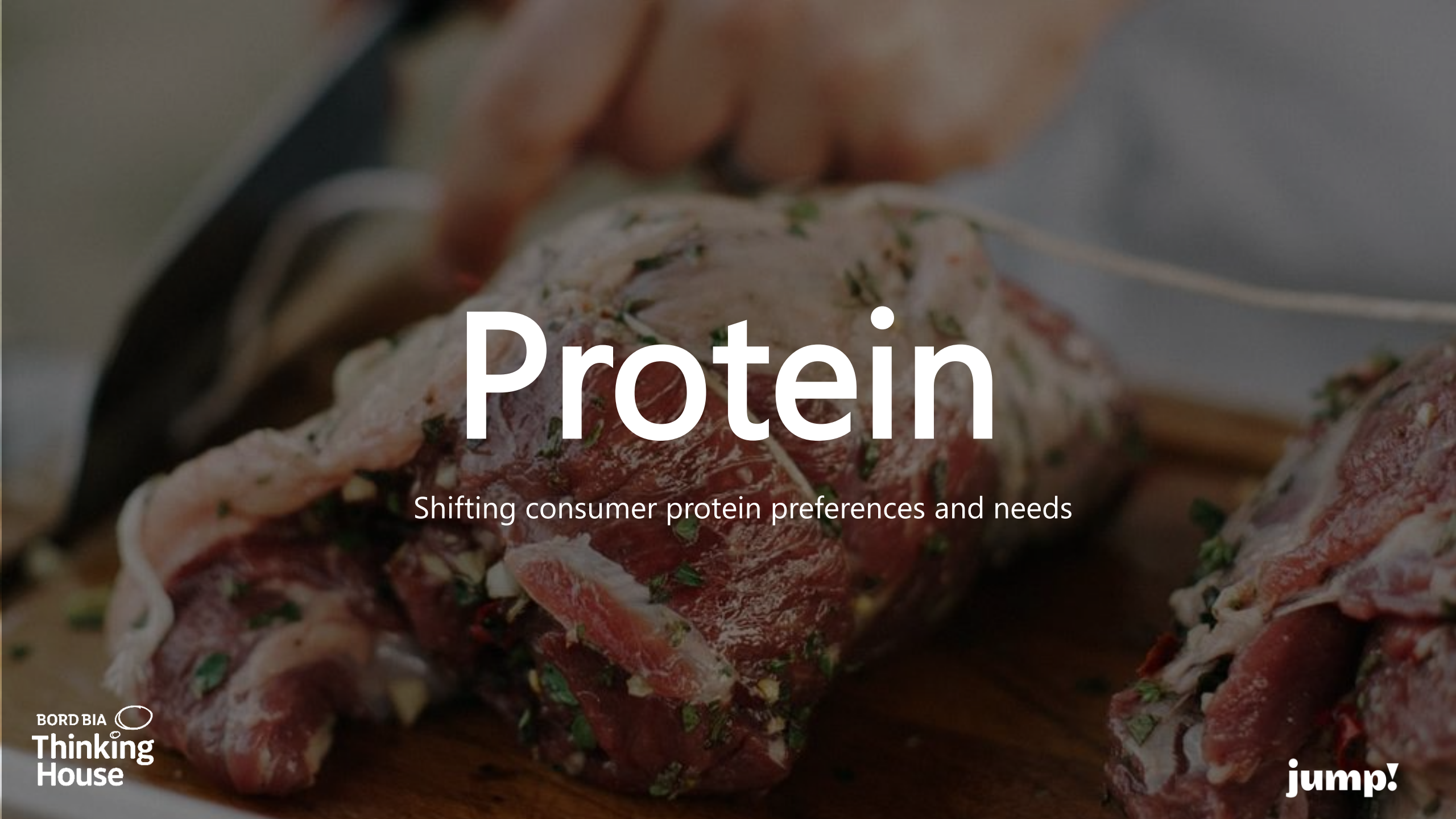
Cities are becoming bigger, faster and smarter, making them the backbone of world economies in the future



33

The number of mega-cities across the world with at least ten million people, compared to just ten in 1990

Source:
Visual Capitalist, Mapped: The Dramatic Global Rise of Urbanization (1950-2020), 2019
https://www.visualcapitalist.com/



Protein

Shifting consumer protein preferences and needs

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Protein has strong health associations worldwide

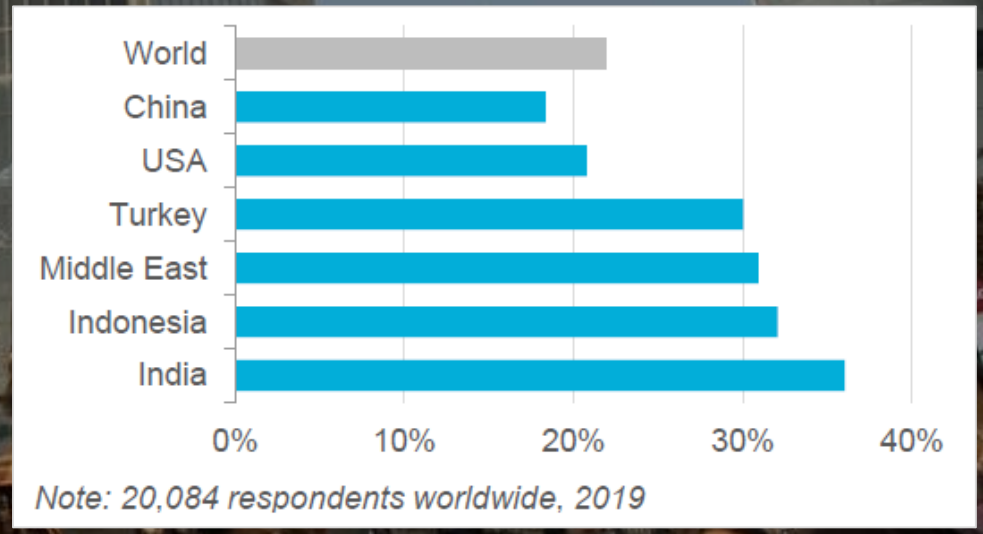
One in four people consider healthy to mean high protein

Source:
Global Data 2018

Changing Protein
Desire for More

Over a fifth of the adults worldwide are actively trying to increase their intake of protein. +17% forecast 2013-23

Agree I'm Trying to increase my consumption of protein



Euromonitor Future of Meat 2019

Source:
Euromonitor: Euromonitor Packaged Food Future of Meat 2019

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$945.7bn

2018 estimate of global meat sector value. Forecast to grow 3.9% CAGR 2018-23

Growth driven by population as well as increasing urbanization which encourages the development of cold chains and through this, the trade of perishable goods.

Source:
Euromonitor: Euromonitor Packaged Food Future of Meat 2019
Global Data 2019 Future Meat Opportunities

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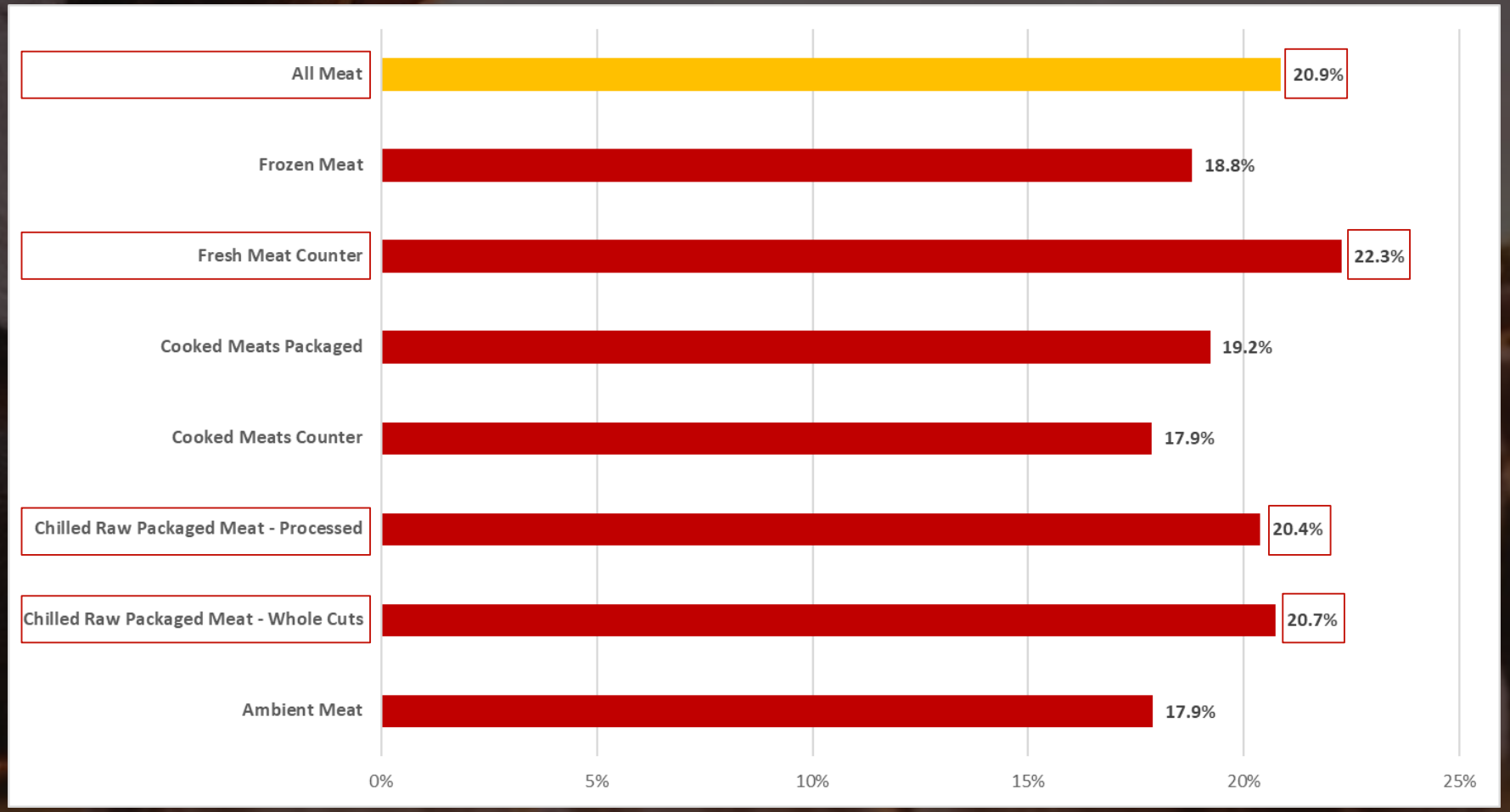
Over 2018-23, Global Data forecast an 8% growth in volume (KGs) and almost a 21% growth in value



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In an analysis of 50 markets, Global Data identified a set of high potential markets for meat, based on size, growth, socio-demographic, governance and technology factors



Source:
Global Data 2019 Opportunities in the Global Meat Sector

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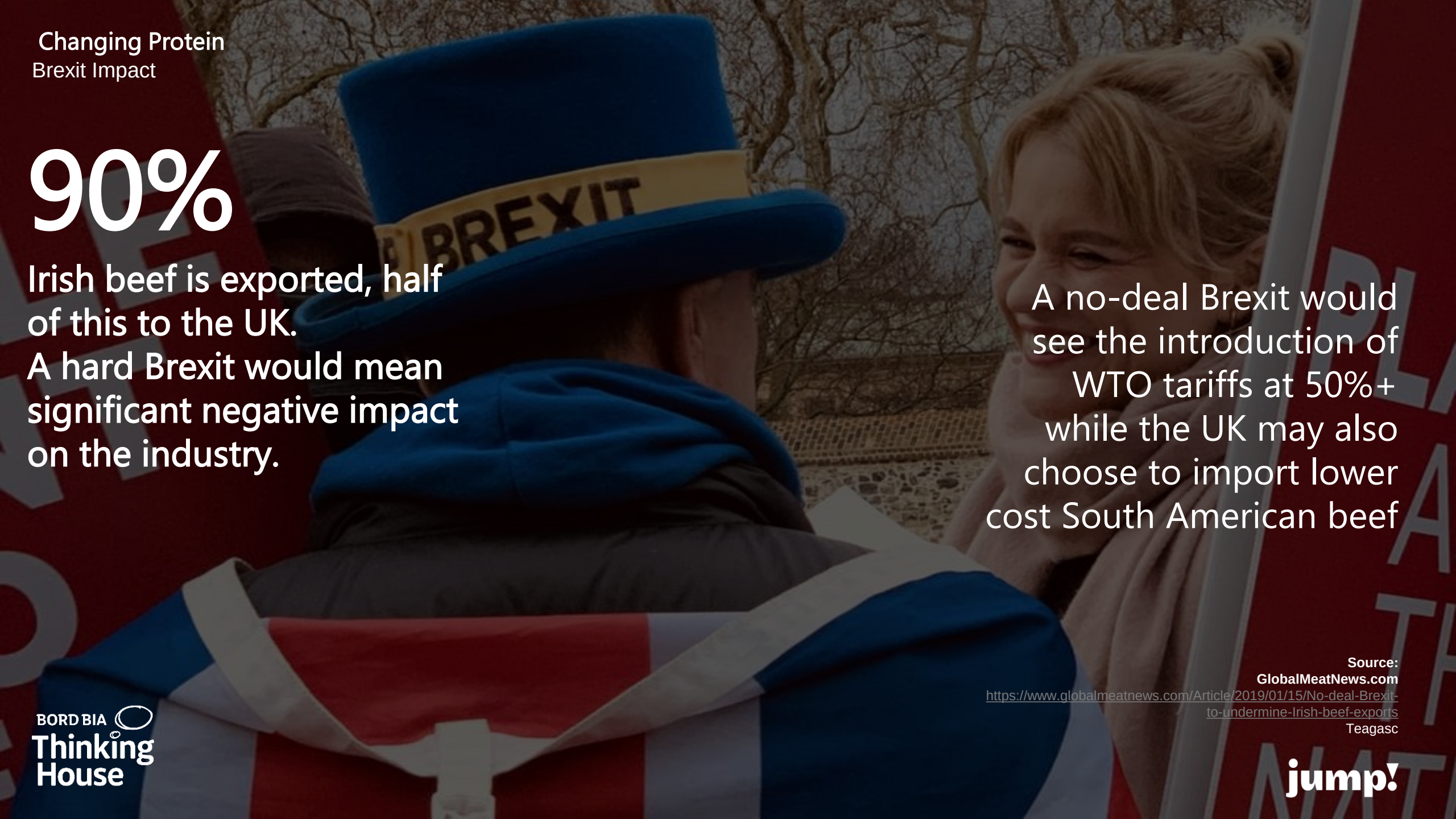
Changing Protein
Brexit Impact

90%

Irish beef is exported, half of this to the UK.
A hard Brexit would mean significant negative impact on the industry.



A no-deal Brexit would see the introduction of WTO tariffs at 50%+ while the UK may also choose to import lower cost South American beef

Source:
GlobalMeatNews.com
https://www.globalmeatnews.com/Article/2019/01/15/No-deal-Brexit-to-undermine-Irish-beef-exports
Teagasc

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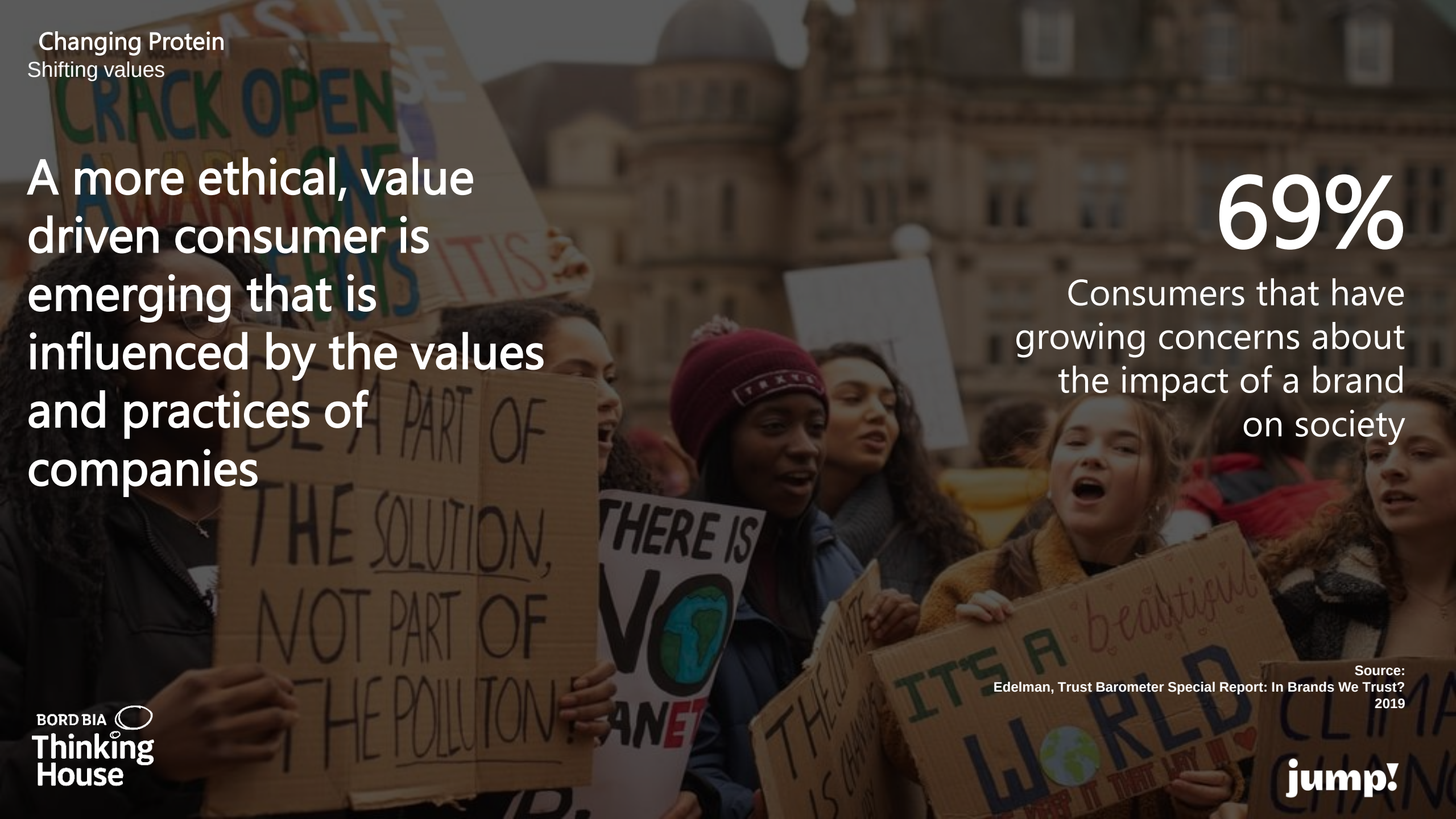
A more ethical, value driven consumer is emerging that is influenced by the values and practices of companies



69%

Consumers that have growing concerns about the impact of a brand on society

Source:
Edelman, Trust Barometer Special Report: In Brands We Trust? 2019

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The growing concern for the environment is shifting people's perception of meat



44%

European adults 18-35 consider meat consumption to be harmful for the environment[5]
(ING Economics Department, 2017)

Source:
ING Economics Department, The protein shift: will Europeans change their diet? 2017

Veganism continues to grow , driven by climate change fears, healthy lifestyles & attitudes towards animal welfare.



The number of U.S. consumers identifying as **vegan** grew from **1% to 6%** between 2014 and 2017, a 600% increase, according to Global Data.

Source:
Forbes, The Growing Acceptance of Veganism, 2018



Research is showing that people are more likely to reduce, rather than cut out meat in their diets

95%

People who purchased plant-based burgers also ate meat

Source:
MarketWatch, Good news for Beyond Meat? 95% of people who order vegan burgers when dining out aren't even vegetarians 2019



Of 11 major food categories surveyed, US consumers identified Meat as the food where transparency is most important

78% US adults see transparency as important for meat

Source:
Label Insight Transparency ROI Study 2016

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While all diets come and go through time, there's been a resurgence in the 100 year old, high-fat low-carb keto diet

1011%

The growth in Google searches of Ketogenic diets between 2016 and 2018

Source:
The Keto Craze, Kerry Report
https://www.kerry.com/europe-en/sitecore/content/kerrysite/pages/insights/kerrydigest/2018/the-keto-craze-charting-growth-and-identifying-keto-product-gaps

28%

US, UK and Chinese consumers have experienced a shift in their tastes towards more exotic or adventurous flavours in snacks



7 in 10 US consumers “love to discover new flavours”

Source:
Innova Market Insights:
https://www.foodingredientsfirst.com/news/Whats-going-to-be-hot-in-2019-Adventurous-and-plant-based-eating-to-accelerate-increased-calls-for-transparency-tipped-to-dominate.html

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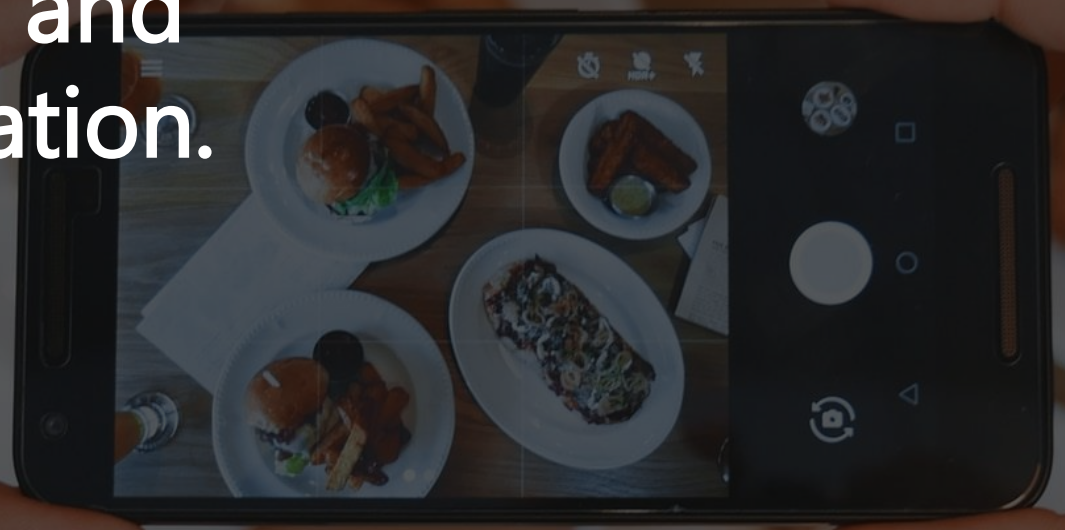
Social media continues to grow as a platform to share recipes and find food inspiration.



62%

Of foodies share recipe videos with friends and family via messenger, WhatsApp, and Facebook groups

Source:
The Drum 2019
https://www.thedrum.com/opinion/2019/11/08/foodporn-social-media-the-future-food

People are posting every aspect of their lives on social media, especially their food, including meat, choices

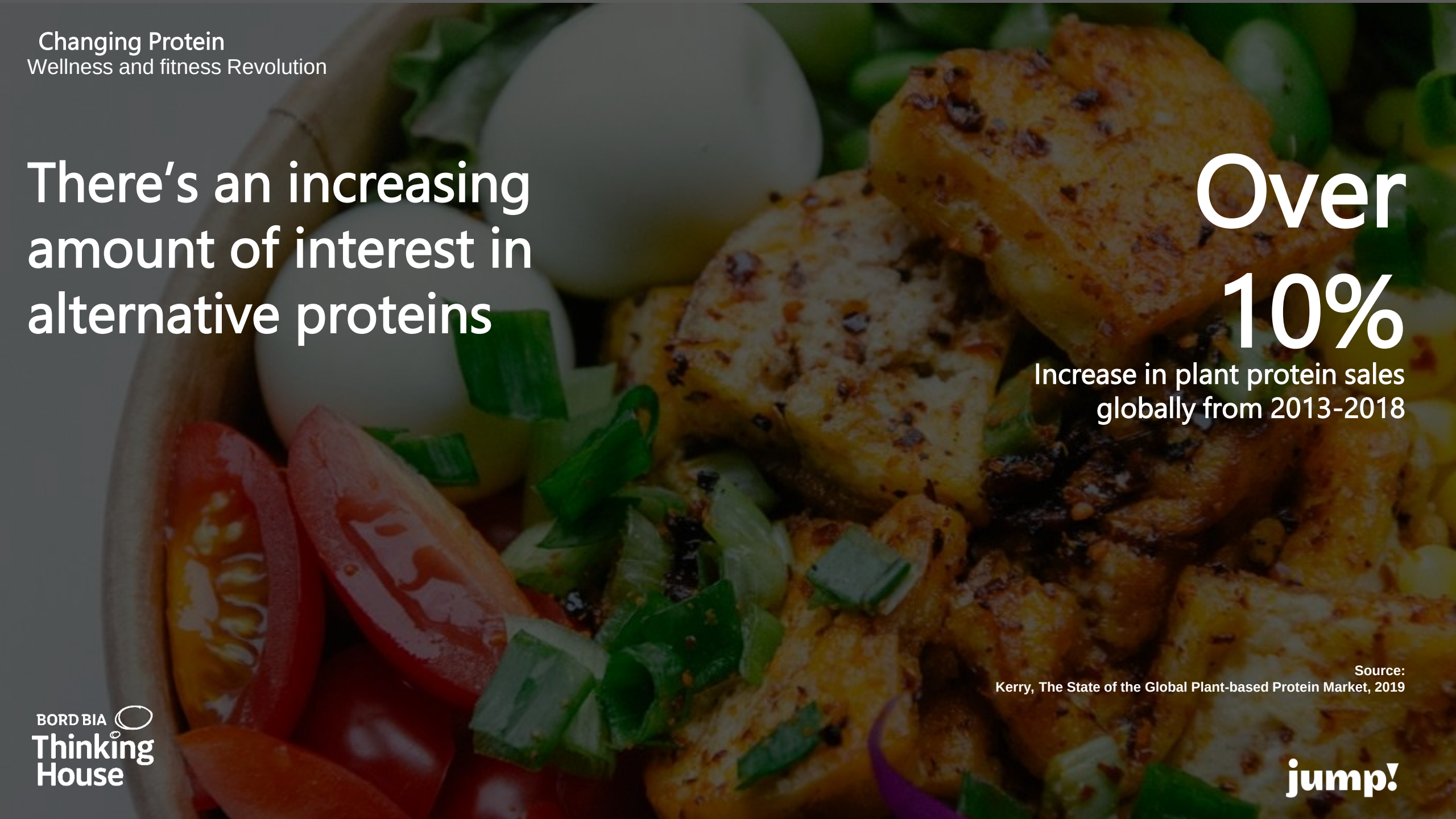


The 10 most Instagrammed world foods (2019)

1. Pizza – 37,900,000 Posts
2. Hamburger – 35,000,000 Posts
3. Sushi – 23,600,000 Posts
4. Steak – 10,200,000 Posts
5. Macarons – 5,000,000 Posts
6. Pho – 2,700,000 Posts
7. Lamb – 2,300,000 Posts
8. Fried Chicken – 2,100,000 Posts
9. Pesto – 1,700,000 Posts
10. Poke – 1,500,000 Posts

Source:
RTE 2019
https://www.rte.ie/lifestyle/food/2019/0617/1055735-here-are-the-most-instagrammed-foods-in-europe-and-the-us/

There's an increasing amount of interest in alternative proteins



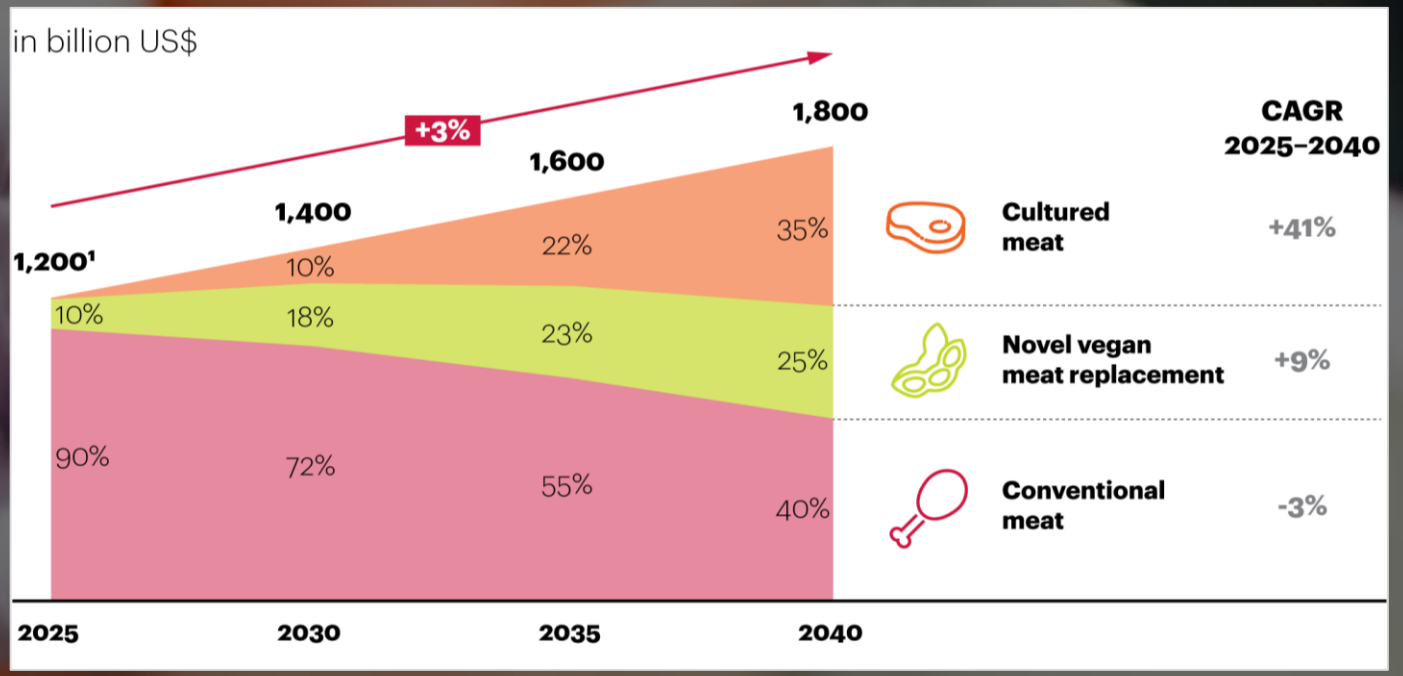
Over 10%

Increase in plant protein sales globally from 2013-2018

Source:
Kerry, The State of the Global Plant-based Protein Market, 2019

Changing Protein
Alterative meat disruptors

It's predicted that by 2040, more than a third of all meat consumed will be lab-grown



Source:
AT Kearney Cultured Meat 2019 (incl. UN / World Bank Expert Interviews)

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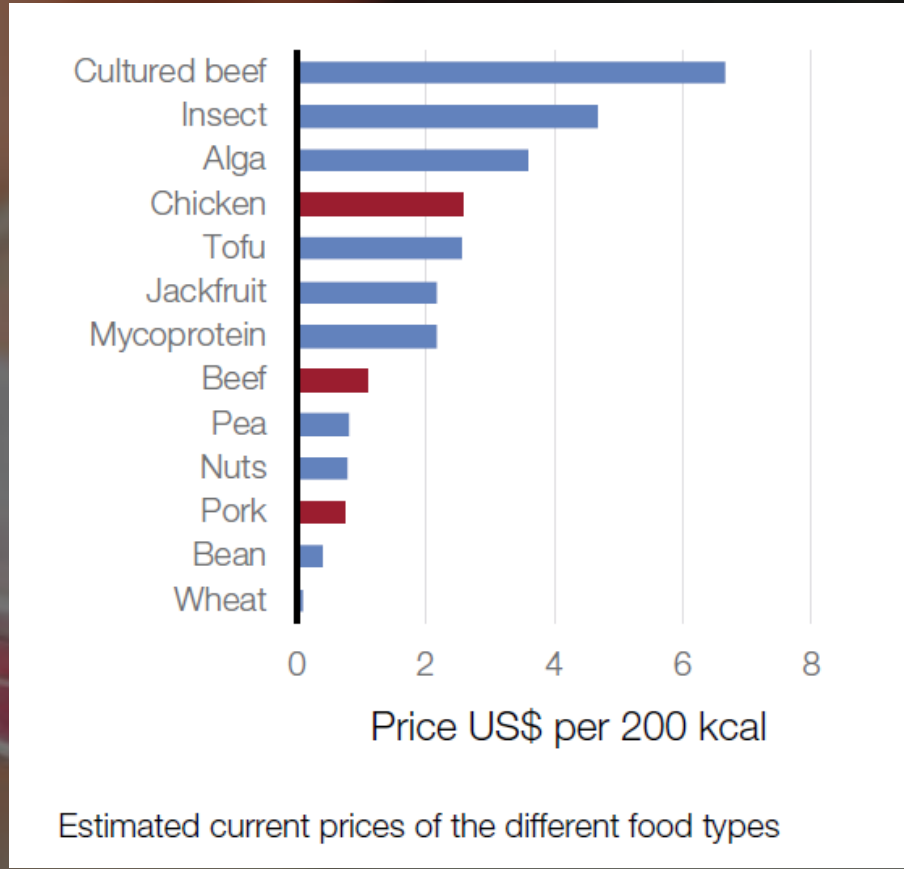
Meat currently holds a price advantage currently vs. cultured and insect protein

but this may erode and it is therefore critical to also create functional and emotional advantage.



Estimated current prices of the different food types

Source:
World Economic Forum: Roadmap for Delivering 21st Century Protein 2019

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At the moment, meat is still king

228m vs **6.4bn**

Annual number Veggie Burger vs. Beef Burger sold in US Quick Service restaurants y/e May 2019. That’s 3.5%

Source:
NPD, Quick Service Burger Buyers Mix It Up Between Plant-Based and Beef, 2019

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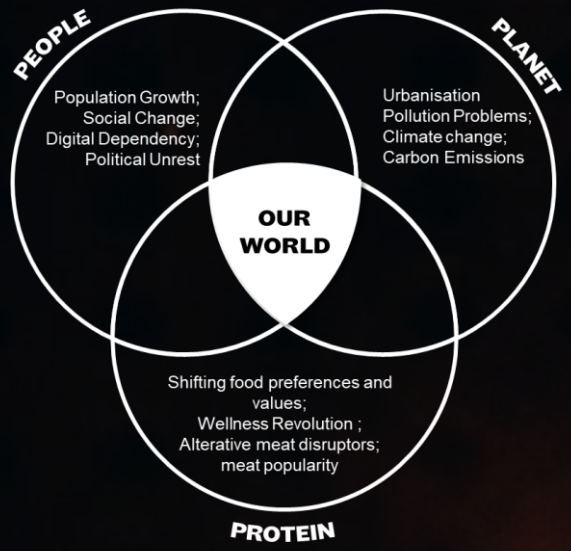

This emerging cultural, environmental and food context will drive evolving consumer needs.

For example, our SIGNALS: analysis highlights key cultural shifts that include:

- Declining Trust in news sources
- Heightened desire for transparency in meat
- Growth in Wellness Festivals
- Growth in demand for exotic snacks
- Rise of 'conscious travel'
- Growth in wearable technology
- Growth in adventure sports

These People, Planet and Protein changes point to six evolving consumer needs that will be central to meat purchasing and eating in the coming years:

1. Mouth-watering Transparency
2. Healthy Indulgence
3. Conscious Enjoyment
4. Eclectic Discernment
5. Super-charged Convenience
6. Primal Satisfaction

We need to be at the cusp of these rising needs.

The following slides will explore each need and the meat Innovation Platform each offers.



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We're focusing on opportunities in tune with emerging needs and new meat expectations.



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Changing consumer mindsets and expectations point to key innovation opportunities for the future of meat.



Constant Consumer Meat Needs =

Current Consumer Expectation =

Emerging Consumer Expectation =

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Mouth-watering Transparency

People want to know everything about everything and will switch their spending to brands and businesses that feed this need. Security; Trust; Taste.

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30%

Spirits Europe estimate that 30% of ‘Scotch Whisky’ sold in China is fake.

Source:
Scotch Whisky Association, 2013

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50%

of birds in US are now produced in “no antibiotics ever” (NAE) programmes.

Source:
Poultry Health Today, 2019

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1. TRANSPARENCY

...truthful interactions

Current
Consumer Expectation

Functional

Top line truths that reassure

As we become removed from the sources of food production, from Galway to Shanghai, people want to know the truth of their purchases.

Emerging
Consumer Expectation

Mouth-Watering

Up-close truths that convince

Driven by real-world crises in Baby Milk and African Swine Flu (China) and Horse Meat and Lysteria (Europe); by concerns over air miles and provenance; fraud and security; appreciation of workers' and producers' rights as well as earth-friendly practices…and all backed up by a continuing decline in trust,

radical transparency is becoming a key consumer decision-point.

Tomorrow's Insight-led
Opportunity Platform

Mouth-Watering Transparency

We have an opportunity to bolster our reputation, and therefore volume and value, as producers of some of the world's best meat, by proudly letting the world in to our farms and businesses.

Truth tastes better.
This is about enhancing the dream people have of our meat through the unabashed sharing of our processes; traditions; expertise; ambition.

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Mouth-Watering Transparency

A Future Story from 2030

In this future, following several food scares, public demand and legislation will mean food producers will be obliged to disclose their entire production process online.

Every detail about meat production must be shared, and companies will be independently rated by consumers who will be able to buy directly from the farmers and producers they believe in most.

When buying any kind of meat, we're now able to see how our purchase was raised, prepared and packaged. We can also order directly from the farmer and be satisfied that animals are raised in a way we're most happy with.

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Project Kaizen 2 Consumer Research 2019:
20-39 Meat Eater, Ireland

"I feel all that [Transparency Future Story] is excellent. It's a good idea to know where your food is coming from and the fact you can source the ingredients and know the entire production process."

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Emerging Consumer Insight

People want to experience the truth behind their choices.

We see this in the popularity of investigative videos on Netflix and YouTube (e.g. food & clothing); on social sites when revealing public spending or when calling out celebrities for certain behaviour.

Consumer Type

30+ and their families

Proactive on health and environment

Working hard to improve their prospects, to carve out their desired life and lifestyle

jump!

Mouth-Watering Transparency

Opportunity Areas



Waste Not

Consumers increasingly equate how you deal with waste/recycling with a brand's identity and values.

There is a rising demand for understanding and being able to appreciate how waste-free and innovative companies and brands are.



Who? What? Where?

Across sectors, there is a rising interest in the stories of the processes and people behind products and brands.

Who are the people, often behind the scenes, working hard to ensure quality. We see stories appearing in ads, communications and social media campaigns.



Technological Transparency

From blockchain to simple apps and AI-enabled QR codes, technology is enabling people see brand's complete production system and quality measures.

Consumers enjoy this more informed position and in sectors like meat and fashion, are starting to demand more, often one-click, access.

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Products and Brands tapping into Mouth-Watering Transparency



La Viande et La Terre

France is set to introduce a law forcing all food establishments that fall under the catering and restaurant industry to tell customers where all their meat products come from.



Silver Fern Farms (NZ)

Silver Fern Farms, a New Zealand-based red meat producer, will add a QR code on its packaging as part of its traceability program, allowing consumers to track where the meat comes from and the quality of its environment.

The rollout of the full QR code traceability functionality will be completed in early 2020.



Food Trust Network

Alibaba wants customers to be able to access the journey of each edible product from the moment it grows on a farm to the moment it reaches the customer's hands. Their goal is to be more transparent with the entire supply chain procedure.

Their "Food Trust Framework", which is now being worked on in dairy companies and delivery services in Australia and New Zealand, will provide better product information to its customers.

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Four Innovation Focus Areas

each offering a unique pathway to npd through Mouth-Watering Transparency

01 Pure Taste

Always remember, we're doing this to reinforce our taste credentials.

Indonesian Research by University of Copenhagen demonstrates how knowledge of food provenance and production methods positively impacts taste ratings.

So the purity of our rearing methods; our green fields; friendly and dedicated people; love of nature and the animals, all work to make what we produce, the tastiest meat in the world.

02 Transparency an Asset

Embrace transparency and find ways to demonstrate how we are proudly leading global best practice.

Opportunity to take learnings from France and New Zealand.

Think about maximising nose-to-tail solutions. Meat boxes could be designed with cuts that are otherwise unavailable from retailers (e.g. tongue, cheek, tail); minimising food waste.

03 Fast-Track Technology

We will need to continuously improve what we do, particularly through the use of technology; how can we stay ahead of the game.

This will be particularly true for 'emerging' markets such as China where the blend of tradition and technology excites.

Create technology systems and channels that become part of the proof of our transparency imperative.

Provide well-being statistics for animals; focus on raising and monitoring happier animals and make this information accessible.

04 Power Ahead

Transparency is a journey and expectations will frequently be ahead of delivery. Unless we innovate to find new ways of powering ahead.

Setting the global pace by introducing 'Transparency Teams' who focus on setting, measuring and meeting transparency goals. This could include live streams to your farms; allowing consumers to buy shares in animals to avoid waste; sharing shipping trackers.

Three Communication Codes

Guidelines to communicating Mouth-watering Transparency effectively

01
Love

Share your passion and respect for what you do.

You love your environment and animals; you love the meat you produce and the people who enjoy it.

Key Words:

- Belief
- Enjoyment
- Nurturing

02
Sincerity

Transparency is a serious topic. It must be treated accordingly.

Respect for the animals and the process must always be conveyed.

Key Words:

- Respect
- Simplicity
- Dedication
- True

03
Closeness

You are in control of every step along the journey, from calving and grazing to slaughter and shipping.

This is your business; these are your animals; that is your produce.

Key Words:

- Expertise
- Hands-on
- Proud to share

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Researching Six Future Stories that will impact people's meat choices

Goal

We're building a picture of the future context of people's food and meat choices in order to identify future innovation opportunities.

So we wanted to quantify which aspects of this future context people are currently engaged with.

Our research goal is to get an early-stage indication of people's openness or resistance to alternative future scenarios relevant to meat eating.

Approach

UK and Ireland Quantitative online survey of 1,008 meat eating 20-50 year old adults (nationally representative within that age group).

Research stimulus included:

a. Six Future Stories bringing alive a future scenario set in an imagined Year 2030

b. 18 product propositions and current examples indicative of the future scenarios

Headlines

1. Most engaging future scenarios with broadest appeal are:

- Mouth-watering Transparency
- Healthy Indulgence
- Eclectic Discernment
- Conscious Enjoyment

2. Urban populations (esp. London) more open to emerging futures

3. Standout, high-appeal product performances include Carbon Neutral Beef and buying cuts or shares of an animal directly from farmers

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Mouth-watering Transparency: Future Story Findings

2030 FUTURE STORY

Mouth-watering Transparency

In this future, following several food scares, public demand and legislation will mean food producers will be obliged to disclose their entire production process online.

Every detail about meat production must be shared, and companies will be independently rated by consumers who will be able to buy directly from the farmers they believe in most.

When buying any kind of meat, we're now able to see how our purchase was raised, prepared and packaged. We can also order directly from the farmer and be satisfied that animals are raised in a way we're most happy with.

OPEN TO THIS FUTURE

87%

FUTURE "LIKELIHOOD"

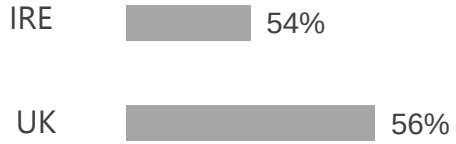
55%

APPEALING FUTURE

55%

'APPEAL' SUMMARY: vs. Adults 20-50 years 55%

REGION



MEAT FREQUENCY / WEEK

Once	2/3	4/5	Daily+
57%	49%	58%	59%

LOCATION

City	Town	Rural
54%	55%	59%

AGE

20-29	30-39	40-50
52%	61%	53%

n=334

HEADLINE & KEY POINTS

People are open to this future, it resonates strongly. Transparency is becoming a key issue for consumers.

1. Highest level of openness to Mouth-water Transparency across the six platforms. Only 13% find it unappealing.
2. While appeal higher in rural areas vs cities and towns, there is also particularly high appeal in Dublin (64%).
3. Mouth-watering Transparency resonates strongly with those who report they are trying to cut back on meat (62% appeal vs 49% among those not cutting back), and appeal even higher for those cutting back on processed meats (75%).
4. High levels of openness reflect strong opportunity within this platform. Mouth-watering Transparency resonates with people; driven by a rising demand for transparency.

Mouth-watering Transparency : Product Proposition Findings

MOUTH-WATERING TRANSPARENCY MESSAGES	EXAMPLE PRODUCT TESTED	TOPLINE APPEAL 'YUM / YUK' Ireland	UK	High Score
ANTIQUE BEEF FROM RETIRED DAIRY COWS THAT ARE KEPT ALIVE TO AGE 7		66%	67%	77% *Daily+*
NEVER-FROZEN, NO ANTIBIOTICS, NO GROWTH HORMONE BURGERS		78%	81%	88% *North (UK)*
BUY CUTS OF MEAT/ SHARES OF ANIMALS DIRECTLY FROM THE RANCHERS THAT RAISE THE CATTLE		80%	77%	86% *40-50s*

HEADLINE & KEY POINTS

Very strong product performance across the board reflects the importance of transparency.

1. In line with highest levels of openness to Mouth-watering Transparency future story, product propositions also have the strongest overall Yum/Yuk performance.
2. High yum scores for all three products among 40-50 year olds in particular.
3. Yum scores also highest among most frequent meat consumers.
4. Strong overall performance reflective of increased demand for transparency – from welfare and feed to process and production.

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Healthy Indulgence

Healthy, balanced eating that doesn't compromise pleasure

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68%
UN global urban population prediction by 2050 – up from 55% now.

Multiple studies link urban living with health issues such as obesity, respitory problems and stress

Source:
BBC
https://www.bbc.com/future/article/20190816-is-city-life-really-bad-for-you

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2. INDULGENCE

...to go all out

Current
Consumer Expectation

Hedonistic

Bigger, 'blow-out' ways to indulge

For many, as the pace of life feels quicker, physical and mental reserves feel more at risk.

67% of workers report feeling burnout at least some of the time (Gallup, 2018).

For a long time people have relied on booze filled nights, sugary treats or fattening fast food as their 'go-to' release experiences to counter the demands of a fast-paced life.

Emerging
Consumer Expectation

Healthy

Smarter healthier indulgence

But, the growth of the global health & wellness industry to $4.3 trillion (Global Wellness Institute) reflects an increasing demand for wellness products and services.

At the same time, 85% of us continue to give into cravings for indulgent foods over half of the time (L.E.K Insights, 2018).

We see a rising consumer demand for options that deliver pleasurable food & drink experiences which also benefit for our health (The Grocer, 2018).

Tomorrow's Insight-led
Opportunity Platform

Healthy Indulgence

So now, we're seeing a desire among people to balance two priorities: their wellbeing *and* the their enjoyment.

People are looking for Healthy Indulgence; healthy, balanced eating that doesn't compromise pleasure.

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Healthy Indulgence

A Future Story from 2030

In this future, as the pace of life quickens, people prioritise two things; their well being and their enjoyment.

People are drawn to foods that can deliver on both these needs. Meat, with its natural nutritional profile of protein, amino acids and iron, is also delicious and filling. That's why people put meat at the core of their diet.

Meat subscription services tailor weekly meat boxes to people's individual nutrition needs with grass-fed, feed enhanced, anti-biotic free and free-range meats that deliver low-fat protein, Omega-3s and lean protein for essential amino acids.

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Project Kaizen 2 Consumer Research 2019:
20-29 Meat Eater, Ireland

"People are looking at all the benefits of going vegan or vegetarian for loads of different reasons,

but they forget that meat does give you more energy and strength."

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Emerging Consumer Insight

People will want to feel *ready* to take on what can be a fast paced world and at the same time *rewarded* when they do.

We can satisfy this need by delivering high quality meats that are both delicious and nutritious.

Consumer Type

The demand for well-being without compromising pleasure spans across ages and generations.

While this is driven by varying generational needs, health and well-being is a priority for all age groups - from developing teens to under pressure millennials, parents and an aging population.

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Innovation Opportunity Areas



Lean & Clean

People want to live lean and also eat lean. The Ketogenic diet is on the rise and the Paleo diet is forecast to endure. Both recommend eating lean meats.

Global Data surveys report in increase in demand for hormone-free and anti-biotics free - ‘clean meats – as well as growing importance of meats with reduced fat and salt content. This is especially prevalent in APAC countries.



360^0 Wellness

We’re seeing the emergence of a 360^0 Wellness Mindset where people seek all round body, mind and spirit wellbeing as prerequisite in their lifestyle, not as an extra.

Meat contains naturally occurring Vitamin B3 and Tyrosine Amino Acids associated with mood uplift. Meat makes us feel good.



Energy Boost

We’re facing an energy deficit in how we live our daily lives. Factors such as urban congestion, light pollution and stress levels make daily energy an even more critical need.

Meat is the natural energy boosting food. Vitamins D and B12, zinc, iron, creatine and taurine, all naturally produced in meat, deliver an array of energy, strength and immunity benefits to the body.

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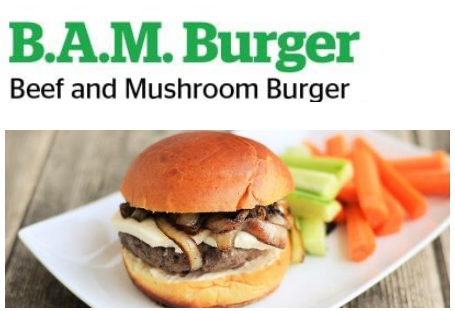
Products and Brands tapping into Healthy Indulgence



B.A.M. Burger

The B.A.M Burger by Philips Gourmet Foods. It is a 60/40% ground beef and mushroom blend with a touch of spices.

In a taste test with more than 100 participants at a major mid-western university, over 90% of participants rated the Phillips Blended Burger as "very appealing" or "appealing."

Expect to see more leading edge plant-based and herb and spice ingredients used in blended meat products.



Scratch

Research in 2019 by the AHDB in GB and YouGov indicate a 58% rising in 25-34s intention to cook more meals form scratch – driven by economic uncertainty.

Healthy Meals From Scratch is a GB brand that attractively packages plant-based and meat ingredients along with a cooking time and super-simple meal instructions.



GreatO Foods

At GreatO, 'our animals are fed well, so you eat well'.

Cattle are raised on a diet naturally rich in omega-3s which results in meat naturally high in the same healthy fatty acids.

GreatO aims to make 'every bite count', packing rich flavour, protein and added nutrients into their beef, pork, eggs and dairy products.

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Seven Innovation Focus Areas;

each offering a unique pathway to Healthy Indulgence in meat

01 Diet Drivers

Deliver cuts and create packs that focus on the needs of Ketogenic, Paleo and MIND diets.

Call out Grilled Chicken for MIND, beef, lamb, pork and poultry for Paleo and for Ketogenic, fatty cuts of steak (NY strip, ribeye, brisket), nitrate-free, unprocessed bacon, skin-on chicken thighs and legs.

On a wider basis, call out the range of diets your products support.

02 Modern Blends

As people reassess meat as part of their diet, they will seek out more meat and plant-based blended solutions.

Move beyond pea protein as a blended ingredient to reflect emerging plant based trends that are also high in protein like chickpea and Quinoa or nutrient rich like kale and mushroom.

03 Cook Healthy

How a meat is cooked can strongly influence its health giving qualities.

Create and call out cuts that are designed and appropriate for healthy cooking methods such as: Roasting, Stewing, Pressure Cooking and Sous Vide.

Cooking from scratch is also an opportunity in health. Create and package meat cuts / products that suit scratch cooking and use clear messaging to highlight the ease of preparation and health benefits of cooking fresh.

Seven Innovation Focus Areas;

each offering a unique pathway to Healthy Indulgence in meat

04 Feel Good Meat

US Research published in Nutritional Neuroscience indicates that young adult mood appears to be sensitive to build-up of brain chemicals.

Regular consumption of meat leads to build-up of two brain chemicals (serotonin and dopamine) known to promote mood.

Meat can also address deficiencies in Niacin (Vitamin B3) associated with memory loss, depression and headaches.

05 Omega 3 & Grass Fed

Grass fed beef has a global annual growth rate of over 5%, 2018-23 – significantly higher than the market.

Grass-fed beef contains much less monounsaturated fat than grain-fed beef and can deliver up to five times higher Omega 3.

Can we link intensely flavoured Grass-fed to a High Omega 3 health claim?

06 Bone Broth

Create Bone Broth npd for consumers or enable retailers and food service customers to meet demands for this fast rising meat soup / drink.

Containing Collagen and Gelatine, Bone Broth is beneficial for gut health, joints and skin. It also may support restful sleep through glycine, an amino acid that supports the Central Nervous System.

Tasty winter health!

07 Connective vs. Muscle

Create meat selections or boxes that balance muscle meat with cuts higher in connective tissue to deliver a good balance of the full range of amino acids and nutrients contained in meat.

Using the cuts high in connective tissue including offal in the diet can negate risks associated with selective meat eating. These cuts are typically high in collagen and glycine, two very rich nutrient sources.

Three Communication Codes;

Guidelines to communicating Healthy Indulgence effectively

01 Benefits

Meat delivers multiple healthy properties that help with immune system, tiredness, energy and mood.

Call out as many benefits as possible to deliver meat's overall health message.

Key Words:

- Energy
- Strength
- Protein Power
- Lean
- Clean

02 Pleasure

Set meat's health benefits in the context of the 'meaty', intense, primal taste, texture and satisfaction that meat uniquely delivers.

Key Words:

- Feel good
- Uplift
- 360^0 Wellness
- Satisfaction

03 Backed Up

Call out the nutritious properties that deliver meat's health benefits. Consistently root descriptions and claims in nutrients.

Key Words:

- Zinc
- Iron
- Collagen
- Glycine
- B Complex Vitamins: Niacin and Thiamine.
- And Protein!

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Healthy Indulgence: Future Story Findings

2030 FUTURE STORY

Healthy Indulgence

In this future, as the pace of life quickens, people prioritise two things; their well being and their enjoyment.

People are drawn to foods that can deliver on both these needs. Meat, with its natural nutritional profile of protein, amino acids and iron, is also delicious and filling. That's why people put meat at the core of their diet.

Meat subscription services tailor weekly meat boxes to people's individual nutrition needs with grass-fed, feed enhanced, anti-biotic free and free-range meats that deliver low-fat protein, Omega-3s and lean protein for essential amino acids.

OPEN TO THIS FUTURE

81%

FUTURE "LIKELIHOOD"

57%

APPEALING FUTURE

53%

'APPEAL' SUMMARY: vs. Adults 20-50 years 53%

REGION



MEAT FREQUENCY / WEEK

Once	2/3	4/5	Daily+
47%	49%	59%	55%

LOCATION

City	Town	Rural
64%	50%	38%

AGE

20-29	30-39	40-50
52%	53%	54%

n=336

HEADLINE & KEY POINTS

This future holds broad appeal, especially among frequent meat eaters and city dwellers.

1. People show a high level of openness to this future. Only 19% see it as unappealing.
2. It holds appeal and is seen as likely or already happening by a majority.
3. It resonates among frequent meat eaters as well as people in the ABC1 social grade.
4. City dwellers, especially Londoners are more likely to find this future appealing.
5. Our quant shows this future to have low levels of resistance and to be appealing and relevant to meat eaters.
6. High Potential Innovation Platform across the sector.

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Healthy Indulgence: Product Proposition Findings

HEALTHY INDULGENCE BENEFIT	EXAMPLE PRODUCT TESTED	TOPLINE APPEAL 'YUM / YUK' Ireland	UK	High Score
MEAT ENHANCED WITH OMEGA 3'S		61%	56%	68% *Dublin*
HIGH PROTEIN BURGER ENHANCED WITH VITAMIN E		60%	57%	65% *Male*
MEAT HIGH IN PROTEIN, IRON, ZINC		63%	58%	68% *Male*

HEADLINE & KEY POINTS

All health-enhanced products have performed strongly; more so in Ireland and among males.

1. Most people give all of the Healthy Indulgence products a 'thumbs up'. Strong 'yum' scores across the board.
2. Messaging around 'protein, iron and zinc' performing strongest, even when attached to a venison product.
3. Potential for these messages to perform even more strongly with more mainstream meats/cuts.

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Eclectic Discernment

Contemporary everyday food experiences that are both elevated and experimental

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53%

Of Americans consider themselves to be foodies

Source:
OnePoll USA
https://nypost.com/2019/05/28/heres-how-many-americans-consider-themselves-foodies/

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3. DISCERNMENT

...to judge quality

Current
Consumer Expectation

Elevated

An elevated everyday

‘Premiumisation’ is a mega-trend that continues to permeate every category.

The first wave of this movement brought with it the demand for higher quality, better versions of products and services that we have today.

Emerging
Consumer Expectation

Eclectic

A more stimulating everyday

As ‘discernment’ has gone mainstream, people’s demand for quality has remained, but consumers’ palates grown more sophisticated & experimental, fed by social media and streaming services.

As premium players compete, we’re going to see people gravitate towards more distinctive and potentially more daring food experiences.

Tomorrow’s Insight-led
Opportunity Platform

Eclectic Discernment

The search for products that bring people elevated yet experimental food experiences everyday.

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Eclectic Discernment

A Future Story from 2030

In this future we'll be happier to pay more for things that we know where they come from and the care, effort and quality that went into making them. We'll be trading up, not to show off but because we know what we are looking for and why.

People will become more thoughtful about where their meat came from, appreciating it being raised in a natural environment, fed a nutritious balanced diet, reared free range, and crafted with care to produce the highest quality eating experience.

We will even seek more interesting and diverse meats and cuts as these will reflect our more discerning approach to eating.

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Project Kaizen 2 Consumer Research 2019:
30-39 Meat Eater, Ireland

"I [like] diverse meats because I think we are set on what we eat.

I think people don't know there are so many other different sections of meat."

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Emerging Consumer Insight

As new cultures and new technologies open up food enjoyment possibilities, people will want to widen their horizons through distinctive, high-quality experiences.

Meat can be part of this quest for new and better.

Consumer Type

30+, more upscale lifestyles in major urban centres.

Values quality, exclusivity, and authenticity;

Tries new experiences and strives to expand perspective.

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Eclectic Discernment Opportunity Areas



New Refinement

People are seeking out new levels and new takes on quality. We're seeing people seek out more refined eating experiences through more tender meats and re-discovered meat types such as game.



New Provenance

As tastes in discernment grow and broaden, the need for clear, distinctive brands increases as consumers seek to understand and justify any premium.



New Frontiers

From harissa to gochujang to Peruvian peppers, flavours originated from diverse areas of the globe are spicing up meat jerky, snacks and burgers, as well as menus in upscale dining establishments.

Products and Brands tapping into Eclectic Discernment



Wild Game Meat

Wild and Game is a non-profit organisation that's ambition is to introduce the British public to Game meat. The harvesting of game from the British countryside goes back many centuries. It was once seen as a luxury food, now they want to bring it to fore again.



Autobiography

High end African and Asian chefs are using menus and curated meal courses to tell their life story through the food they serve patrons.

Helene An, the chef behind Los Angeles' elite seafood spot Crustacean, offers a $225, 12-course menu at her new Da Lat Rose, which, dish by dish, tells her story of coming to the U.S. from Vietnam as a refugee in the 1970s.



Carne Asada

This is Chipotle's special tender cut of steak, priced at a premium to its regular steak cuts. Launched as an LTO in September 2019, it is now being extended into 2020.

Four Innovation Focus Areas;

each offering a unique pathway to Eclectic Discernment

01
Be Tender!

Deliver more tender meat experiences for the discerning consumer.

This could be a focus on:

- Well known cuts like tenderloin
- Tenderisation benefits of the right feed (enzymes / electrolytes)
- Traditional tenderising techniques like dry-ageing, marinating or even the Chinese technique of Velveting.

02
Chase The Game

There are opportunities in Game meats.

High end restaurants in London report a surge among millennial patrons interested in game meat.

Furthermore, Waitrose has seen record sales of game and has capitalised on its newfound popularity among young, urban consumers by expanding its range to include ready meals and familiar cuts.

And within traditional cuts look to hybrid innovation. More restaurants are blending cuts to deliver optimum texture, flavour and moisture in the meat they grind.

Popular hybrids include Chuck and Spare Ribs or Chuck and Hangar Steak. Dry Age blending is also trending.

03
Frontier Flavours

Emerging and rising cuisines present opportunities.

Cuisines on the rise in US restaurants include Central European cuisine (Hungarian; Polish; Austrian).

Asian foods, especially Japanese, Vietnamese and Korean are trending on Uber Eats orders. For example, incorporate the bone marrow into the cut, to deliver an intense flavour and new experience.

West African cuisine and Filipino Barbecue are also attracting attention.

04
Story-ful Branding

Discernment relies on interesting stories and background and the brands that promise and sustain that reputation.

There is opportunity to build the brand story and reputation of breeds synonymous with Ireland, for example, Angus, Dexter, Kerry, White Park.

There may also be opportunity to brand particular regions; either through new brands (in the way Failte Ireland has done for tourism) or through use of EU Protected Geographical Indication areas.

Three Communication Codes;

Guidelines to communicating Eclectic Discernment effectively

01
Distinct Origin

Origin and story play an important role in communicating a premium brand or product positioning.

It's important to hero strong, authentic provenance cues.

Key Words:

- Origin
- Story
- Authenticity

02
Authentic Artistry

Show the thought and artistry that went into the animal husbandry.

Highlight the nutrients that were used in the feed on the package.

Explain the complex flavour profile that was carefully developed and is unique to your meat.

Key Words:

- Care
- Attention
- Detail

03
Eclectic Edge

Sophisticated, interesting flavours and pairings add intrigue to meat products and experiences.

Explore the flavours that delight consumers by complementing the meat.

Key Words:

- Elevated
- Distinctive
- Interesting

Eclectic Discernment: Future Story Findings

2030 FUTURE STORY

Eclectic Discernment

In this future, we'll be happier to pay more for things when we know about the care, effort and quality that went into producing them.

People will be increasingly thoughtful about where their meat came from, appreciating, for example, when it has been raised in a natural environment, fed a nutritious balanced diet, reared free range or crafted with care to produce the highest quality eating experience.

Meat brands like Future Craft will offer meat from animals raised on specialty diets such as botanicals, with each cut delivering a distinctive and enhanced sensory experience.

OPEN TO THIS FUTURE

81%

FUTURE "LIKELIHOOD"

54%

APPEALING FUTURE

49%

'APPEAL' SUMMARY: vs. Adults 20-50 years 49%

REGION

IRE	49%
UK	49%

MEAT FREQUENCY / WEEK

Once	2/3	4/5	Daily+
34%	49%	53%	49%

LOCATION

City	Town	Rural
52%	47%	46%

AGE

20-29	30-39	40-50
48%	49%	49%

n=338

HEADLINE & KEY POINTS

People broadly open to this future especially those living in larger households or in cities or following a special diet.

1. People are open to this future. Only 1 in 5 find it unappealing.
2. Those living in larger households (4+ people) and those following a special diet are more likely to find Eclectic Discernment appealing.
3. City dwellers, especially Londoners (small sample), are also more likely to find this future appealing.
4. Overall high levels of openness to this future with strong opportunity across the sector from this platform.

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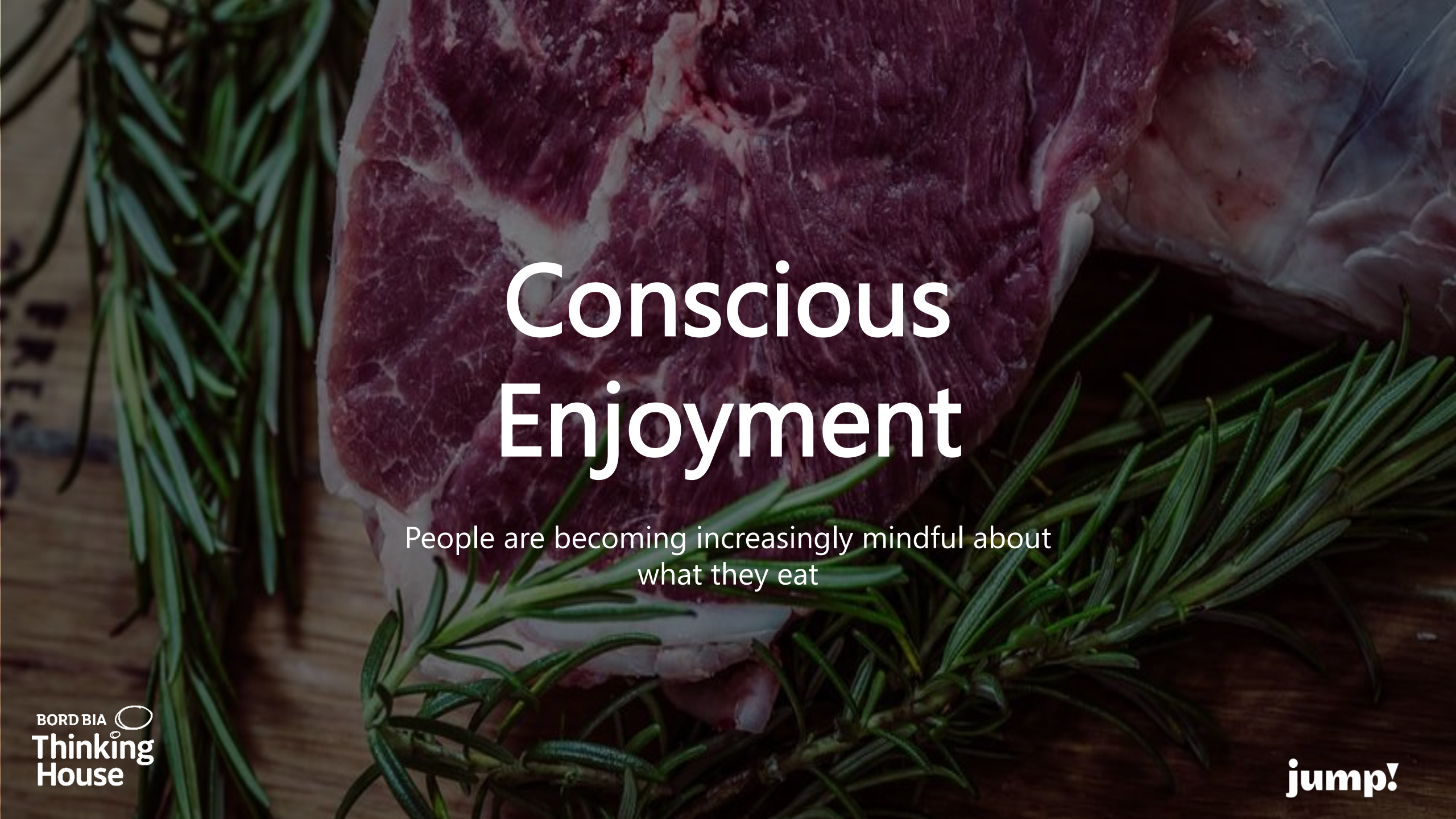
Eclectic Discernment: Product Proposition Findings

ECLECTIC DISCERNMENT PRODUCTS	EXAMPLE PRODUCT TESTED	TOPLINE APPEAL 'YUM / YUK' Ireland	UK	High Score (Total)
WAGYU TO GO!		26%	38%	42% *High protein diet*
PREMIUM WILD BOAR STEAK DIRECTLY PICKED FROM HUNTING AREAS		49%	59%	63% *Males*
BEEF AND LAMB RAISED ON NUTRIENT RICH, WINE BASED DIETS		57%	62%	66% *Daily meat eaters*

HEADLINE & KEY POINTS

In Eclectic Discernment the product with the most interesting story is creating the strongest appeal.

1. Less of a gut-reaction appeal to these products vs the overall openness of the future story itself.
2. High potential opportunities in this platform likely to be based on discerning meats (e.g. wild boar) and diets (e.g. animals fed on wine based diet).
3. The background of the product – think selection, story – is a large part of the appeal here. Lacking this may account, in part, for why the Wagyu To Go! didn't resonate as strongly with people.



Conscious Enjoyment

People are becoming increasingly mindful about what they eat

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Animal welfare is a key driver of lowering meat consumption across European countries

74%

The percentage of consumers that feel meat should be sourced from animals that are well looked after

Source:
Mintel 2015

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4. ENJOYMENT

...pleasurable experiences

Current Consumer Expectation

Carefree

Caring about me over we

Mass and mindless consumerisation has, for the most part, been able to flourish without much consequence.

People were simply unaware of the social and environmental impacts of their shopping habits.

But as awareness has spread about the damaging impacts industries have had, a new attitude towards consumption has started to emerge.

Emerging Consumer Expectation

Conscious

Alive to environmental and social impact

In August 2019 the UN's Intergovernmental Panel on Climate Change report called for a substantial reduction in meat consumption in rich countries and called out cattle raised on pastures clearing woodland as particularly emission-intensive[1].

In this context of climate urgency and mass activism, people's consumption choices will increasingly signal where they stand in society's 'Climate War'.

Tomorrow's Insight-led Opportunity Platform

Conscious Enjoyment

Conscious enjoyment is about engaging in the economy with more awareness of how your consumption impacts society at large.

The innovation opportunity for meat is to create products that offer clear ways for people to enjoy meat while also demonstrating respect for prevailing climate, biodiversity and animal welfare concerns.

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Conscious Enjoyment

A Future Story from 2030

In this future, people will want to actively manage their carbon impact and ensure they are eating only from sustainable sources.

People will seek out foods produced using natural farming methods including Regenerative Farming, a natural, low impact agriculture system that increases biodiversity on the farm and captures carbon from the atmosphere into the soil.

New Meat brands like ReGEN, that use regenerative farming, will offer meats of all types that show a carbon rating score for the farms that supply their meat.

Project Kaizen 2 Consumer Research 2019:
30-39 Meat Eater, Ireland

"You can't get away from the fact that cows and farming is killing the environment...

We don't eat meat every single day, you might not eat meat seven days a week, it's now okay to have one day of not eating meat. Whereas before it was always meat and two veg."

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Emerging Consumer Insight

People want to feel they are part of a meaningful, collective change that is setting the world on a path to sustainability.

We can satisfy this need by delivering guilt-free choices that are acceptable and desirable in a society focused on conscious enjoyment.

Consumer Type

The coming 'Climate War' will impact everyone's consumption and choices.

All life stages, from children through to older consumers will be influenced by sustainability choices.

jump!

Conscious Enjoyment Opportunity Areas



Eat Natural

Bord Bia's 2019 international study on clean labelling perceptions identified '100% Natural' as by far the most influential claim for food and drink purchase.

Whole Foods predict regenerative agriculture will be one of the top food trends in 2020.

Consumers are showing greater desire for products they know are produced with nature.



Eat Considered

People are reassessing how they can continue enjoying the protein and taste benefits of meat while still responding to environmental concerns.

Meat reduction and new meat formats are emerging as solutions to help meat eaters respond to the prevailing climate culture.



Eat Kind

60% of US consumers agree they are more concerned about animal welfare as it relates to their food supply than they were a few years ago.

Also driven by Vegan and Extinction Rebellion messages, Animal Welfare will grow as a purchase driver for meat.

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Products and Brands tapping into Conscious Enjoyment



The New Food Collective

The New Food Collective, owned by US company Applegate, create a range of pork products through regenerative agriculture: a natural farming system that increases biodiversity and captures carbon in the soil.

Products are developed through a community of farmers that are committed to sustainability, building healthy soil and improving water retention and biodiversity on the land.



Cleaver Meats

Australian beef producer Cleaver's Organic are able to track and manage their carbon emissions by calculating the carbon footprint that is accumulated for everything between farming and final delivery.

They offset these emissions by purchasing 'carbon credits' from third party organisations. By doing so, they have been able to produce a 'Carbon Neutral' beef products.



Nose to Tail

Nose to Tail provides people with a selection of meat cuts across beef, chicken, pork and buffalo; all of which are raised regeneratively, providing a high degree of consideration for the well-being of the animal.

Consumers can build their own meat boxes featuring a variety of cuts, which are delivered direct to door, helping people manage their meat consumption.

Five Innovation Focus Areas;

each offering a unique pathway to Conscious Enjoyment of meat

01
Real Regeneration

Focus innovation to create meat products that are sold under the provision of regenerative agriculture practices.

Create a premium brand which champions local farmers and their intimacy to nature alongside their sustainability efforts.

Develop meat products that are seasoned with wild flavours, adding a superior taste, naturally.

Use smart labelling on regenerative meat products, teaching consumers about the positive impact of regeneratively produced meat.

02
Carbon Competitive

Carbon is becoming an increasingly important metric that consumers will demand more and more.

Move toward carbon neutral products – think about how emissions can be offset.

Establish meaningful donations or partnerships focused on the environment and deforestation. What about a ‘one tree planted for 100 grams sold’ initiative?

Carbon Collective – a network of producers committed to delivering carbon neutral meat.

C-Team Controllers – carbon teams within the business who focus on meeting carbon targets.

03
Portion Control

Think about accommodating the increasing single person household and dining. Design smaller trays and portions.

Create need-based subscription services which can be purchased as a way of managing weekly or monthly meat consumption and can be personalised to household size.

This is also about enabling people to really enjoy high quality meat as they make an effort to reduce.

Five Innovation Focus Areas;

each offering a unique pathway to Conscious Enjoyment of meat

04
Pack Heroes

Plastic waste is a fast growing consumer concern and environmental focus. Increase use of sustainable material in packaging. Explore potential of bio-degradable plastic, bamboo, compostable boxes.

Work towards a circular economy: deliver meat (to businesses or direct to consumers) in boxes/packages which are collected and reused for future deliveries.

Give people another good reason to choose your meat with conscientious packaging.

05
Animal Smart

Demonstrate how technology is being applied (e.g., cameras, sensors) to enhance the life quality of animals.

Potentially, create direct links to farms for consumers.

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Three Communication Codes;

Guidelines to communicating Conscious Enjoyment effectively

01
Collective Care

Enable people to feel like they're creating a better future.

Focus on communicating how the brand is part of society's collective movement seeking to establish a better food system.

Highlight the continuous collaboration of the brand with producers and farmers to improve all parts of supply chain.

Key Words:

- Community
- Collaboration
- Improvement

02
Eco Engage

People want to make value driven choices, connecting with brands helping them to do so.

Create digestible information for consumers to understand the key sustainability initiatives being implemented.

Advertise the measures that are in place and the targets being set regarding carbon emissions and sustainability.

Key Words:

- Responsible
- Carbon impact
- Sustainable

03
Future Smart

Make consumers aware that the brand is forward thinking with a constant flow of innovative thinking.

Show how the brand uses science and technology to create practical solutions that help develop lasting sustainable measures.

Make visible the technology that is being used to improve the welfare of livestock and thus, the quality of meat.

Key Words:

- Technology
- Science
- Resource efficient

BORD BIA Thinking House

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Conscious Enjoyment: Future Story Findings

2030 FUTURE STORY

Conscious Enjoyment

In this future people will want to actively manage their carbon impact and ensure they are eating only from sustainable sources.

People will seek out foods produced using Regenerative Farming; a natural, low impact farming system that increases biodiversity on the farm and captures carbon in soil.

New Meat brands like REGEN that use regenerative farming will offer meat that shows a carbon rating number for the farms that supply their meat.

OPEN TO THIS FUTURE

80%

FUTURE "LIKELIHOOD"

55%

APPEALING FUTURE

47%

'APPEAL' SUMMARY: vs. Adults 20-50 years 47%

REGION



MEAT FREQUENCY / WEEK

ONCE	2/3	4/5	4/5
43%	46%	51%	45%

LOCATION

City	Town	Rural
50%	43%	47%

AGE

20-29	30-39	40-50
45%	51%	43%

n=334

HEADLINE & KEY POINTS

Strong openness to this future across segments with slightly higher levels of appeal among ABC1's and those in urban areas.

1. People show high levels of openness to Conscious Enjoyment. Only 1 in 5 find it unappealing.
2. In Ireland, the future performs particularly well in Munster and in the UK it resonates most with those living in the North and in London (small sample).
3. It also appeals slightly more to ABC1's (50%).
4. High universal appeal reflects strong potential within Conscious Enjoyment.

Conscious Enjoyment: Product Proposition Findings

CONSCIOUS ENJOYMENT PRODUCTS	EXAMPLE PRODUCT TESTED	TOPLINE APPEAL 'YUM / YUK' Ireland	UK	High Score
SAUSAGES FROM PASTURE BASED REGENERATIVE FARMING PRACTICES		49%	52%	64% *South (UK)*
BURGER BLENDED WITH MUSHROOMS, CELERY, KALE		58%	52%	67% *Dublin*
CARBON NEUTRAL MEAT		80%	77%	83% *Rural Area*

HEADLINE & KEY POINTS

Carbon neutral meat is a clear winner across all products in all future stories.

1. Varying appeal across products in Conscious Enjoyment; strong performance driven by carbon messaging.
2. Carbon Neutral messaging strongly resonates with people, and this product was the strongest performer across all Yum/Yuk testing.
3. Carbon is a key factor in decision making and a metric that people will look for and start to demand, particularly in meat.



Supercharged Convenience

Ingenious ways to eat better.

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On demand delivery will dominate the future food landscape.

85% of global consumers have ordered food to be delivered to their homes, and 20% of US consumers order food for delivery at least once a week

Report WGSN:
What's Cooking: Evening Meals
(key trends 2019)

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5. CONVENIENCE

...an easier way

Current
Consumer Expectation

Compromised

Ease over everything else

Mass urbanisation and large working populations instigated the demand for time-saving solutions that could support modern lifestyles across the globe.

For the most part today, the luxury of convenience equates to forfeiting quality food experiences in favour of ease and speed.

Emerging
Consumer Expectation

Supercharged

Clever, seamless access to quality

But, aided by technology, we're now seeing new ideas such as premium delivery services, new product formats, ultra smart vending, and direct to consumer business models that are bringing people hyper convenient food experiences that don't compromise on quality, health or sustainability.

Tomorrow's Insight-led
Opportunity Platform

Super-charged Convenience

This is about people's desire for ingenious ways to eat better.

Brands and products that can help people shortcut their way to superior food and meat experiences will win tomorrow.

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Supercharged Convenience

A Future Story from 2030

In this future, people will expect unlimited access to better, faster food experiences that seamlessly fit their lives without compromising quality over convenience.

People will subscribe to AI ‘smart food’ services that are tuned in to their sustainability priorities, food tastes, and diets in order to help them source the meals and specific meats and cuts that fit how they want to live right now.

Your fridge will help you by informing your retailer that tonight, you’re out of organic chicken breasts (for your triathlon training). As you arrive home a drone drops off what you need.



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Project Kaizen 2 Consumer Research 2019:
30-39 Meat Eater, Ireland

"In the city, you are sometimes compromising health. When you go home sometimes you will make things from scratch but sometimes it's a quick fix."

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Emerging Consumer Insight

People will demand next level meat experiences at the tap of a finger.

Consumer Type

25-40 year old tech savvy, time-strapped Millennials

Foodies, meat lovers, digital natives.

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Supercharged Convenience Opportunity Areas



D2C Business Models

People are open to and looking for new food products and services that fit with their pace of life.

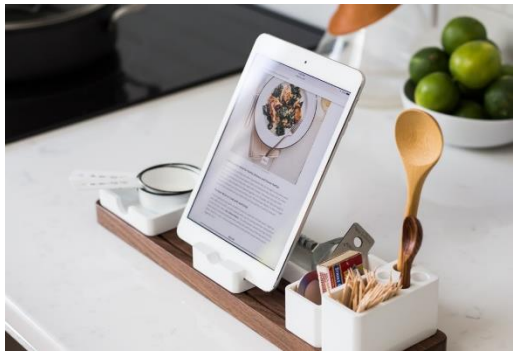
Meal kits, grocery delivery, subscription services all actively remove some of the pain points and effort that people currently face when accessing great quality food.



24/7 Digital Delivery

We’re set to see new delivery technologies become more accessible and affordable to companies across the globe.

From robots to smart vending machines, 24/7 access to the foods and drinks will become the norm.



Smarter Kitchens

Whether it is simply a pan or an entire robotic kitchen,the smart appliances market continues to grow as people turn to technology that can support their busy lives.

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Products and Brands tapping into Supercharged Convenience



ButcherBox Subscription

ButcherBox is a subscription service that puts an emphasis on its 100% grass-fed and grass-finished, pasture-raised beef.

The company highlights this beef is typically higher in antioxidants, vitamins and healthy fatty acids, and often more environmentally friendly.



Applestone's 24/7 Butcher Shop

Applestone Meat wants its 24/7 automated dispensers to become as ubiquitous as ATMs.

Joshua Applestone, founder of Applestone Meat Co., sees the future in vending machines filled with strip steaks, pork chops, and Italian sausage.

Accessibility is key to this unlikely success; customers don't have to get to the butcher shop by 7 p.m. or buy questionable leftover product from a late-night market.



Wireless Smart Meat Thermometer

Meater is a wireless smart meat thermometer. Along with the Meater app, it helps people to cook the juiciest steak, chicken, turkey, fish or other meats perfectly anytime for any occasion.

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Four Innovation Focus Areas;

each offering a unique pathway to Supercharged Convenience

01 Anytime, Anywhere

Live and breath the 24/7 culture of convenience.

This is about pushing the limits of instant gratification and bringing people excellent quality products and services on demand.

02 Agile Pay System

Payment and payment processes should feel convenient, straightforward and flexible.

Whether it's an on-going subscription or quick one-click buy, the system needs to intuitively adapt to the type of payment relationship people desire.

03 Disruptive Delivery

Harness current and emerging technology to create the next wave of delivery disruption.

This can extend to food quality such as heat systems or superior portable refrigeration innovations that can deliver foods and drinks at perfect temperatures.

04 Cooking 2.0

Supercharge scratch cooking so people can access high quality meals and meats at home with less effort and less time.

Partner with new smart kitchen appliance start-ups or innovations so that your meat brands and products fit seamlessly with the emerging world of cooking.

Communication Codes

Guidelines to communicating Super-charged Convenience effectively

01
Brilliantly Intelligent

This is about digital solutions and tech that exudes intelligence.

New apps, products and services with incredible design, user experiences and interfaces built with beauty and precision in mind.

Key Words:

- Clever
- Super-quick
- Slick
- Innovative

02
Always Easy

Simple, straightforward language and tone will help support the accessibility of this opportunity platform.

The inherent ease that underpins this platform will also help to position new meat solutions and innovations as go-to supports for contemporary lifestyles.

Key Words:

- Intuitive
- Supportive
- Easy
- Everyday

03
Naturally Intuitive

Meat brands, products and services should have the ability to smartly utilise personal data and insight to bring people on perfectly personalised food and meat journeys.

This is about brands that make intuitive recommendations that can enhance meals times and ultimately make life better.

Key Words:

- Intuitive
- Friendly
- Enhanced

Super-charged Convenience: Future Story Findings

2030 FUTURE STORY

Super-charged Convenience

In this future, people will expect unlimited access to better, faster food experiences that seamlessly fit their lives without compromising quality over convenience.

People will subscribe to AI 'smart food' services that are tuned in to their sustainability priorities, food tastes, and diets in order to help them source the meals and particular meats and cuts that fit how they live at the moment.

Your fridge will assist you by informing your retailer that tonight, you're out of organic chicken breasts (for your triathlon training). As you arrive home a drone drops off what you need.

OPEN TO THIS FUTURE

69%

FUTURE "LIKELIHOOD"

46%

APPEALING FUTURE

41%

'APPEAL' SUMMARY: vs. Adults 20-50 years 41%

REGION



MEAT FREQUENCY / WEEK

Once	2/3	4/5	Daily+
44%	41%	35%	51%

LOCATION

City	Town	Rural
46%	43%	24%

AGE

20-29	30-39	40-50
42%	47%	34%

n=338

HEADLINE & KEY POINTS

Lower levels of enthusiasm overall to this future however stronger among those in the UK, frequent meat eaters and people in their 30's.

1. There is a slightly higher level of resistance to this future overall.
2. It resonates more strongly with particular sub-groups including city-dwellers (especially Londoners), males (46%) and ABC1's (48%).
3. Those who eat meat at least once a day are most likely to find this future appealing (51%) in addition to those on a high protein diet (56%).
4. While these figures show a slight resistance overall to Super-charged Convenience, this future is appealing and relevant to specific groups.

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Super-charged Convenience: Product Proposition Findings

SUPER-CHARGED CONVENINCE PRODUCTS	EXAMPLE PRODUCT TESTED	TOPLINE APPEAL 'YUM / YUK' Ireland	UK	High Score
FINE MEATS VENDING MACHINE		27%	27%	40% *City*
QUALITY SMOKED SAUSAGE SNACK BAR		45%	49%	56% *Age 40-50 / Daily+*
WIRELESS SMART MEAT THERMOMETER WITH APP FOR COOKING ASSESSMENT		61%	53%	65% *Age 30-39*

HEADLINE & KEY POINTS

As those in their 30's start to cook more, they're looking for easy, tech solutions to get it right.

1. Some areas of convenience met with less gut-reaction appeal – low 'yum' score to vending machine may indicate lack of trust at this point and, subsequently, this kind of innovation may be further down the line.
2. However, we see uplift in performance among city-dwellers. Highlights the need to target innovations.
3. High potential opportunities for products in this platform more likely to revolve around tools and methods (e.g. thermometer) which make cooking more convenient.

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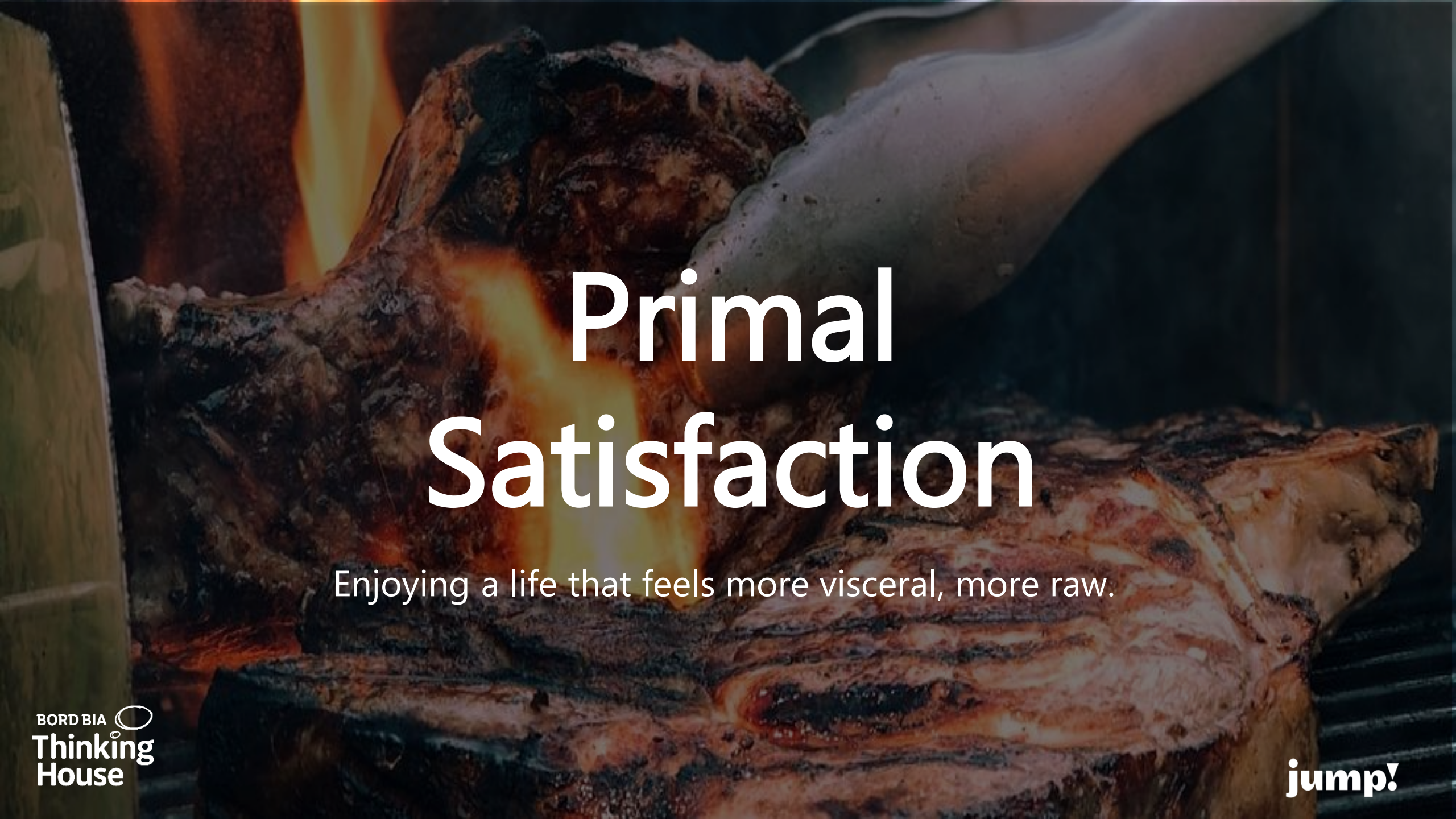
Primal
Satisfaction
Enjoying a life that feels more visceral, more raw.
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House
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6. SATISFACTION

.....a feeling of fulfilment

Current
Consumer Expectation

Essential

Back to Basics

Today 55% of the world's population lives in urban areas, that number is expected to increase to 68% by 2050.

As city populations grow, people across the globe are experiencing a growing disconnect with nature and wildlife.

This move has impacted people's relationship with food and provoked a desire for people to return to the 'old ways', deriving satisfaction more simple food experiences.

Emerging
Consumer Expectation

Primal

Full on instinctive satisfaction

The non-stop technological innovations from phones to tablets to AR and VR has further accelerated people's disconnect from nature.

This in turn, is fuelling a greater appetite for wild, raw or visceral experiences that can stir people's senses and jolt them out of their digitally dependent lifestyles.

Tomorrow's Insight-led
Opportunity Platform

Primal Satisfaction

This is about enjoying life full-on; embracing more raw and visceral food experiences especially through nature and wildness.

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Primal Satisfaction

A Future Story from 2030

In this future as technology curates even more of what we do, a counter movement will emerge where people value more raw, primal experiences; including participating in more extreme, physical sports and experiencing more wild nature and travel.

People will bring a similar mindset to their food choices, seeking out real foods that offer big satisfaction and heightened taste experiences to be savoured and shared.

So, expect meat to be purchased using on-pack measures for tenderness and taste intensity. Expect people to participate in meat clubs to experience, up close and personal, the craft of meat treating culture.

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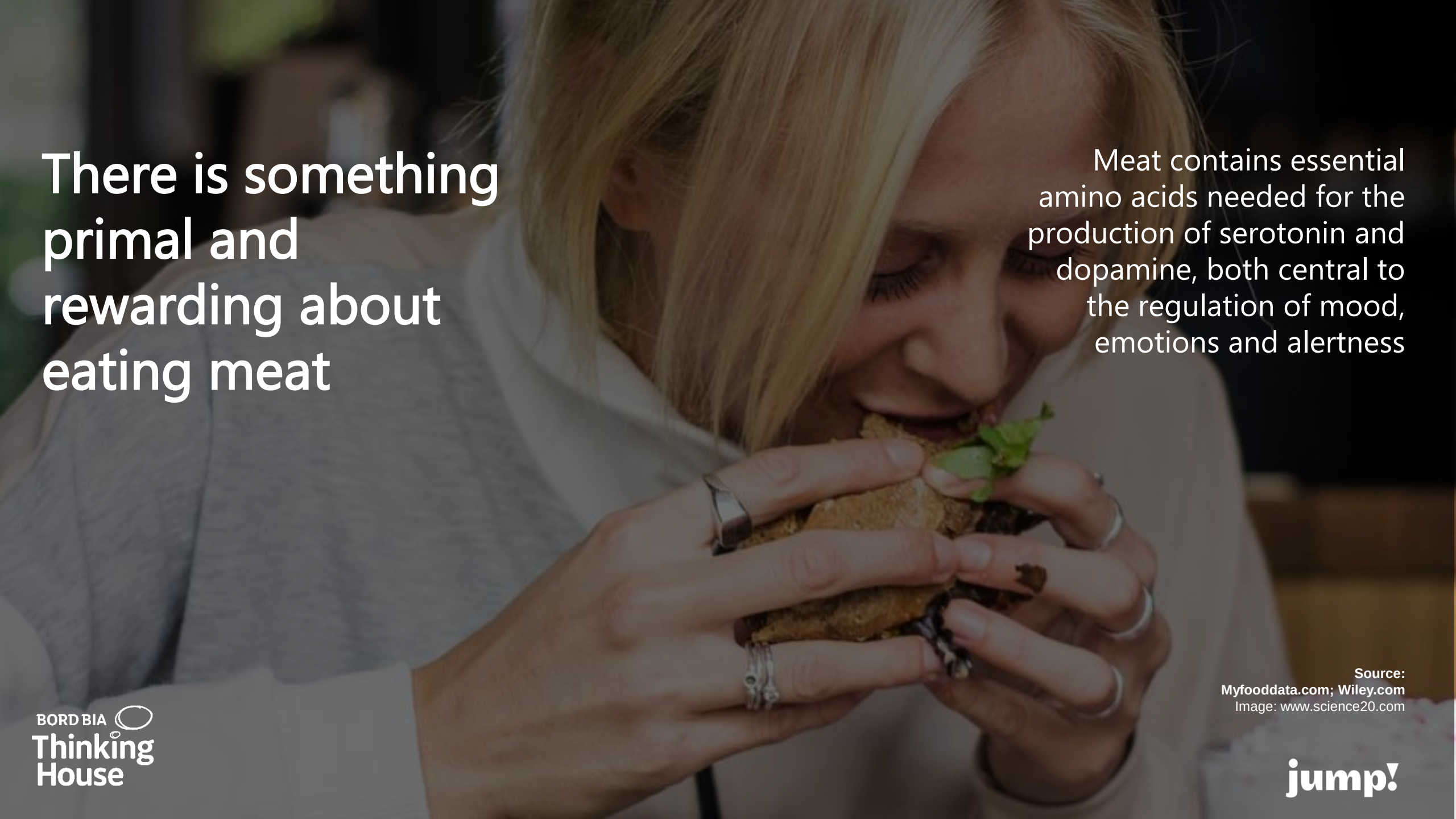

There is something primal and rewarding about eating meat

Meat contains essential amino acids needed for the production of serotonin and dopamine, both central to the regulation of mood, emotions and alertness

Source:
Myfooddata.com; Wiley.com
Image: www.science20.com

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Project Kaizen 2 Consumer Research 2019:
20-29 Meat Eater, Ireland

"I just love meat!

Quorn, or whatever the vegetarian alternative is, just doesn't taste the same. It's not the same texture and doesn't have the same gristle! "

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Emerging Consumer Insight

People will seek out a life that's more raw, more sensory, more connected to nature.

We can satisfy this need by focusing on meat's natural ability to deliver on big satisfaction, big taste and 'big sharing' occasions.

Consumer Type

Under 50s, especially those in their 30s; Conscientious adventurers.

People who are pushing back against the default of a sedentary, tech-curated existence and want to enjoy a life that's more visceral and more in sync with the natural world.

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Primal Satisfaction Innovation Opportunity Areas



Big Satisfaction

Mood and meat are linked at a cellular level; tryptophan in meat is a precursor of serotonin, the brain's "feelgood" chemical. Eating meat really can feel good.

Some studies have shown red meat intake to help combat symptoms of depression.



Big Taste

The Maillard reaction in food science is what gives gilled and cooked meat it's depth of flavour and distinctive taste.

Restaurants such as Hatchet Hall in LA cook all their meat over a live wood burning fire in order to heighten the taste of their meats and overall experience for their diners.



Big Sharing

Research by University of Udine, Italy suggests that eating in groups improves the taste perception of food.

Researchers found that facial expressions from others positively impacted food experiences. This backs up other research pointing out people who are in a state of joy undergo a positive food experience.

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Products and Brands tapping into Primal Satisfaction



Carcasse: Fine Dining and Butchery

Owned by craft butcher, Hendrik Dierendonck, this Michelin Star Belgian restaurant that celebrates nose to tail enjoyment of all meat cuts.

Patrons are also invited to participate and learn in butchery workshops onsite



Food Hall Eating

According to real estate brokers Cushman & Wakefield (fastcasual.com), food halls are headed for more rapid growth, popping up in new markets as well as multiplying in cities where they already exist.

The Huff Post in New York also reports communal dining and sharing as a significant trend on he NYC dining scene.

This is reflected in the growth of Food Hall dining experiences and Izakaya Japanese tapas style of dining.



'Butcher Chefs'

Goodman restaurants in London age six tonnes of beef on site at any given time, and its butcher-chefs cut each quality steak on request.

The result of their efforts is clear from first bite, with charcoal ovens adding sumptuous smoke to each mouthful.

Four Innovation Focus Areas;

each offering a unique pathway to Primal Satisfaction

01 Customised Butchery

People will develop more close knit relationships with their butchers and will become more invested in the animals, butchery processes and ultimately the meat they're choosing to eat.

We can expect more customised initiatives like James Whelan's 'beef bonds' which offers customers a share in their cattle.

Prairie Point farm offer customised butchery requests for delivery throughout the US.

02 Closer Cuts

People will go beyond the standard, expected cuts of meat to experience lesser-known cuts that deliver a more full-on flavour experience of their chosen meat.

Cuts such as Bavette, Hangar Steak and Tri-Tap are gaining attention as under-rated but highly flavoursome alternatives to Fillet or Tenderloin.

03 Made for Sharing

As demand for Food Hall and tapas style eating grows, create and pack smaller 'bite-size', shareable cuts and products.

04 Meat Clubbing

Subscription box services' stellar growth is forecast to continue (Global Newswire) across multiple categories.

There is opportunity to tailor offerings to this direct to consumer channel as well as add value through dining, butchery and animal welfare partnerships – all offering a more primal connection to meat.

Communication Codes

Guidelines to communicating Primal Satisfaction effectively

01
Fulfilling

Meat, eaten well, makes people feel good. It delivers satisfaction like no other food.

Communications can call out the real satisfaction and fulfilment to be enjoyed from meat.

Key Words:

- Feel-good food
- Fulfilling
- Real satisfaction
- Rewarding

02
Full-on

Meat's authentic texture and eating characteristics deliver a viscerally enjoyable food experience.

Call out the mouth-watering, full-on qualities that only meat delivers.

Key Words:

- Meaty texture
- Juiciness
- Mouth-watering
- Enjoyment
- Flavoursome
- Cooking Aromas

03
Communal

Show your food being shared and enjoyed by groups.

Meat's great variety of formats, flavours, stories and cultural associations makes it a food to not just be shared, but talked about while it is shared.

Key Words:

- Sharing
- Big Group
- Feast
- Inclusive
- Togetherness

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Primal Satisfaction: Future Story Findings

2030 FUTURE STORY

Primal Satisfaction

In this future, as technology curates even more of what we do, a counter movement will emerge where people value raw and primal experiences; pushing adventure to extremes; participating in more physical sports; experiencing more of wild nature.

People will bring a similar mindset to their food choices, seeking out food that offers big satisfaction and heightened taste experiences, often shared among groups.

Meat will be bought using a set of on-pack measures for tenderness and taste intensity. People will participate in meat clubs to experience the craft of meat treating culture.

OPEN TO THIS FUTURE

68%

FUTURE "LIKELIHOOD"

43%

APPEALING FUTURE

35%

'APPEAL' SUMMARY: vs. Adults 20-50 years 35%

REGION



MEAT FREQUENCY / WEEK

Once	2/3	4/5	Daily+
35%	32%	36%	36%

LOCATION

City	Town	Rural
45%	30%	22%

n=336

AGE

20-29	30-39	40-50
36%	42%	25%

HEADLINE & KEY POINTS

While there is relatively less enthusiasm for this future, opportunities exist among those in their 30s' and Londoners, especially.

1. Overall, people are somewhat less open to this future.
2. However, it appeals to certain subgroups, which points to an opportunity for more targeted products and activations.
3. It resonates among those living in cities, Londoners in particular, 50% of whom find this future appealing. Given likelihood that Londoners be early adopters this could indicate a future that is slightly farther out.
4. Primal Satisfaction also performs better amongst those following a special diet - high protein (55%) and low carb* (59%) especially.
5. While these findings reflect a slight resistance to this future, they point to opportunities among targeted sub-groups.

*small base

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Primal Satisfaction: Product Proposition Findings

PRIMAL SATISFACTION PRODUCTS	EXAMPLE PRODUCT TESTED	TOPLINE APPEAL 'YUM / YUK' Ireland	UK	High Score
CENTRE-CUT FILLET WITH A SHITAKE MUSHROOM AND PARMESAN CRUST		54%	58%	74% *Consume Duck*
ARTISAN MEAT KIT		52%	62%	64% *Munster*
MEAT-THEMED DESSERTS AND STARTERS		23%	32%	34% *Males*

HEADLINE & KEY POINTS

People are looking for a richer, more luxurious food experience; product performance varies across Primal Satisfaction.

1. Slightly lower product performance reflective of less openness, overall, to the platform.
2. These products particularly resonate with those who eat less conventional meat e.g. duck, goat, venison.
3. In relation to meat-themed deserts – the market might not be ready for this yet. Positioning for products like these may need to be built on the communal aspect, for example, to better resonate with consumers.



Four Headlines Tomorrow's Meat Innovation:

1. The cultural and food context for meat is set to radically change

2. But clear innovation opportunities exist for meat to drive demand in this new world

3. Consumers will expect holistic, smart and contemporary solutions that help them enjoy food in a changed world.

4. Standing still is not an option!

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