



How to change strategies into action

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June 26, 2019

**FORUM
FOR THE
FUTURE**

Forum for the Future

We work with leading organisations **ambitious for creating transformational change**

Over the years, we've helped pioneering businesses develop and refine the **business case** for putting sustainability at the heart of their corporate strategies.

We've helped public and third sector organisations **sharpen their purpose and maximise their impact.**

We've also helped create **new partnerships, coalitions and organisations,** all accelerating the big shift to a sustainable future.



Protein Challenge 2040

We envisage a future in which everyone in our growing population has access to healthy, sustainable and affordable sources of protein



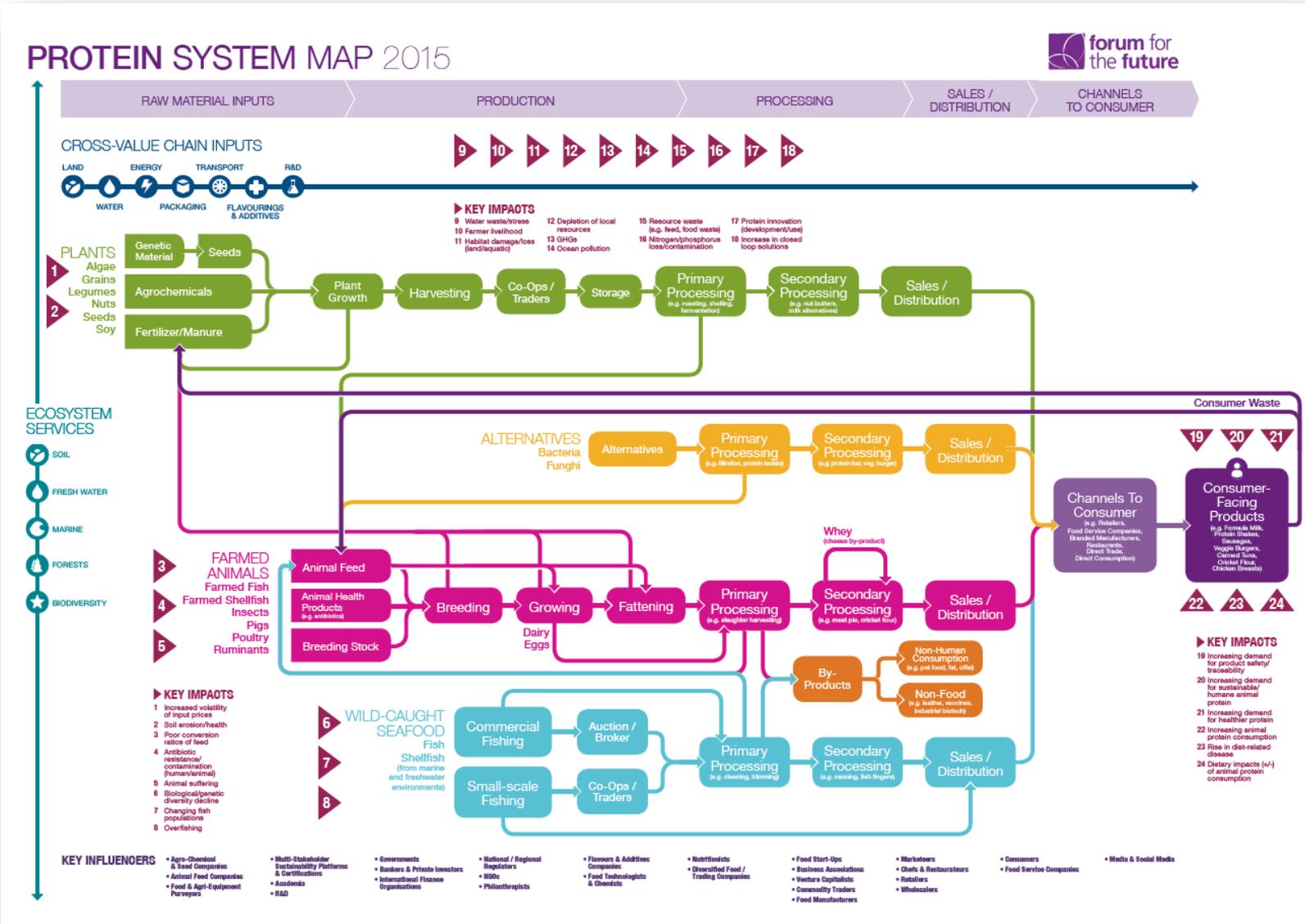
Our unique collaboration brings together business and NGOs



A pair of hands is shown from the wrists down, cupped together and holding a mound of dark, rich soil. The soil is dark brown and appears moist and crumbly. The hands are light-skinned and have some soil on them, particularly around the wrists and fingers. The background is a dark, blurred field of falling soil, creating a sense of depth and movement. A semi-transparent grey rectangular box is overlaid on the center of the image, containing white text.

**The challenge is clear –
but action is slow and
fragmented**

Challenge partners systematically identified opportunities to catalyse progress



The opportunities identified formed the basis for our two core workstreams



1 **Production:** Sustainable animal feed

We are catalysing the **scale up sustainable options for animal feed**, aiming to:

- ✓ Reduce the dependency of the global feed system on existing, unsustainable production systems, such as soya and fish meal, by helping to identify and scale up sustainable alternatives and drive new innovation.



2 **Consumption:** Rebalancing protein in diets

We are catalysing the **rebalancing of protein in human diets**, aiming to:

- ✓ Reduce the total quantities of protein consumed in Europe and the USA in line with individual country dietary guidelines; improve the **sustainability of the meat, fish and dairy** that's consumed; and increase the proportion of non-animal protein in the average diet by 50%.
- ✓ We are also scoping work to drive action in Asia to leap-frog western diets and enable more equal protein access

1

Sustainable Animal feed: Our Feed Compass collaboration aims to scale sustainable innovation



1

Production: Sustainable animal feed

Scaling up sustainable animal feed innovation to meet demand for animal protein



By 2040 we want to:

- Significantly **reduce the dependency** of the global feed system on protein sources by scaling up a range of **alternative sustainable feeds** to market.

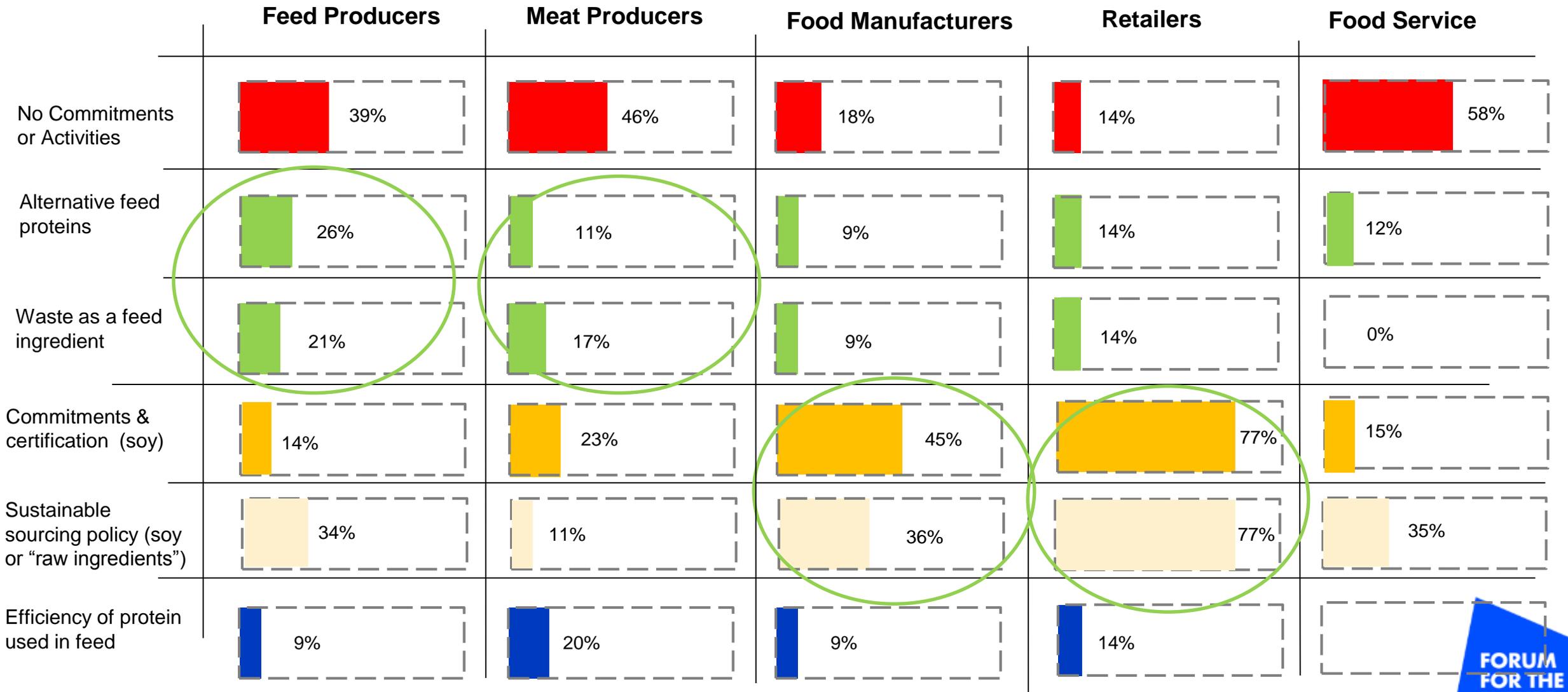


There is significant innovation happening in the sustainable animal feed market

- **Agriprotein** raises \$105 million in its latest funding round in 2018 for insect farms.
- Protix unveils **Friendly Salmon**, reducing fishmeal content of feed by replacing with insect-based proteins.
- **Bühler** is currently setting up a pilot facility with a partner in China for processing fly larvae and mealworms on an industrial scale.
- Corbion and BioMar announced that >350,000 tons of fish feed with **AlgaPrime™ DHA** has been delivered to Norwegian salmon farmers since 2016
- **Albert Heijn** selling eggs from laying hens fed live black soldier fly larvae



But this is not yet penetrating into the mainstream market



Early signals of change: Waitrose has been actively involved in trials for alternative animal feeds



Commitment: 100% of the soya used in feed for the production of own-brand meat, milk, poultry, egg and farmed fish products through certified sustainable sources

“We also work closely with our suppliers and other partners to explore alternatives to soya, so that we make sure we’re using the most sustainable animal feed we can.”

Forage Protein Project

- Recently completed the 5-year project looking at how forage proteins (e.g. clover, chicory) could be used as alternatives to soy.
- Involved 8 farms from the Waitrose beef, lamb and dairy supply chains, together with researchers at Aberystwyth and Bangor Universities.

Optibean project

- Participated in this 4-year Innovate UK funded project exploring the use of faba beans as a potential replacement for soya in animal feed.

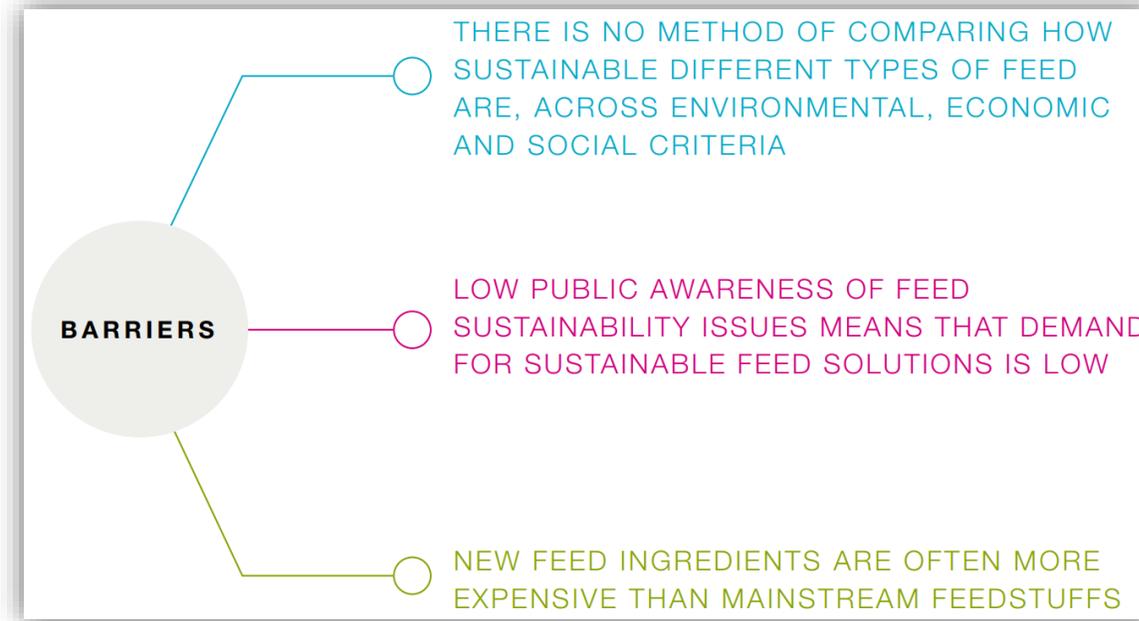
Early signals of change: Tulip, the largest pig farmer in the UK, has a series of commitments on animal feed



Commitment: Reduce the sustainability impacts of animal feed

- Encourage farmers to replace imported soya with home-grown protein sources such as peas & beans in pig diets
- Reduce reliance on imported soya in feed
- Target improved feed conversion ratios
- Explore ways of using more food waste in pig feed.

We have identified three key barriers to scaling sustainable feed alternatives



Feed Compass Framework



Feed Compass Framework: Qualities of Sustainable Animal Feed



Recognising the lack of methods to assess and compare different feedstocks, our cross-sector working group developed Feed Compass principles. The principles are designed to provide an easy-to-communicate, top-line method of evaluating feed sustainability and guiding decision making:



Restorative land use and biodiversity practices



Minimises greenhouse gas emissions



Takes a 'circular' approach



Minimises pollution



Minimises fish stock depletion



Supports human rights and welfare



Minimises freshwater consumption



Promotes animal health and nutrition



Financially viable

Our priorities



Piloting Feed Compass

Real-life case studies showcase the sustainability measurement of feeds to support better decision making



Market incentives*

Create food industry feed commitments to build momentum for market transformation



Global convening*

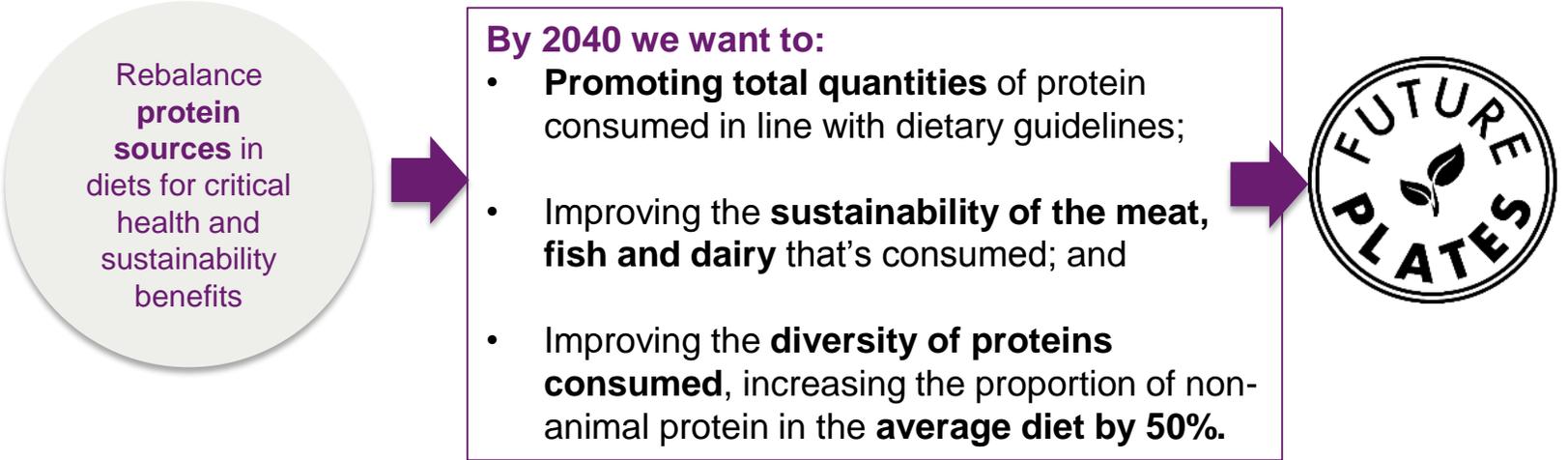
Grow the global platform for sustainable feed. Reach new audiences and regions: education, awareness, tools and guidance



2 Protein in diets: our Future Plates collaboration aims to rebalance protein in diets

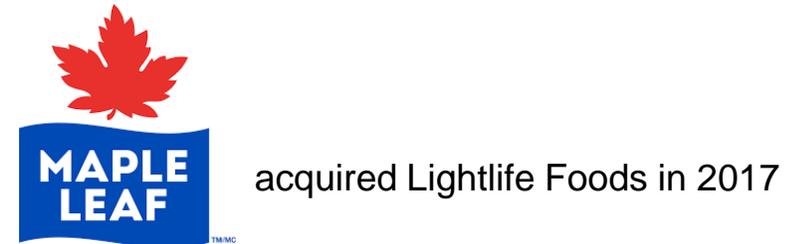
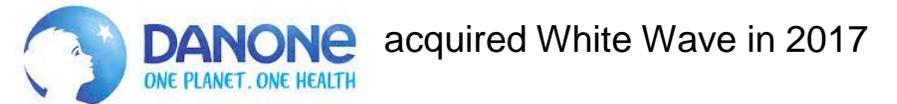
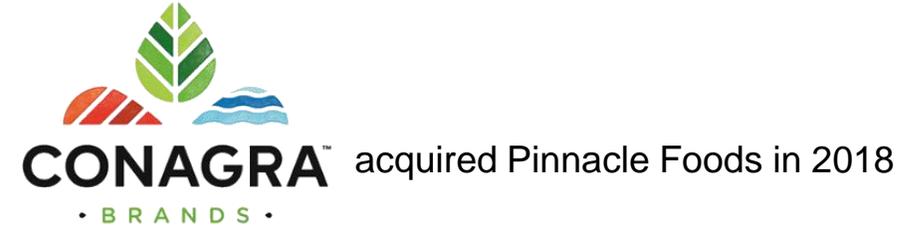


2 Consumption: Rebalancing protein in diets



Food manufacturers are driving innovation on protein via acquisition & investment

	Meat Producers	Food Manufacturers
No Commitments or Activities	92%	50%
Activities towards diversification	10%	50%
Investment	5%	41%
Current range extension	5%	9%



Protein diversification is happening fast but few retailers or food service companies are making commitments or actively promoting plant-based food



announced intention to launch the Impossible Whopper across USA



announced intention to create a meat-lookalike meatball



EST. 1884

successfully launched Plant Kitchen range

Early signals of change: BaxterStorey is actively working to deliver less animal protein and more plant protein

BAXTERSTOREY: FOOD EQUILIBRIUM

MISSION STATEMENT

Our vision is to create a food culture that is focussed on using less animal protein and more plant protein. Our intention is to change people's perception on meat and fish; to not over-rely on it as a source of protein and to instead make grains and vegetables the stars of the plate.

We will make this possible by building a communication network where chefs can share ideas, inspiration and tips on how to produce great tasting, plant-based and reduced meat dishes.

We believe this is far more than just another concept or trend, sustainable diets will become a way of life. Food EQ is a step towards making this happen, creating change that will ultimately contribute to improve not only the health of the people we feed but also the health of our planet.

baxterstorey
we **love** this business

Early signals of change: Veggie Pret is normalising plant-based eating



Pret opened its first dedicated Veggie outlet 2016 © Pret A Manger

Pret A Manger to buy rival Eat in Veggie push

UK sandwich chain to convert many of the 94 premises as it taps into vegan and vegetarian demand

Key enablers we have identified to-date for creating a new protein norm



(A) SKILLS

(B) LANGUAGE & MESSAGING

(C) DEMAND SIGNAL

(D) CHANGE INCENTIVES

(A) SKILLS

- ❑ Upskilling consumers on how to cook tasty plant protein
- ❑ Training of chefs and developers



Protein Challenge: Chefs training pilot

There are more than 325,000 chefs in the UK alone, and millions more across Europe. Yet they often **lack the knowledge and skills to deliver meals with a better balance of protein.**

We are piloting ways to better equip chefs to create rebalanced dishes and products as they move into the workplace or continue their careers. This will help meet rising industry demand for these skills, and drive innovation.





(B) LANGUAGE & MESSAGING

- Social media & high profile support for the movement
- Simple messaging for consumers but also internally for buyers
- Develop consistency in terminology across businesses
- Addressing hostile messaging emerging from livestock industry
- Clear translation of behavioural science for industry



(C) DEMAND SIGNAL

- Investor demand for transparency
- Global brand challenge
- Demonstrate demand from leading food service customers, e.g. professional workplaces & public procurement, to say they want this shift

(D) CHANGE INCENTIVES

- Transparency around true cost of food
- Shift in promotion and relative cost of sustainable foods
- Smooth Novel Foods Regulations
- Just-transition pathway for livestock producers



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