

Plant-Forward

The Earth Day 2022 Now that We are Dining Out
Again Update





April 22, 2022 is the 53rd celebration of Earth Day. It is also the 12th anniversary of Plant-Forward dining.

In the months leading up to Earth Day 2009, Changing Tastes' founder Arlin Wasserman created the Plant-Forward culinary strategy as the focus of an Earth Day culinary competition at the James Beard House that challenged chefs to cook for "A Better Tomorrow" and was sponsored by Sodexo.

Challenging chefs to create new recipes while following a simple instruction to keep meat, fish, and poultry on the plate and on the menu, but to shift the proportions of ingredients to include a larger diversity and share of plants along with

humanely and sustainably raised proteins was the goal.

In creating Plant-Forward the intention was to focus the creativity of the culinary community on reimagining the role of protein on the plate.

With the introduction of the Plant-Forward culinary strategy, recipe and menu design became our profession's most effective tool for helping the planet,

This is also how culinary professionals and the foodservice industry can make our most significant contribution to sustainability. It's the choices we make about what proteins to eat, and how much, that have the biggest impact on our environment compared to any other ingredients we choose or how we operate, equip, light,

and furnish our kitchens and dining rooms. Protein choices are also what diners think about most often when they order and are key to our business success.

For decades before the launch of Plant-Forward, sustainability and doing our part to help the environment were largely focused on sourcing locally and better produced ingredients, recycling packaging, and composting, or donating the leftovers. Protein was more of an afterthought, while a host of nutrition efforts focused on eating more whole grains, fruits, and vegetables, as well as eliminating refined carbs and trans-fats.

That has all since changed for the better.



Cooking is the Solution

Since 2009, more and more culinary professionals have used the Plant-Forward strategy to change recipes, menus, and approaches. Food industry leadership has reshaped what many Americans choose to eat.

The results have been profound: changes in the American diet — especially eating smaller portions of meat — have achieved 15% of the overall reduction in our nation's carbon footprint that the Biden administration pledged to achieve by 2020 at this year's United Nation's Climate Change Conference in Glasgow.

That's a remarkable achievement for simply doing our jobs as culinary professionals, developing new recipes and serving up delicious meals to the dining public.

It's also been a quicker and cheaper approach to tackling one of the world's most important problems compared to the hundreds of billions of dollars or more it will take to improve energy and transportation systems. By comparison, the Plant-Forward approach means bringing a new focus to the time we already spend working in the kitchen developing new recipes along with the cost of printing new menus, which we also probably would have done. The work of the culinary profession may even reduce health care costs as we serve up healthier meals that include slightly less meat.

With a bit more time to go, the culinary profession can help the U.S. achieve 1/5th of U.S. climate goals by 2030.

Diners Want More Plant-Forward

The dining public is ready and following the lead of the culinary profession.

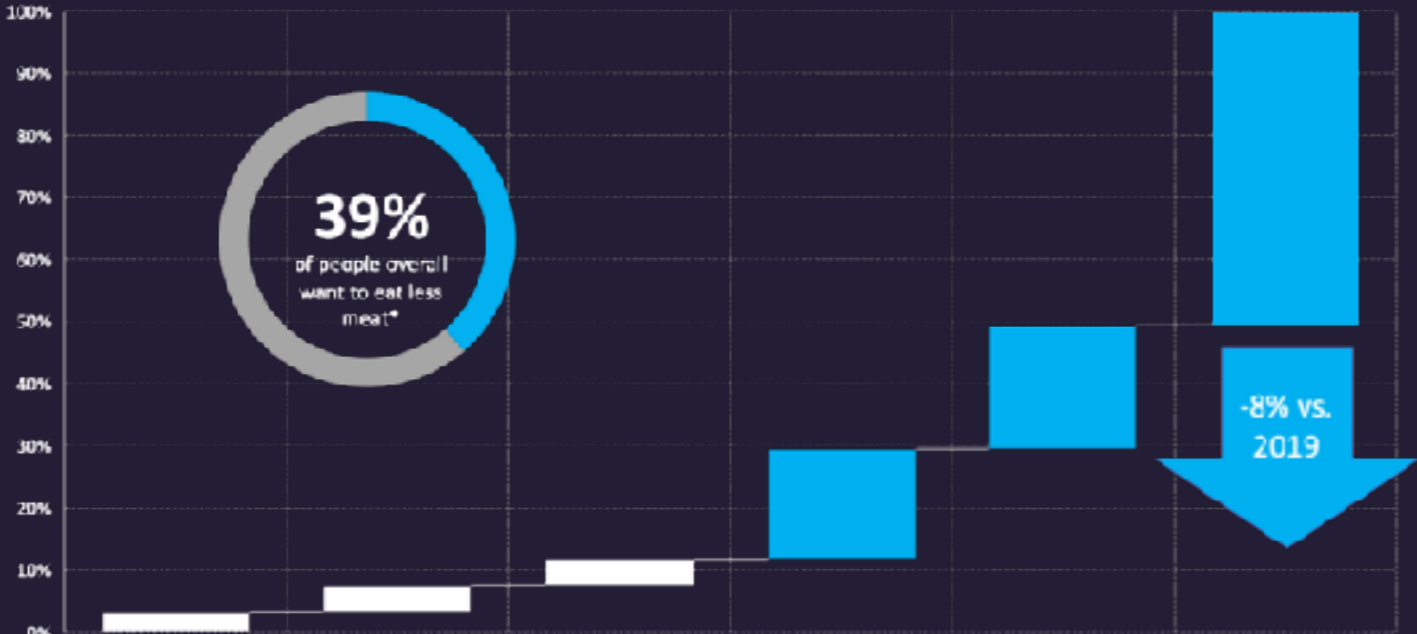
Changing Tastes has been studying consumer attitudes about protein choices for a decade, looking at what people are eating now and how they will want to eat tomorrow. As we've said for the past several years, America is now amid a once in a generation reconsideration of our protein choices and thoughts about where meat belongs on the plate.

In a nation often thought of as "meat and potatoes," half of American adults no longer

consider themselves regular meat eaters. While the number of vegetarians and vegans hasn't changed, a growing share of American adults want to eat a bit less meat in the next year or two, our research found.

Over the past seven years, the share of Americans who are vegan or vegetarian has remained stable and small. Now, and for several years, about a third of American adults looked to reduce the amount of red meat they eat. Then, during the past year, one out of every 11 American adults joined that group, the biggest year-over-year change we've seen.

How do Americans Eat Today?



*Excluding vegans and vegetarians

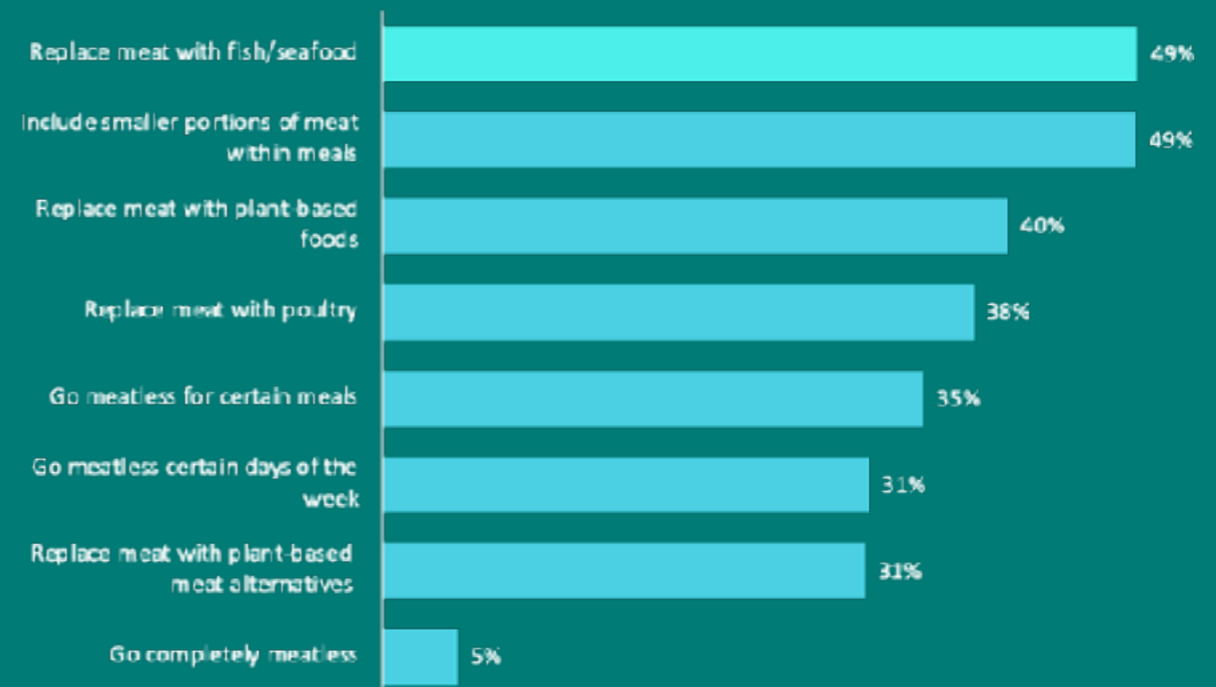




There are a lot of reasons for this, from Covid-19 driving us to take more control of our own health, to the full emergence of Millennials— now larger than the Baby Boomer generation — along with Gen Zers, who are more inclined to make food choices that both help the planet and improve animal welfare.

Now, their top choice for doing so is to eat meals with slightly smaller portions of meat, and that’s what Plant-Forward has helped the restaurant foodservice industry serve up for a decade.

Most Appealing Way to Eat Less Meat





Cooking, Not Manufacturing

Over the past few years, the seeds of confusion in the foodservice industry around “plant-based” and consumer appetites have grown into thorny vines. There has been increasing interest among consumers for meals that contain smaller portions of meat and larger portions of plants, fruits and vegetables, legumes, and grains.

Before Covid-19, consumers spent a growing share of their food dollars on meals cooked by culinary professionals to either eat in restaurants or at home. Even during the pandemic, a surprisingly large share of Americans continued to stand in lines for take-out or use delivery services to avoid having to cook themselves.

So, it’s not surprising that the marketing efforts for manufactured meat replacements tried to link their products to a real consumer trend. Within the foodservice industry, manufactured meat replacements made from plants have been heavily promoted as the solution for diners who wanted to eat less meat.

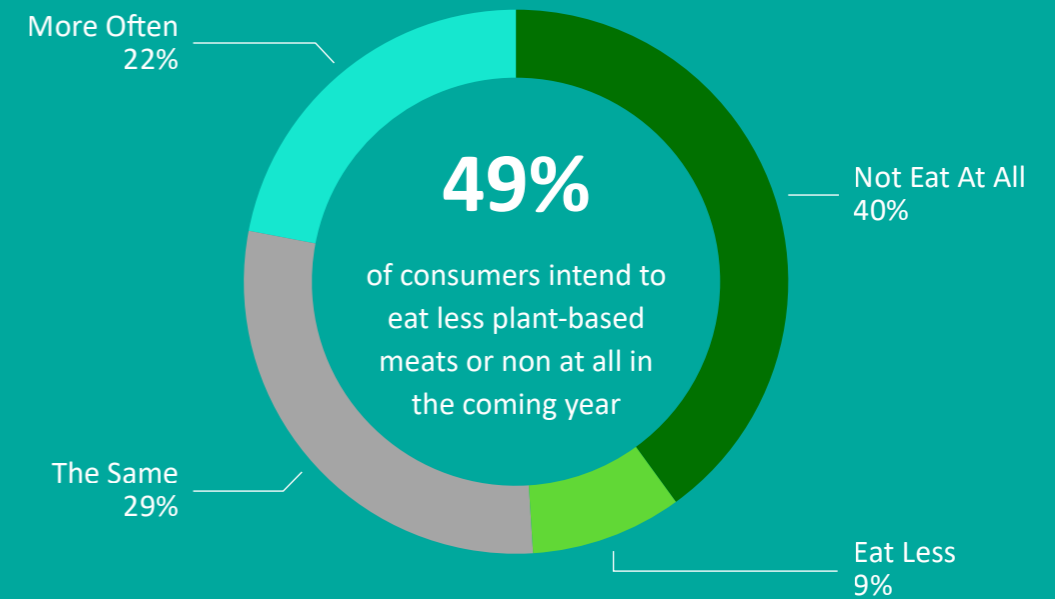
But that's not the same as consumers wanting to eat meals without any meat or being interested in eating manufactured meat replacements made from highly processed ingredients derived from plants (think: protein isolates or soybean root extracts) especially when they dine out.

Until a couple of years ago, many diners were interested in meat replacements. That was when you were more likely to read headlines about the next generation of manufactured meat alternatives that tasted, smelled, and bled like a hamburger than you were to find them on a restaurant menu or in a grocery store.

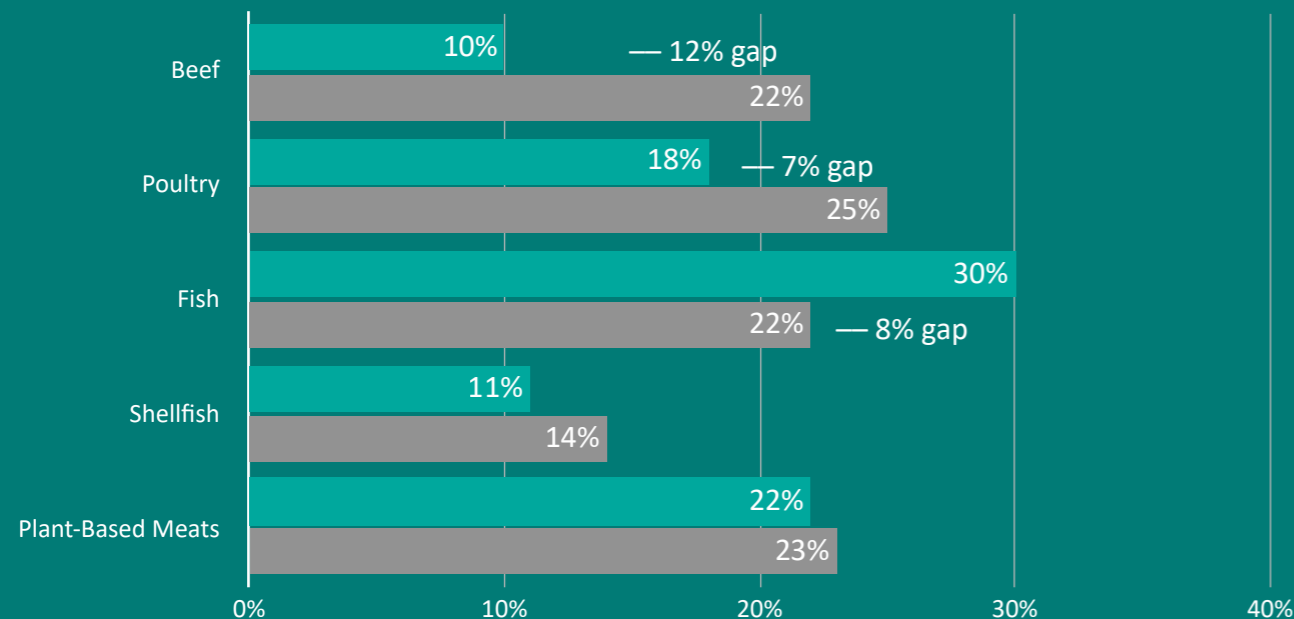
During the pandemic, these products had their audition at America's kitchen tables. The shift to cooking at home day after day

and the prospect of eating meat replacements as frequently as we'd eat a real burger (which is more than twice a week, according to the USDA), made some of the shortcomings of Next Gen plant-based meats clear: They are not real meat and what is in them.

As much as our industry has led on Plant-Forward eating, we've also spent the past decade responding to the dramatic change in consumer expectations around clean ingredients, being served mostly whole and minimally processed foods, and avoiding highly processed and synthetic ingredients not commonly found in well-stocked commercial kitchens and grocery stores.



Consumers and Operators want to Eat and Menu more...



With that, it's not surprising that while the share of Americans looking to eat less meat has grown over the past year, their interest in eating manufactured meat alternatives has declined substantially.

Menus need to catch up with our changing tastes. Consumers now want more fish and seafood but, as of now, menus are headed in a different directions as operators plan to add more poultry, plant-based meats and beef to the menu. Now, 4:10 Americans no longer want to eat them and about 1:10 want to eat less of them, a swift change of fate for what was previously one of

the most popular choices for replacing meat. Sales are declining for brands like Beyond Meat, Field Roast, and others along with underwhelming results in a host of recent launches with national restaurant brands.

This past year, consumers have also made it clear that they are looking to eat more fish and seafood as well as plant-based foods like fruits and vegetables, grains, legumes, and a host of other ingredients that are cooked either in their homes or in our kitchens. And as they always have, they are asking culinary professionals to cook for them using real food, not processed ingredients.

Victory Gardens and Menus

No look at the current situation in foodservice can avoid touching on the Russian invasion of Ukraine, a nation whose flag depicts a field of wheat under a blue sky. The nation is one of the world's most important growers and suppliers of wheat, corn, and edible oils. Russia, too, is a major producer of grains, low priced fish, and synthetic fertilizer. The war has ended food exports from Ukraine and, along with economic sanctions, Russia as well.

Coming after Covid19 made supply chains less predictable, food inflation and shortages are now a daily concern. The shortage of grains on the global market, as well as reduced supplies of fertilizers also mean that the cost of animal feed will go up for some time to come.

The last time the world was at war, Americans were encouraged to plant Victory Gardens and grow their own fruits and vegetables. As this war and the global response seem likely

to increase the cost of livestock products, Plant-Forward recipes and menus that somewhat reduce the amounts of meat, poultry, and other animal products needed can be the basis for a "Victory Menu." This will help us manage food costs until the conflict ends and Ukrainian farmers can put down their guns and return to their fields.



Earth Day Take-Aways and Celebrations

When we celebrate Earth Day in our kitchens and dining halls, we need to acknowledge how much we have already done to help the planet and to help the U.S. achieve its climate commitments. Simply by doing our job, we've produced a meaningful change and achieved more than most other industries. We also need to look forward and continue to do our jobs, make progress, and serve great food.

The best news is that diners are back, and they want us to keep cooking for them. As we do that, here's what matters:

- More diners want to eat a little less meat, continuing a trend that began several years back and was unaffected by Covid19. It's important to note- that's not the same as wanting to eat no meat.
- After nearly two years of home cooking, diners want us to cook real food for them and not just serve the same manufactured products they can buy in the grocery store.
- Plant-Forward culinary techniques have helped us offer smaller servings and use more humanely and sustainably raised meat and poultry.

Winning in the post-Covid19 market is a simple equation: smaller portions of meat that are more sustainably raised, menued, and served more often alongside a diversity of plant-based ingredients. This covers all the bases for diners who are more eager to eat out than ever before.



Changing Tastes, a values-driven consultancy that provides strategy, sustainability, and culinary consulting to Fortune 500 and growth stage companies, foodservice and hospitality businesses, investors governments, and the philanthropic sector.

Learn more at www.changingtastes.net