

Plant-Forward:

The April 2021 “Let’s celebrate Earth Day (again) and get our COVID19 vaccinations!” finally!

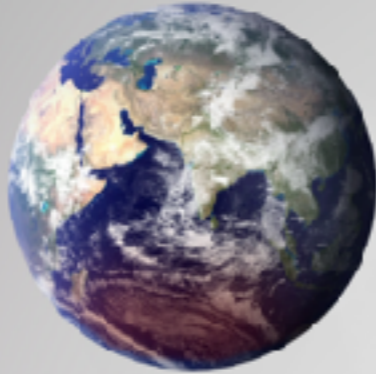


April 2021 marks the 51st time we will celebrate Earth Day. It also marks the 12th anniversary of Plant-Forward dining. For those of us working in the culinary profession and the food service hospitality industry, and with sustainability woven into every aspect of our work from what we select and cook, to what we throw away, it's hard to remember a time before either of these.

But it was more than a decade ago, back in 2009, that Changing Tastes' founder Arlin Wasserman created the Plant-Forward culinary strategy to be the focus for an Earth Day themed Better Tomorrow culinary competition at the James Beard House, sponsored by Sodexo.

Plant-Forward is a simple instruction and approach 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. His goal in creating Plant-Forward was to focus the creativity of the culinary community on reimagining the role of protein on the plate.

This is 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 back in 2009, protein was an afterthought, while a host of nutrition efforts focused on eating more whole grains and produce and eliminating refined carbs and trans-fats.

Now all that has changed.

Over more than a decade, beginning with just one culinary competition, Plant-Forward dining has harnessed the creativity of America's culinary profession to drive sustainability in significant and delicious ways.

April 2021 also marks a much more recent and equally welcome change across the United States and especially in the restaurant industry. That is the widespread availability of vaccinations to end the COVID19 pandemic and a return to both gathering together and eating together.

Throughout the pandemic, Americans have shown an unwavering commitment to not cook for themselves and to continue to buy meals cooked by culinary professionals, and then incredibly pent-up demand to return to dining out.

Very soon we will again be asked to cook more meals for more people and make more of the choices about what they eat.





In anticipation for a brighter future, Changing Tastes conducted new research during the Covid19 epidemic into what Americans want to eat, particularly protein choices.

This continues our series of studies we've conducted for nearly a decade. This time, we capture not only what the dining public wants to eat over the coming year, but also what the culinary profession thinks they should be served.

We also tap into how a year of cooking for ourselves at home and eating with the same familiar faces around our dining tables and in our pods has changed our tastes.

We hope this briefing provides you with some ideas to not only satisfying, serving, and delighting your diners as they return, but also some keys to winning a larger “belly share” of the American diet and increasing the number of meals you serve every day.

With COVID19 now receding, we all want to get people to have culinary professionals cook an even larger share of their meals.

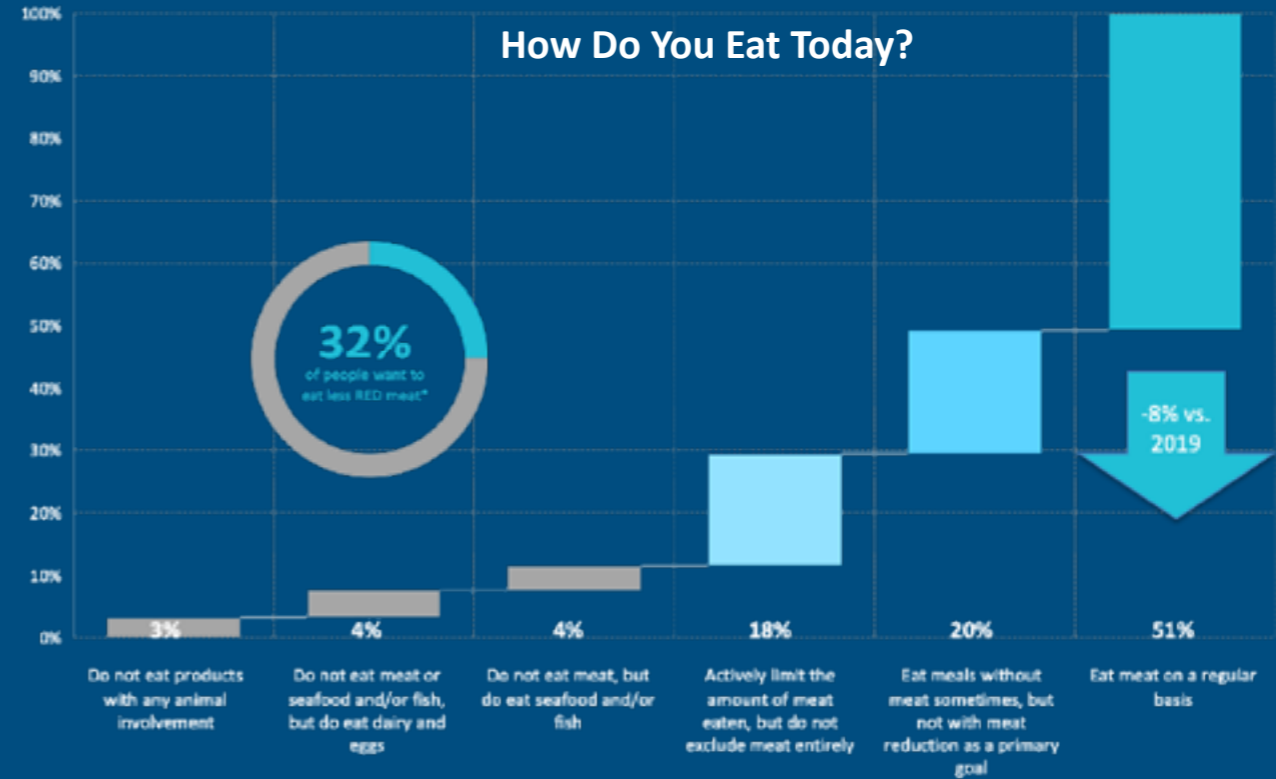
Here's what we found.

Tastes are changing...especially for proteins.

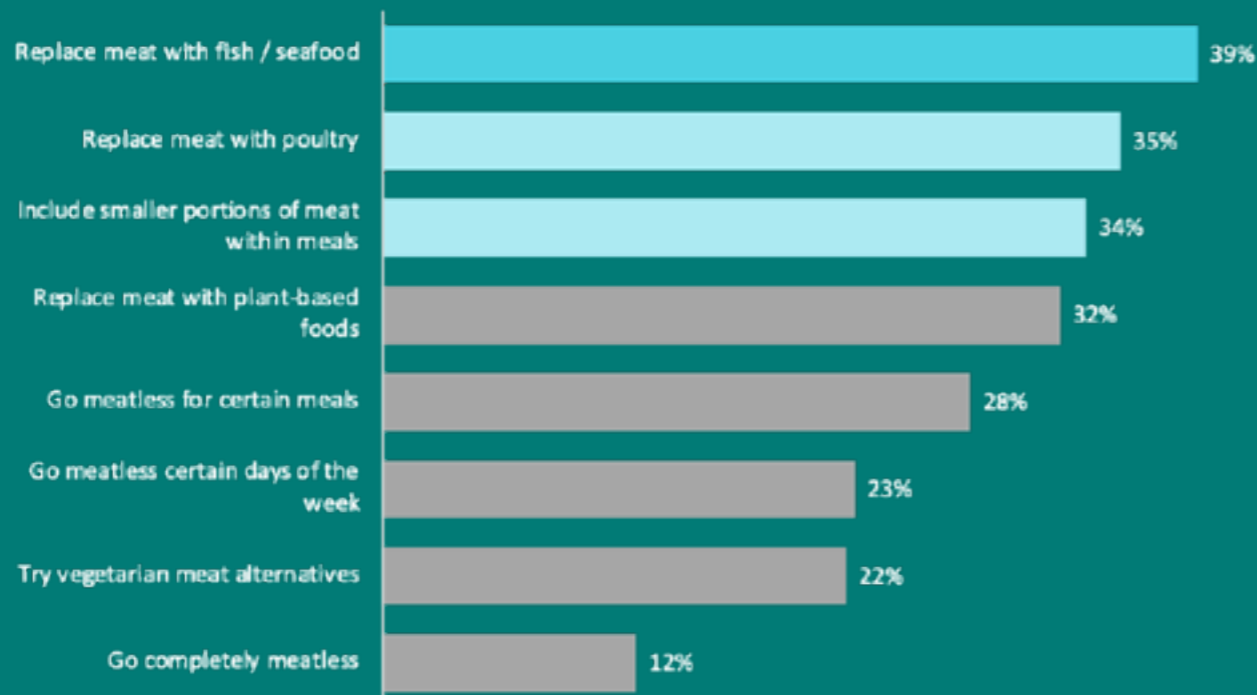
During the year of Covid19, the share of American adults who still want to eat meat regularly while eating a bit less of it grew substantially.

Nearly one out of three American adults are now actively trying to limit the amount of meat they eat, while only 51% of American adults want to continue to eat meat on a regular basis. Americans remain firmly committed to continuing to regularly eating meat, while the number of vegans and vegetarians remains both steady and small.

This continues a trend that we first saw about four years ago, and COVID19 did not change that.



Most Appealing Way to Eat Less Meat



What is relatively new is that our interests and appetites are now turning to the sea, and away from plant-based meat alternatives.

Among the 32% of American adults who want to eat less meat, their number one choice for doing so remains replacing meat with fish and seafood.

For the second year in a row, eating fish and seafood is a more appealing choice displacing eating smaller portions of meat at a meal or eating poultry instead.

All of these also are now more popular choices than avoiding meat or using plant-based alternatives. And, it's been that way for the past two years, since the current generation of meat alternatives became widely available.



May I Take Your Order?

Diner preferences are pretty clear.

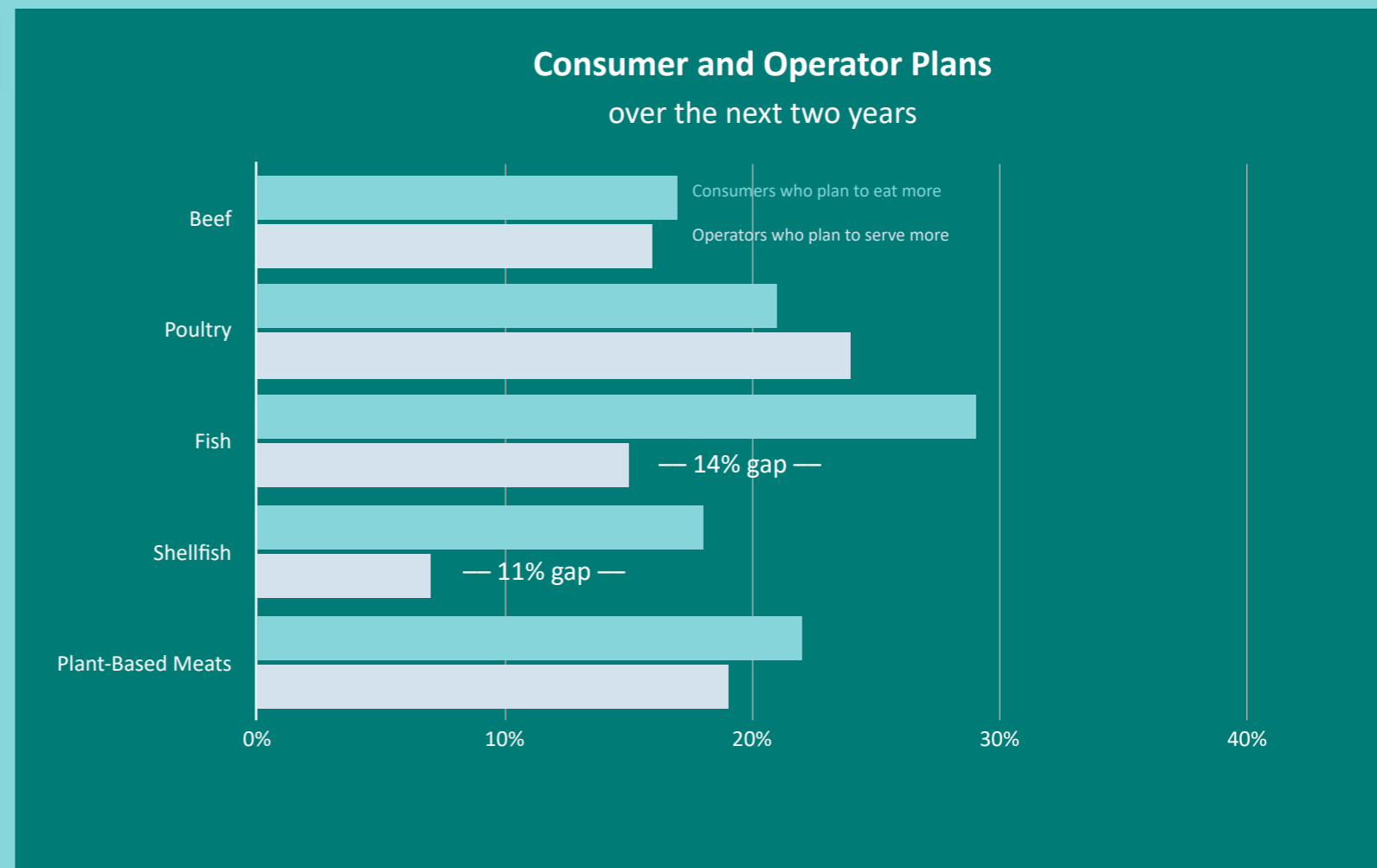
But with restaurants closed, it's been tricky for those in the foodservice industry to stay in touch with the dining public that has been stuck at home. It shows.

While 29% of adults say they want to eat fish more often and 18% want to eat shellfish more often, far fewer operators plan to increase their purchases of these items.

Over half of operators expect to sell less fish and seafood or to have sales remain unchanged. While about half of adults intend to reduce or avoid meat in some way, more operators plan to increase beef and chicken purchases than any other move. This would be a mistake.

Despite the interest in plant-based meat alternatives in prior years, consumers have a much less interest in them now that they are in the market.

About half of all consumers either don't eat plant-based meats or intend to reduce their consumption. About one of out eleven people who eat them now plan to eat less in the near future.

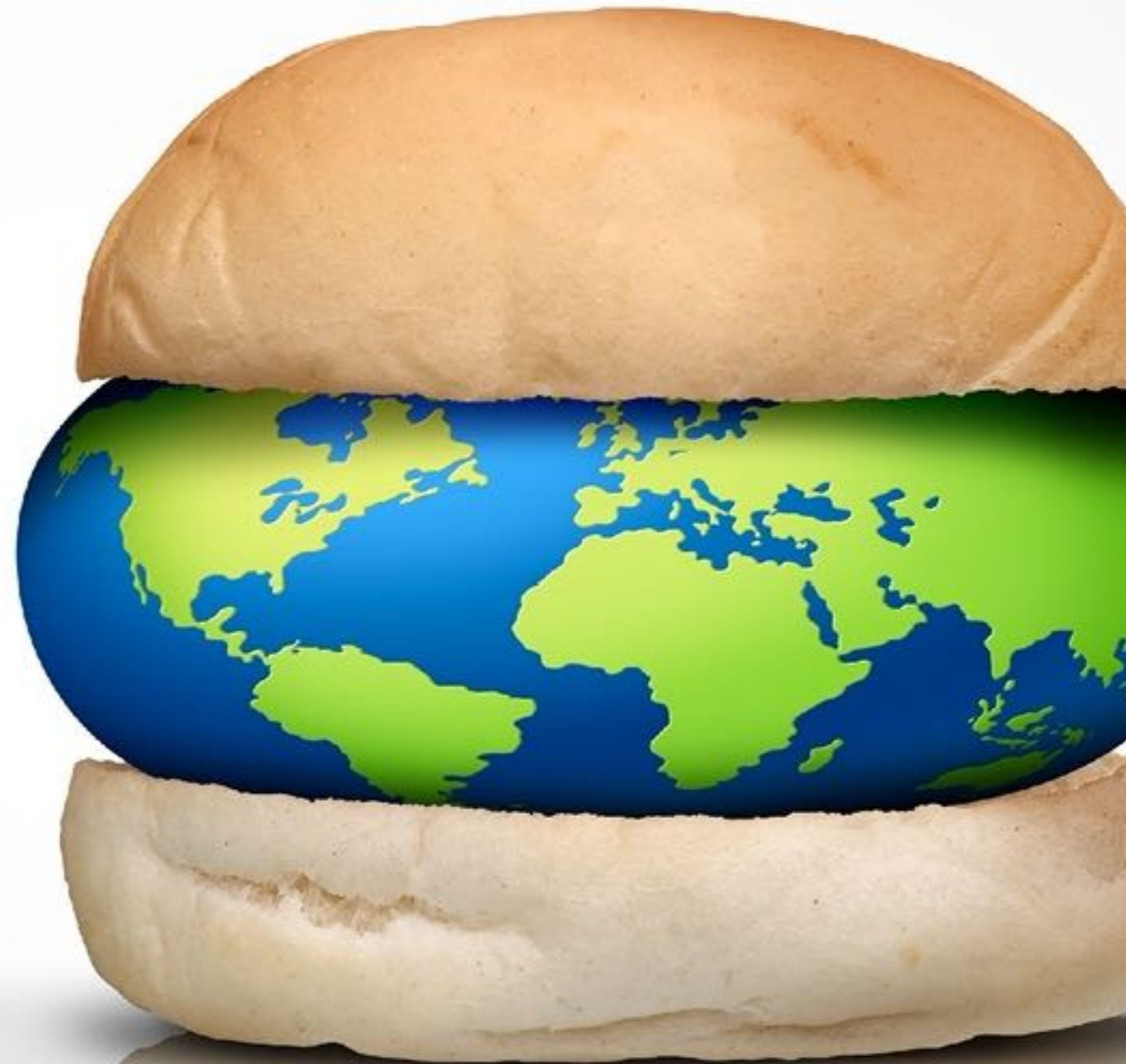


That's a much greater negative view and intent than for fish and protein-rich plant based foods like peas, beans and nuts, or almost any other high protein food.

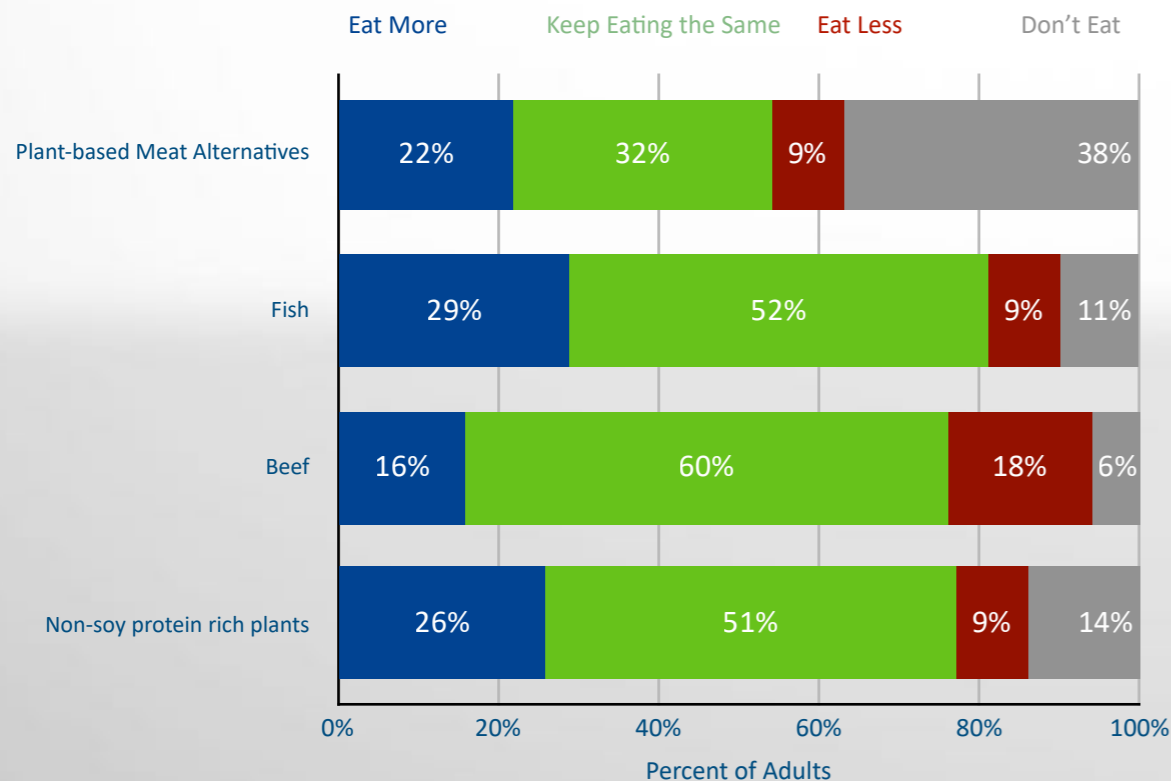
Again, the big move is to eat less beef and more fish and plant-based foods.

It's no surprise that the eager interest in trying them didn't translate into a frequent consumption. The new generation of "fully designed" meat replacements have lots of features including textures, bleeding, and a host of attributes that make them come very close to the real thing, including specific "locked down" and vivid flavor profiles that approximate the perfect burger, chicken tender, sausage, or shrimp.

However, we've seen even before the past year of cooking at home that many people quickly grow tired of eating the same engineered flavor profile over and over again in comparison to the way real meat, poultry, fish, and seafood take on a myriad of varying flavors from seasonings, marinades, smoke, and fire. That became apparent with the substantial increase in the volumes of real meat, poultry, fish, and seafood sold in grocery stores during the COVID19 lock-down compared to plant-based alternatives. And this came despite the many disruptions, shortages, and health scares in the meat packing industry.



How I Plan to Eat Over the Next Year or Two



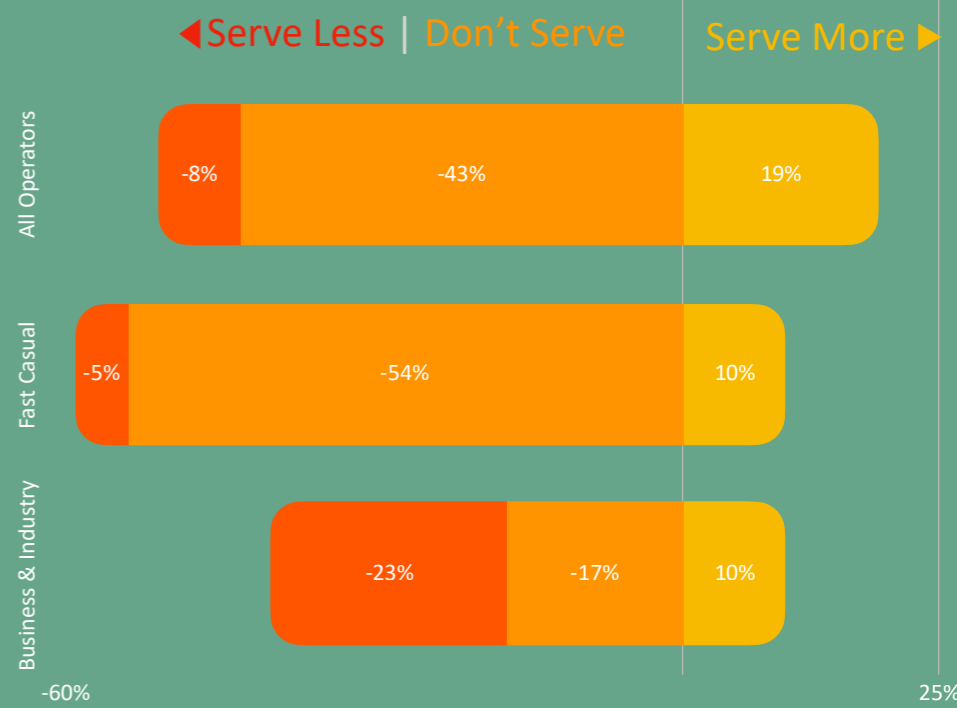


That is not to say the headlines about the rising rate of sales of plant-based meats isn't accurate. It's a good story to tell investors and also the result of relatively low sales rates, also known as tricks with small dominators. ("Hey, sales of our new paleo rainbow sprinkled cauliflower donuts are up 300%. Yesterday we sold one, and today some guy bought three.")

Also, with the push into grocery, ordering the same branded items that we can pick up in the store may not be as attractive once we can dine out again. While consumers are still interested in plant-based meat alternatives, they are more likely to want to eat them at home. That's something we found even before COVID19.

In terms of being "close to the action," we also found that the two early adopters of plant-based meats, corporate dining and Fast Casual Operators – whose traffic held up better than other channels during COVID19 -- are making a relatively quick pivot. Fast Casual Operators are least likely to add plant-based meats than other channels while nearly a quarter of business and industry dining operators plan to serve less.

What are your plans for serving plant-based meat alternatives over the next two years?



-60%

25%

More if by sea, if only...

While a substantial share of Americans want to eat more fish and seafood and plan to do so over the next two years, during COVID19 we ate it less frequently than chicken, beef, or pork.

Why didn't people eat more fish and seafood during COVID19 like they said they wanted to?

One answer over the past year of sheltering might be mageirocophobia – the fear of cooking – or perhaps more accurately the fear of cooking badly for others. Many consumers find cooking fish to be a daunting prospect as they face seemingly higher prices and less forgiving fillets in comparison to

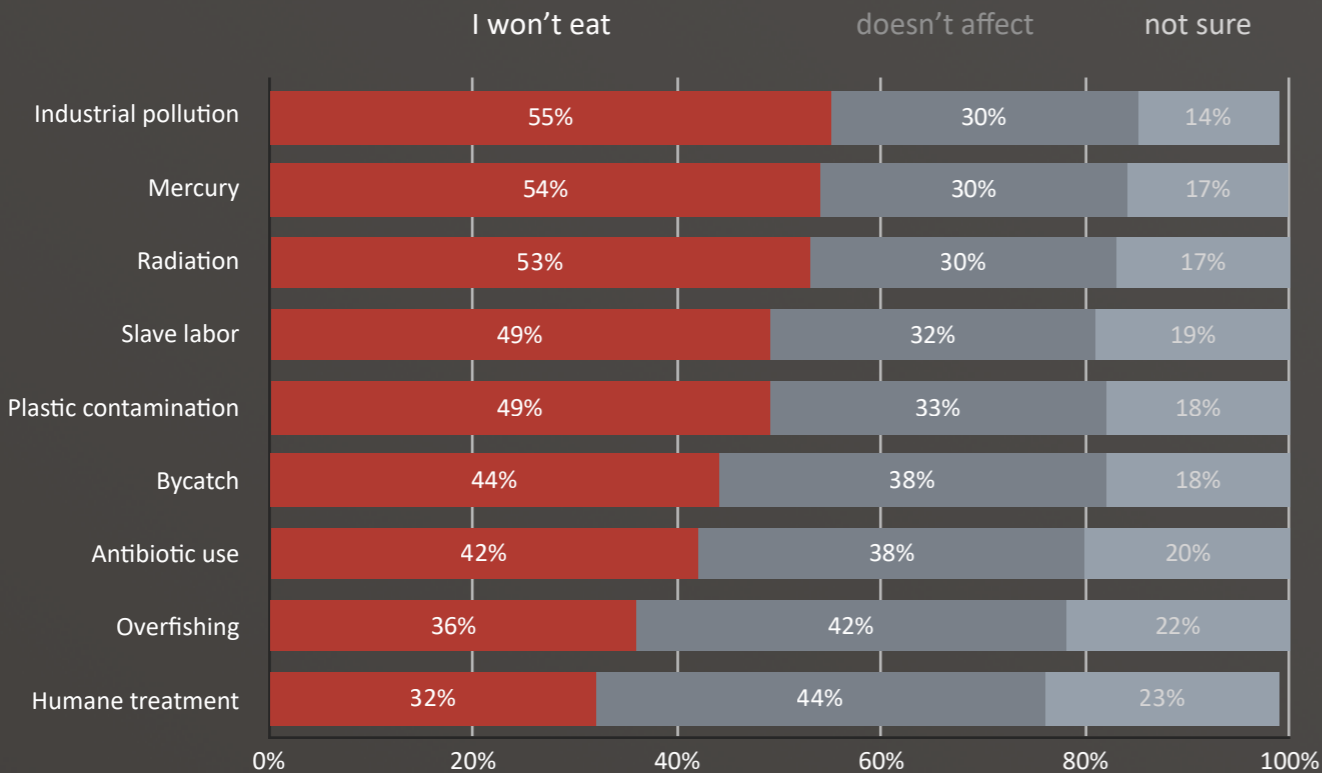
meat and poultry, along with that “fishy smell.” With the pressure to serve an endless series of meals to family members, housemates, and a handful of others in our “pods,” rates if mageirocophobia also probably increased over the past year.

We also looked deeper and found that our rising concern about the health of our oceans is giving many consumers pause. Eating fish and seafood is how we connect ocean health with our own health, and right now many of us think of the oceans as unhealthy and full of microplastic

pollution, toxic chemicals like mercury, and radiation.

About half of consumers won't eat fish and seafood because of problems with our ocean health, as well as the use of slave labor in seafood production. That's a larger share of consumers than those who are concerned with overfishing and bycatch and is not surprising. Concerns are even greater among people who are focused on healthy eating, women, and younger consumers. When sustainability issues are seen as impacting our own health, more consumers care.

Impact on Eating Decisions



The take-away is that we can create tremendous value by making informed choices about what fish and seafood to serve.

That is the same thing we found with choosing meat and poultry where diners expect us to find the best producers that raise animals humanely, avoid antibiotics, use regenerative practices, and still taste delicious.

This means being selective in choosing fish and seafood based on where and how it's raised and harvested, not just what kind it is.

Just like looking at the practices of land-based farmers, we can help consumers by making expert choices as professionals who find out and know more about the waters our fish and seafood comes from, how the environment and the workers are treated, and maybe even look for more fish harvested in the U.S.

We know the best raised meat and poultry costs more than lower quality options. The same is true for fish and seafood, which often costs more per pound than meat or poultry.

The Plant-Forward culinary strategy that helped us reduce portion size, buy better meat and poultry, and keep serving costs the same can now also help us make the switch to a bit less meat and more fish and seafood.



Take-Aways, Served Up Fresh

So much awaits us after April, from the return of diners amid a receding pandemic to the opportunity to welcome and serve people eager to again eat what we cook perhaps more often than ever.

During the last few months and dark days of the COVID19 lockdown, fewer restaurants were open and fewer people went out to eat. While we knew what this meant for our business, it was hard to figure out the impact of endless home cooking on how diners want to eat and what we should put on the menu.

Now we know more, and here's what matters:

- More diners want to eat a little less meat, continuing a trend that began several years back and unaffected by COVID19.
- Plant-Forward culinary techniques have helped us offer smaller servings and also use more humanely and sustainably raised meat and poultry.
- After a year of home cooking, diners may not come back for more plant-based meats, at least not the same kind they can buy in the grocery store.
- Instead, we are looking to the sea. The popular choice is more fish and seafood...as long as it's healthy for us because it comes from healthy ocean waters.

Winning in the post-COVID19 market is a simple equation: smaller portions of fish and seafood, more sustainably raised, menued, and served more often alongside a diversity of plant-based ingredients. This is a spot-on for diners more eager to eat out than ever before.

To learn more, find us at www.changingtastes.net.



Changing Tastes is a values-driven consultancy firm that provides business strategy and culinary consulting to Fortune 500 companies, growth stage restaurant and hospitality businesses, investors, and the philanthropic sector.



www.changingtastes.net

changing  tastes