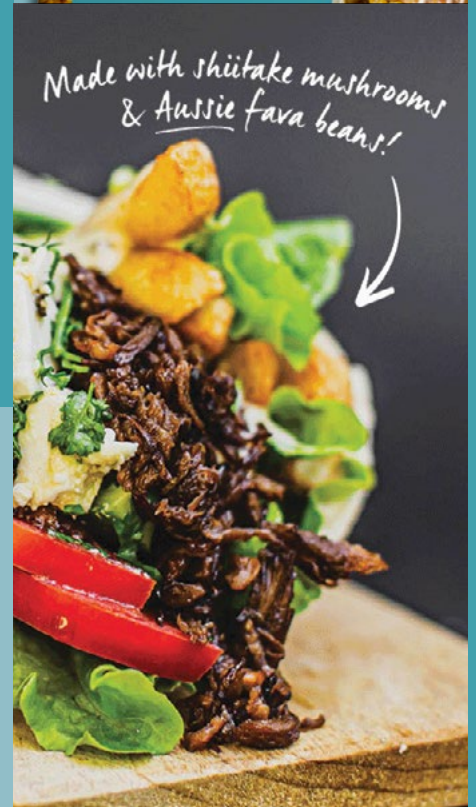




YEAR IN REVIEW

2021





Dear friends,

Reflecting on this year, I'm inspired by a palpable sense of momentum and transformation in the alternative proteins sector here and around the globe.

With well over US\$3B in new investment worldwide in 2021, leading agri-food pioneers and global corporations alike are swiftly diversifying the protein market to bring new options to increasingly health and eco-conscious consumers.

Food Frontier continued to enable the connections and conversations to drive progress in these emerging protein sectors in Australia and New Zealand, fueled by our research and resources – including our *2020 State of the Industry* report, Export Market Guides, industry roundtables and much more. I am both proud and grateful for what our small team has continued to achieve amidst a challenging year.

Looking ahead, 2022 is shaping up to be possibly our most exciting year yet. We hope to see many of you as we host the first-ever alternative proteins conference in our region, AltProteins 22, which will enable the critical dialogue and collaboration required to realise this industry's potential.

We remain immensely grateful to our supporters for enabling Food Frontier's work in creating a stronger food future.

Thomas King
Founder
Food Frontier

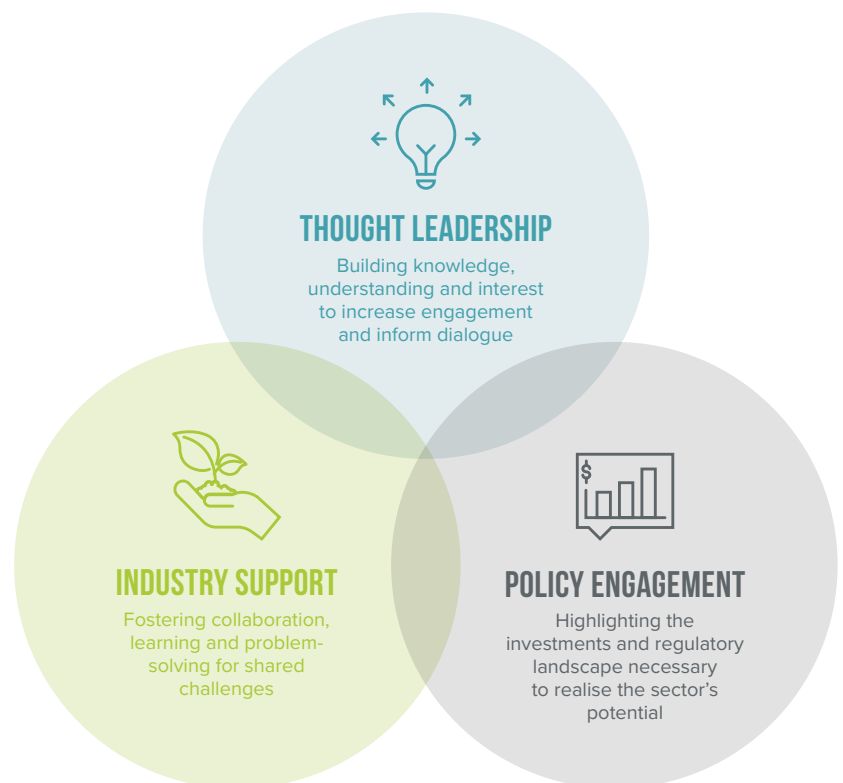
OUR PURPOSE

With the world's population tipped to reach 10 billion by 2050, demand for protein will continue to rise. Global economic, environmental and public health authorities have stressed that a greater diversity of protein sources will be essential to feed growing populations safely and sustainably into the future.

As the independent think tank on alternative proteins in Australia and New Zealand, we're committed to growing our region's protein supply with new, sustainable and nutritious options that create value for businesses, farmers and consumers.

OUR APPROACH

Food Frontier helps industry, policymakers and innovators to understand the emergence and unlock the benefits of plant-based meat, precision fermentation and cultivated meat. As an educator and facilitator at the centre of our region's alternative proteins ecosystem, we execute our work through three programmatic areas:



OUR YEAR IN NUMBERS



4100+

DOWNLOADS

of our reports and resources, covering economic modelling and market analysis, to export profiles and nutrition data



16M+

MEDIA IMPRESSIONS

across TV, radio, print, podcast and online channels, with 40% of all related media coverage featuring our interviews, quotes or research references



225K+

SOCIAL IMPRESSIONS

across Facebook, LinkedIn, Twitter and our website News page from content featuring the latest global and local developments, along with an average of 15% growth in followers across our social and owned channels



17

PRESENTATIONS

including on-stage and online keynotes, presentations and panels at some of the region's foremost agriculture, food technology, foodservice and alternative proteins events



240+

DIRECT CONVERSATIONS

with influential stakeholders, from leading manufacturers and retail giants, to national agricultural bodies and public officials



45+

INTRODUCTIONS BROKERED

introductions made for local alternative proteins pioneers, facilitating tailored connections to investors, researchers, retailers, government and supply chain operators



100%

AMONGST THE INDUSTRY

industry roundtable attendees unanimously agreed 'Food Frontier plays an essential role in supporting the growth of the sector'

DELIVERING DATA & INSIGHTS



4100+

**DOWNLOADS
OF REPORTS &
RESOURCES**



16M+

**MEDIA
IMPRESSIONS**
& FEATURING IN
40% OF RELATED
MEDIA COVERAGE



225K+

**SOCIAL MEDIA
IMPRESSIONS**



17

PRESENTATIONS

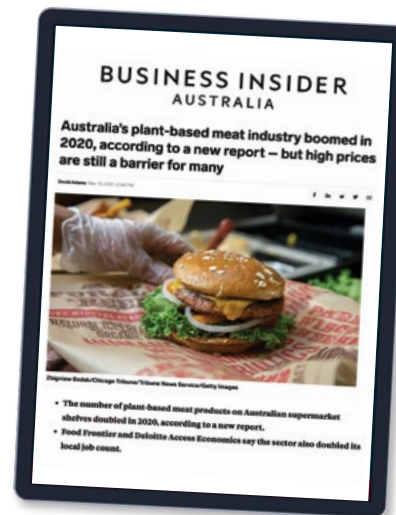
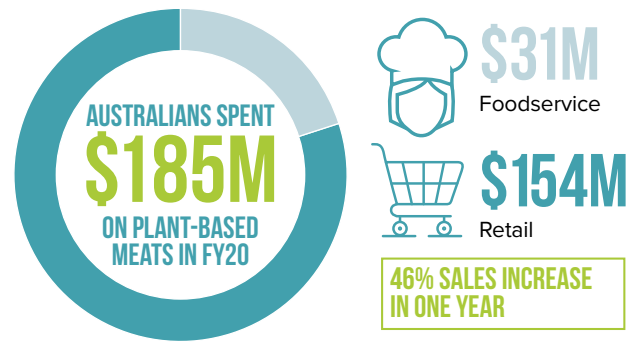
2020 STATE OF THE INDUSTRY

Following Food Frontier's inaugural economic modelling of the Australian plant-based meat sector in 2019, our *2020 State of the Industry* report provided sector-wide data illustrating the industry's exponential growth over FY20.

With new economic analysis conducted by Deloitte Access Economics demonstrating a doubling of industry revenue, jobs and product offerings, Food Frontier was able to drive a national narrative about the exciting evolution of the sector and its significant untapped opportunities for businesses and farmers in Australia. The report's key findings were of great interest to agri-food industry media and mainstream outlets favoured by government stakeholders, netting a signature primetime story on ABC Radio National, as well as ABC Midday News, Business Insider AU, Inside FMCG, *Stock & Land*, and more.



The report identified interventions to unlock the projected future value of Australia's plant-based meat industry, offering recommendations and insights for government, farming bodies, ingredient suppliers and retailers. Our direct engagement with these stakeholders to share the report's findings and insights, along with media storytelling, has continued to grow understanding and drive progress in this young, value-adding sector. Since the report's launch, which garnered 9.7M media impressions, its data has been referenced a further 94 times in national and regional media across the region this year.



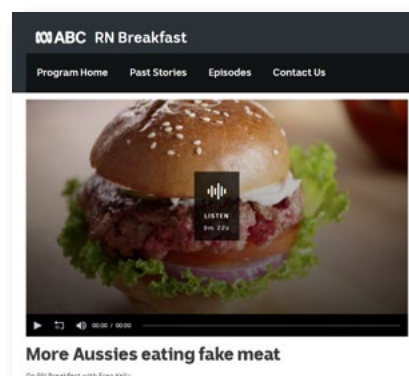
AMPLIFYING INSIGHTS TO DRIVE INFORMED DIALOGUE

Food Frontier's commentary, data and insights supported a steady drumbeat of media stories about cultivated meat, precision fermentation, and the rise of plant-based meat over 2021, garnering 16M impressions and appearing in 40% of all related coverage in our region. Our previous research reports continued to drive a portion of this coverage, with 29 mentions of Food Frontier's 2020 and 2019 reports' data.

Top media included a national profile of founder Thomas King on ABC's One Plus One, as well as stories in *The Herald Sun*, *The Guardian*, ABC Weekends radio, CHOICE magazine and many more. We amplified these and other key stories about the sector through our monthly newsletter, which has seen a 41% growth in subscribers

this year and an industry-high open rate of 39%.

Our role as an educator at the centre of our region's alternative proteins ecosystem brought these same data and insights to key organisations across government, the agri-food industry, academia, retail, foodservice and agriculture through 17 presentations, including keynotes, presentations and panels.



SUPPORTING INDUSTRY & POLICYMAKERS



240+

DIRECT
CONVERSATIONS



45+

INTRODUCTIONS
BROKERED



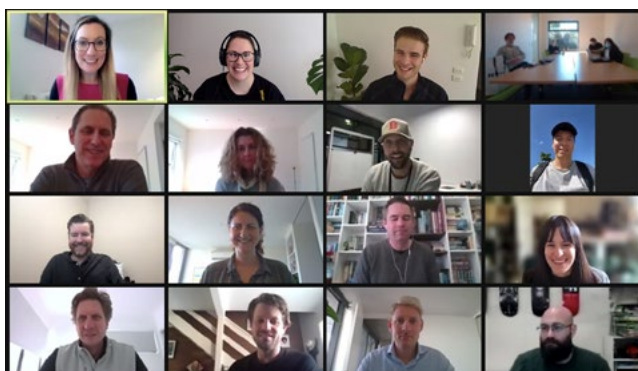
100%

AMONGST INDUSTRY
AGREED FOOD
FRONTIER PLAYS AN
ESSENTIAL ROLE

ENGAGING 1:1 & HOSTING FORUMS

Core to Food Frontier's work is extensive engagement with leaders across the public sector, alternative proteins industry, and broader agri-food landscape, to translate key insights and facilitate collaboration.

Our direct support of local alternative proteins companies included twice-yearly industry roundtables, focus groups on marketing and export, and helping to found and fulfil the secretariat role for the Alternative Proteins Council. We also had 240+ conversations and made a further 45+ introductions that powered continued growth of the sector.



This is the first category where there is such a depth of industry knowledge served to all in such a professional and resourced way. Big props to Food Frontier.

Tom Dusseldorp,
Director of Sales Marketing,
Allig Foods



SPOTLIGHTING EXPORT INSIGHTS & OPPORTUNITIES

Insights from our export focus group with companies led us to create a series of Export Market Profiles to provide information and guidance to local plant-based meat producers. Covering seven markets in Asia, these original resources provide aggregated market intelligence such as consumer insights, brands in-market and distribution information, in an aim to clarify the early stages of the export journey. The profiles were made freely available on our website, distributed directly to local companies, and shared in international trade promotion agency Austrade's monthly newsletter reaching an audience of 11K+.



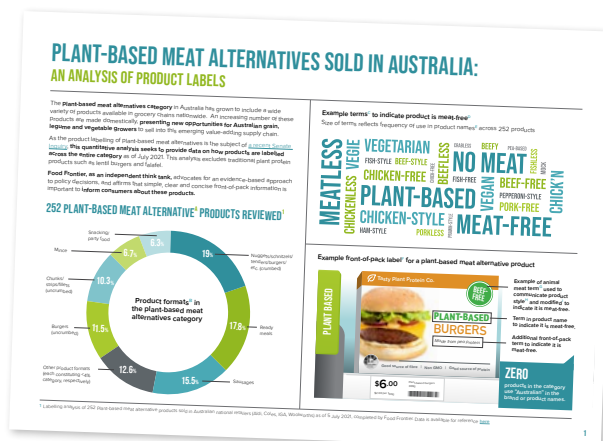
SUPPORTING INDUSTRY, ACADEMIC & GOVERNMENT COLLABORATION

Underpinning the broader alternative protein ecosystem is the continued investment in research and development. Food Frontier continued its support as a founding partner in the Plant Protein Cooperative Research Centres (PPCRC) bid, which is a proposed collaboration amongst 70+ industry, academic and government partners collectively contributing over \$270M in funding and in-kind resources, matched with a further \$60M Commonwealth funding. Food Frontier's role ensures the depth of our knowledge and networks is embedded into the heart of the PPCRC's research design. While the bid was unsuccessful this year, the bid team is well positioned to pursue it again in 2022.



INFORMING THE LABELLING DEBATE

Conversation about plant-based meat labelling in Australia peaked following the establishment of a Senate Inquiry on the topic. Amidst significant misinformation, Food Frontier sought to provide evidence-backed insights that would support the myriad of parties engaged in the debate, from food manufacturers to media, government to farmers. Our comprehensive analysis of the 250+ product labels nationwide demonstrated only a small minority were taking the labelling approach in question, evidence that we reiterated in a submission to the Inquiry, along with the context of the significant value that alternative proteins offer to Australia, including farmers and regional communities. The analysis was made publicly available, and founder Thomas King appeared at hearings for the Inquiry, as well as provided a voice across various media stories.



ENGAGE WITH US

Our work is founded on collaboration. If you share our vision of a nutritious, sustainable and diversified protein supply, join us in shaping the future of food.

DONATE

The generosity of our philanthropic supporters is why we exist – every dollar enables us to generate meaningful impact greater than most organisations our size. Make a tax-deductible gift via donate.foodfrontier.org or email us at giving@foodfrontier.org.

GET INVOLVED

Contribute to our next research publications, forums and events, or ongoing engagement with industry and policymakers as a volunteer, intern or fellow. Email us at info@foodfrontier.org to tell us about yourself and how you're interested in getting involved.

SUBSCRIBE

Keep up-to-date on the latest developments in alternative proteins via our monthly newsletter – subscribe on our homepage at foodfrontier.org.

PARTNER




Reach out to us at info@foodfrontier.org to discuss a potential research partnership, request a speaker for your upcoming event, or express interest in sponsoring a Food Frontier event.

GET DATA & INSIGHTS

Download our free research reports at foodfrontier.org/reports for the latest insights on alternative proteins – from market analysis and product labelling, to nutrition and consumer trends.

INTERVIEW US

To request an interview with one of our expert team members for your news story, email us at media@foodfrontier.org.

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