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The future of eating is flexitarian

Companies leading the way

Flexitarian eating: the role of business

Food companies have an important role in helping people make healthy and sustainable choices, including shifting to more plant-based eating with less and better meat.

The evidence demonstrating the need for such dietary shifts is clear and urgent. The 2015 Paris Climate Agreement commitments to keep global temperature rise within safe limits cannot be met without including dietary change as a priority solution. Additionally there is strong evidence that predominantly plant-based diets with smaller quantities of livestock products are necessary to tackle the spiralling health care costs to individuals, society and our NHS of obesity, heart disease, cancers and diabetes.

In this briefing we highlight over 20 companies that are leading the way in helping people make the shift – from food retailers and brands, to high street restaurant chains and food producers.

At Eating Better we celebrate and welcome the steps that an increasing number of food businesses are taking and we encourage them to go further. We also encourage many more food companies to see the business opportunities in the burgeoning flexitarian market – people who are cutting back on the amount of meat they eat. We'd also like to see companies serving customers expectations for 'better' meat.

The flexitarian market has become a major consumer trend with the UK one of the leading markets. And it is a growing market. Our latest YouGov research found 44% of British people willing or already committed to cutting down on meat or cutting it out from their diet. This is a market that is asking to be served better by restaurants, fast food chains, supermarkets, food producers and food service.

Many of our Eating Better alliance organisations are working directly with food companies on this path – see page 9 along with links to useful resources.

Please send us your company's relevant plans and developments so that we can continue to develop our case studies of companies leading the way (info@eating-better.org).



The market – the rise of the flexitarians

New 2017 YouGov research for Eating Better found 44% of people in Britain willing or already committed to cutting down on or cutting out meat eating.¹ Numerous surveys now confirm this major UK consumer trend towards 'flexitarian' eating, where people reduce their meat consumption without cutting it out completely. Earlier this year, Kantar Worldpanel reported that 41% of the population are now flexitarian, meat-reducers or semi-vegetarians.² And more than half of Brits (56%) think meat is not necessary to have a good meal, with only 18% stating the opposite.³

This changing attitude is even more marked among young people – dubbed 'Generation Moderation' by trend researchers,⁴ who also predict that excessive meat consumption will increasingly attract social disapproval. 37% of 16-24 year old women wish that their partner would 'eat less processed meat' and a third of adults believe that 'by 2025 good parents will generally not give hamburgers or sausages to their children'. The research found that, even amongst the stereotypically carnivorous, we appear to be witnessing a change in attitudes. For example, 37% of 16-24 year old males agree that 'eating red meat is bad for you'.

The reasons why people cut down on meat are varied. Concerns about animal welfare (38%), health (24%), and provenance (23%) are given as the top reasons for eating less meat, although environmental impact (21%) and saving money (19%) are also significant factors.⁵

Over the last ten years awareness of the negative impacts of meat for the environment has grown considerably. Back in 2007, just 14% of people accepted the link,⁶ compared to 31% in 2017 who agree that consuming and producing meat has a significant negative impact on the environment. Agreement is greatest among young people aged 18-25 (46%) compared to 20% in the over 65 age range.⁷

In our new survey,⁸ the British public said their top priorities to help them reduce their meat consumption were for restaurants and fast food chains to provide better choice of meat-free dishes or meals with less meat; for more price promotions for meat-free choices, more help with cooking vegetable-based dishes, more meat-free choices on school lunch menus and for supermarkets to provide more meat-free or lower meat ready meal choices.

Eating Better's Meat Free Lunch campaign

Eating Better's #MeatFreeLunch campaign is encouraging people to swap their lunchtime meat, fish, cheese or egg sandwich for a vegetable-based option, or try making their own. In our 2016 survey of 535 sandwiches and wraps from eight supermarkets (Asda, Boots, Co-op, Marks & Spencer, Morrisons, Sainsbury's, Tesco, Waitrose) and four high street sandwich chains (EAT, Greggs, Pret a Manger and Subway) we found that consumers trying to eat healthily and reduce their impact on the environment would struggle to find a great choice of sandwiches that fits the bill. Only 19 out of 535 (4%) were plant-based (ie did not contain meat, fish, cheese or eggs as main ingredients). The vast majority (77%) were meat or fish based.

Eating Better is calling on all retailers – regardless of their range size or customer demographic – to offer a good selection of varied, tasty, healthy and sustainable sandwich choices - with less meat, less dairy and more vegetables and pulses in their place.





Companies leading the way

We have selected examples to showcase the ways in which food business are responding positively to the less and better meat/more plant-based eating message, for example by developing or trialling new products, reformulating old favourites and opening up new possibilities in menus and aisles in ways that are creative and responsible. We focus mainly on the UK as one of the most dynamic markets but also include examples from elsewhere to inspire and celebrate what's possible.

Our inclusion of a company does not imply Eating Better endorsement of brands or companies' sustainability record in all respects – that is beyond the scope of this briefing. We also do not attempt to rank companies. But we do showcase companies that are, in one way or another, driving sustainable innovation towards healthy and sustainable eating in their own companies, product lines, and supply chains.

Mainstreaming healthy, more sustainable food options

Pret A Manger's aptly named campaign **Not just for Veggies** is the high street chain's response to increasing numbers of flexitarian customers looking for a broader, more exciting range of meat-free healthy and sustainable food options that will appeal to the whole of its customer base. Pret has trialled over 60 new vegetarian and plant-based products in the last year, rolling out monthly chef specials, opening two exclusively veggie stores in London and expanding the veggie product choice at all Pret stores. It has been a big success, **helping to push up the chain's sales and profits**.

IKEA took the plunge to 'green' its meatballs and introduced **plant-based balls in its stores** worldwide in 2015. The meatballs have lower calories and a lower environmental impact than their meat-based option. IKEA's **People & Planet Positive sustainability strategy** pledges to take a lead in a sustainable and healthy diet, with an explicit aim to promote and enable a balanced diet focusing on vegetarian food, seafood and seeing meat as a treat.

Sodexo, one of the world's biggest contract caterers, has partnered with WWF-UK to develop a **'Green & Lean' meal range** and introduce them into its independent school contracts. The meals follow 10 simple principles that make them more nutritious and better for the environment. New recipes have been created and old favourites have been tweaked, for instance by substituting some of the meat with low-carbon, nutritious alternatives such as vegetables and pulses. The new meals also cost no more to produce than the meals on which they were based, showing sustainable eating doesn't need to come at a premium.

Compass Group USA has incorporated **Menus of Change Principles of Healthy, Sustainable Menus** into its catering operations. This includes increasing customers' access to vegetables and fruits and wholegrain foods with cooking that is globally inspired and largely plant-based; as well as including recipes and concepts where meat plays more of a supporting role, reducing red meat portion sizes and offerings, and leveraging strategies from seasonal and local flavours, vegetable proteins and global cuisines.

Helping customers to make better choices

We're pleased to see supermarkets and high street restaurant chains increasing the range of plant-based and flexitarian choices available.

In January 2017 **Marks and Spencer** responded to the growing demand for plant-based products by adding **two new vegan sandwiches** to their range.

In 2017 the **Co-op UK** has expanded its convenience range to include more meat-free options in their **Food to go and Ready meals lines**, with the aim to inspire all their customers. And **Tesco** is expanding its range of plantbased food products including 'free-from' **non-dairy cheeses**.

Several UK retailers have added new ranges of flexitarian products to their aisles. **Asda** now sells an own brand **'green and bean' lean mince** which contains 40% cooked haricot beans. Food manufacturers **ABP Food Group's 'Flexilicious' sausages** and **Finnebrogue Artisan's 'Funky Flexitarian' sausages** are a mix of meat with vegetables and pulses, can now be found at **Waitrose** and **Sainsbury's**.

A number of restaurant chains are also upping their plant-based choices including **Zizzi**, **Las Iguanas** and **Wetherspoons**.

In response to the **Soil Association's Out to Lunch survey** of healthy and sustainable children's food, the **Benugo restaurant at the Natural History Museum** responded by launching new and improved children and adult menus in December 2016. The menus include more veg, more meat-free options, and a greater diversity of proteins. Meat-free options are also promoted by being more prominently positioned on the menu.

US-based **Impossible Foods** has developed a 'meaty' 100% plant-based **Impossible Burger** designed to appeal to people who love meat and who wouldn't normally go for a vegetarian burger. Impossible Foods aims to be stocking 1000 restaurants in the US by the end of 2017, and making the burger available internationally in the coming years.

Catering for the rising trend in flexitarian and vegetarian eating, **Unilever** has **labelled 500 of its products** as suitable for vegetarians to make it easier for consumers to identify which products are suitable for plant-rich diets.



Normalising the 'less meat' message

Making less and better meat the norm requires creative ways to engage customers. Sometimes stealth is a successful tactic – by making the non-meat choice the default or top menu choice – to nudge our behaviour, whether in a canteen or a top restaurant.

For example London's **Grain Store** restaurant **puts vegetables centre plate**. Even for dishes that include a meat or fish element, vegetables are given equal billing, if not the starring role. And **mac Birmingham – the restaurant at the city's popular art centre** – is giving meat-free dishes ample space on their menu by offering 11 non-meat main meals, comprising more than 50% of the menu.

World Meat Free Day, backed by **Quorn** and many other partners is raising awareness and encouraging people to consider going meat-free more often. Companies can pledge their support.

In the summer of 2016 we were pleased to hear that UK **music festival Shambala** went veggie to demonstrate how well you can eat without meat and has plans in 2017 to build on the positive response they received.

Swedish supermarket chain Co-op in its **'Dear Meat' advertising campaign**, asks its customers to say a tender farewell to meat as an everyday food, and to share family friendly meatless dishes on social media *#TheNewEverydayFood*. In May 2017 **Tesco's Food Love Stories** campaign partnered with 'plant-pushing' chef Derek Sarno to produce an **advert** and recipes to help customers make healthier choices.

Researchers at the University of Oxford are working with **Sainsbury's** on a **major project** to run trials in its stores to find out what works to **encourage people to eat less meat and more veg**. The project begins in late spring 2017 and will run for four years.

Supporting 'better' meat and dairy production

Waitrose has an **explicit commitment** to high animal welfare standards, and the farmers that deliver it, for all its own brand products. It is the only major retailer in the UK to guarantee **at least 100 days of outdoor grazing every year** for all dairy cows producing the supermarket's milk. Their policies have earned them Compassion in World Farming's **'Best Retailer' award** five times.

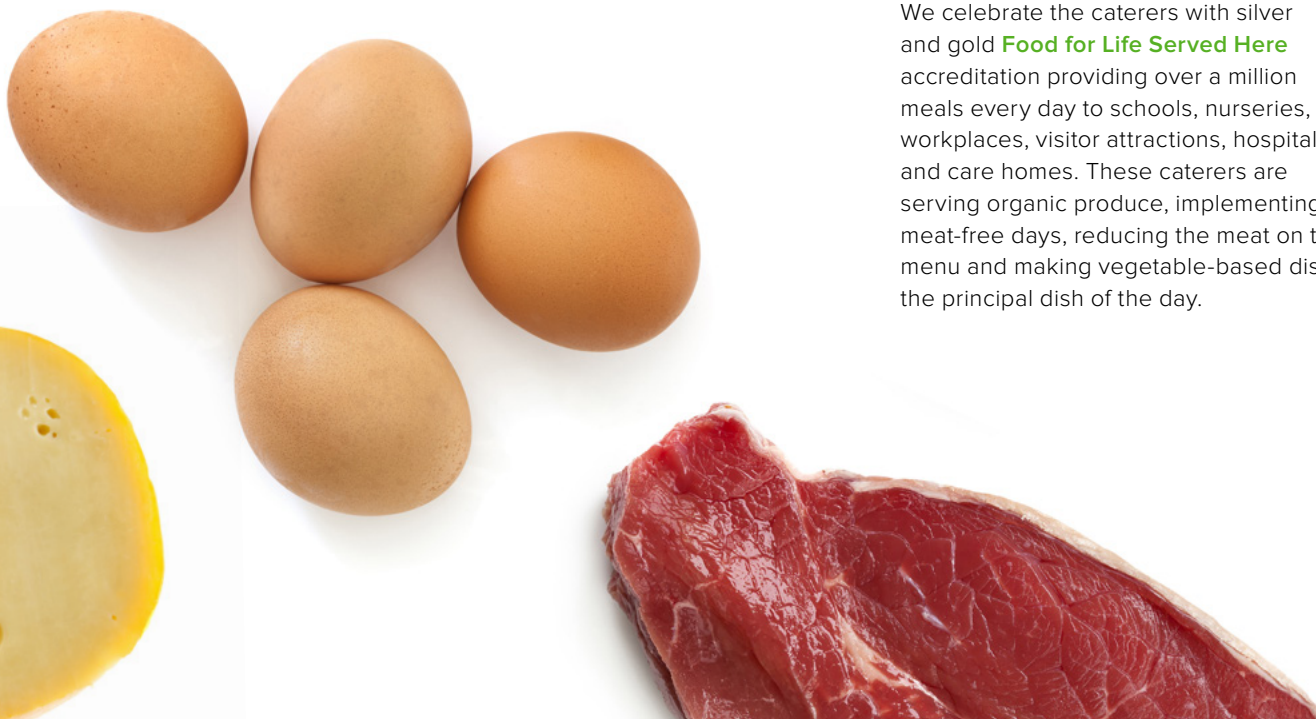
McDonald's has taken steps to improve the production standards of its products by **sourcing certified ingredients**. The high street chain sources ingredients with credible accreditation including some organic milk, free-range eggs, RSPCA pork, and Marine Stewardship Council fish. The company's **Sustainable Beef Clubs** helps UK farmers reduce their carbon emissions.

A number of companies have or are beginning to make meaningful commitments to phasing out routine antibiotic use in livestock production, including in the UK **Mitchells & Butlers** and the **Restaurant Group**.

The **Pasture for Life mark** certifies beef and lamb that comes from animals raised only on pasture, without any use of grains or manufactured feeds. All the farms are visited to make sure the farmers follow a set of agreed production standards, based on the animal's natural diet but also including welfare standards and wildlife-friendly practices.

Asda is the first retailer to stock milk with the **Free Range Dairy Pasture Promise** milk – the only certification that gives a clear assurance that milk comes from cows that enjoy the freedom to graze for at least six months of the year.

We celebrate the caterers with silver and gold **Food for Life Served Here** accreditation providing over a million meals every day to schools, nurseries, workplaces, visitor attractions, hospitals and care homes. These caterers are serving organic produce, implementing meat-free days, reducing the meat on the menu and making vegetable-based dishes the principal dish of the day.



Our asks of food companies

The food sector as a whole has an enormous role to play in helping its customers shift to eating less and better meat and more plant-based foods. It can do this by making it easy, affordable and desirable, with quality tasty products, and by collaborating with civil society and governments to drive change in dietary norms. While there is growing interest in less & better meat/more plant-based eating, there is unmet demand for new products, ingredients and menu options. Our YouGov survey found the public wanting to see companies offer many more meat-free and lower meat choices.

Overleaf we outline our top suggestions for the best ways companies can take advantage of these burgeoning opportunities.



1. Restaurants, fast food chains and the food service sector

- Develop menus to provide a greater choice of less meat/more plant based dishes that taste great.
- Introduce more exciting flavours and ingredients within existing plant-based products to attract a larger number of customers.
- Consider describing plant-based dishes without using the words vegetarian/vegan, as our insight shows this can substantially increase uptake of dishes/products. Suitable alternatives include 'fresh', 'lighter' or 'delicious'.
- Position lower meat and meat-free options at the top of menu (not as an add-on) or at beginning/front of self-service counters.
- Serve small portions of 'better meat', e.g. free-range, organic, pasture-reared, locally sourced meat, and market as a distinctive specialty.
- Ensure chefs are trained in plant-based cooking and recipe development.
- Price plant rich dishes/menu items at a comparatively affordable price for customers.

2. Food product manufacturers and retailers

- Reformulate existing products to provide a greater ratio of plant protein (e.g. using pulse-based or mushroom ingredients).
- Invest in or collaborate with companies offering plant-based meat substitutes.
- Introduce more exciting flavours and ingredients within existing plant-based products to attract a larger number of consumers.
- Make plant-rich products available to purchase at an affordable price for customers.
- Consider price promotions and placement within store to encourage trials and repeat purchasing.

3. Engaging consumers

Brands and retailers can encourage consumers to eat more diverse, plant-rich diets through:

- Brand-led campaigns, highlighting the nutrition and sustainability benefits of a plant-based diet with less and better meat.
- Collaborations with related brands or retailers.
- Promoting campaigns e.g. Meat Free Monday, World Meat Free Day, veg sandwiches during British Sandwich Week.
- Promoting cuisines and recipes where the veg is the 'star' of the meal.
- Helping people to make the transition from meat to plants through accessible recipes and suggestions. Collaborations with chefs could be particularly effective.

4. Achieving broader impact

Food companies can achieve broader impact by aligning with government and NGO-led initiatives. This could include:

- Supporting and implementing national health guidelines (e.g. Eatwell Guide) in product ranges and through marketing.
- Involvement in campaigns such as Meat Free Monday, National Vegetarian Week and World Meat Free Day.
- Promoting plant-based diets and cooking via schools programmes.
- Commissioning and promoting academic research that makes the case for plant-based diets.
- Retailers and food manufacturers can influence demand for plant-based ingredients through buying practices – via supplier requirements. Where supply is not available or sufficient, new partnerships and collaborations with retailers or manufacturers can be formed to develop new solutions at scale.



Resources

Shaping the future of protein: the Protein Challenge 2040: Accelerating Innovation and Action (2017) Forum for the Future.

Designed with health in mind: A psychological approach to helping consumers make healthier choices in foodservice (2017) Amy Fetzner, Footprint Intelligence & Compass Group.

Shifting Diets for a Sustainable Food Future (2016) World Resources Institute.

'We will live as we will eat: Anticipating the future power of sustainability and our shifting food culture' (2016), James Murphy & Martin Thomas, Dissident.

Catering for Sustainability: Making the Case for Sustainable Diets in Foodservice (2016) WWF-UK, Sodexo UK & Ireland & the Food Ethics Council.

What is the role of plant-based foods in future diets? (2016) Forum for the Future.

The Future of Food: The investment case for a Protein Shake Up (2016) FAIRR & ShareAction.

The Case for Protein Diversity: Accelerating the adoption of more sustainable eating patterns (2015) Carbon Trust.

Principles of Health and Sustainable Eating Patterns (2015) Global Food Security Programme.

Let's Talk About Meat: Changing dietary behaviour for the 21st century (2014) Sue Dibb & Dr Ian Fitzpatrick, Eating Better.

Foodsource, Food Climate Research Network.
A free and evolving resource on food systems and sustainability.

Organisations that work with food businesses for sustainable diets

The following organisations, including many that are part of the Eating Better alliance, provide support, inspiration and practical resources for food businesses looking to make their offer healthier and more sustainable.

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Behaviour Change works with partners across the food industry to encourage families to eat more vegetables, with projects including **Dabble with your Dinner** and **Eat Seasonably**.

Compassion in World Farming works with companies to improve their animal welfare-friendly sourcing. CiWF's **Food Business Awards** acknowledge companies or brands that are committed to raising farm animals in higher welfare systems.

Carbon Trust provides services to companies and the public sector to help reduce their environmental footprint.

Eternity's software allows restaurants to track and measure the carbon footprint of all their meals and purchases.

Food for Life partnership works with schools, nurseries, hospitals and care homes to provide healthy, tasty and sustainable food.

Peas Please from the **Food Foundation** engages producers and food businesses to increase vegetable consumption in a sustainable manner.

Protein Challenge 2040 from **Forum for the Future** works with a coalition of business partners to explore how to increase consumption of plant-based protein.

Hubbub works with communities and companies to create **positive campaigns** that inspire people to make healthier, greener food and lifestyle choices.

Humane Society International UK runs **Forward Food** culinary training sessions, teaching chefs how to create and present delicious plant-based dishes.

IntoLife's software allows food service businesses to integrate sustainability into their menus, sales and procurement, leading to healthier meals, more profitable food service and lower environmental impacts.

The **LEAF marque** is an assurance system recognising sustainably farmed products based on LEAF's Integrated Farm Management principles.

Meat Free Monday encourages people to skip meat for at least one day a week. MFM's **school programme** includes catering recipes, meat free nutrition advice and marketing ideas.

ShareAction, in partnership with the FAIRR Initiative and a coalition of institutional investors, **encourages food companies to adopt and promote plant-based proteins** and the responsible use of antibiotics in livestock.

Soil Association certification inspects and awards organic certification to farms and businesses that meet Soil Association's organic standards.

The **Sustainable Restaurant Association's Food Made Good** programme is building a community of chefs, restaurateurs, marketers, foodies and social changers working together to make food good for people and the planet.

Vegetarian Society certifies vegetarian and vegan products, runs National Vegetarian Week and provides training for professional chefs at its Cordon Vert Cookery School.

The World Resources Institute's Better Buying Lab partners with major companies, including Sodexo, Unilever and Sainsbury's, to help shift consumer behaviour toward more sustainable, plant-based foods.

WWF-UK works internationally to safeguard the natural world. Its partnerships with businesses include developing solutions for sustainable diets.

Eating Better is an alliance of over 50 civil society organisations working to build consensus and develop collaborative practical approaches to engage policy makers, food businesses and civil society to catalyse shifts towards healthy and sustainable eating patterns. Eating Better encourages a culture where we place greater value on the food we eat, the animals that provide it and the people who produce it. Eating Better supports farmers who produce meat in a sustainable way.

Moderating our meat consumption – whether red, white or processed meats – while also choosing ‘better’ meat that is naturally fed, has a known provenance and is produced to high animal welfare, environmental and quality standards can help support farmers without being more expensive for consumers. A ‘less but better’ approach to meat with meals based around a greater variety of plant-based foods will ensure healthy, balanced diets that are better for the planet and for fairer food systems too.

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