Sustainable Nutrition : A dairy lense

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Brand Progress Through Strategic Imagination

Introduction

What is Sustainable Nutrition?

Interconnected challenges, joined up outcomes

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Objectives & Methodology

- Core Objective: Bring consistent clarity to the consumer and customer viewpoints and behaviours around the topic of Sustainable Nutrition

- Multi-lens project encompassing:

    - Desk discovery of 40+ published pieces of research
    - Refresh of Global Policy and Legislation
    - N=12,000 consumer quantitative study conducted across eight markets (Ireland, UK, Germany, France, The Netherlands, USA, China and Japan)

- Led by Empathy and Futavista with expert input from Sustainability Works

Overall Content – Breath and Depth of the Research

- ✓ Efforts made to be sustainable, to exercise and eat right
- ✓ Diets followed and how they are evolving
- ✓ Attention and knowledge in relation to sustainability and nutritious food choices
- ✓ Purchase behaviour in relation to organic food
- ✓ Key areas of importance in relation to Sustainability and Nutrition
- ✓ Emergent and Dominant areas of importance and impact on purchase behaviour
- ✓ Attitudes towards Carbon and Carbon Labelling
- ✓ Attitudes towards messaging and communication in relation to Sustainability and Nutrition
- ✓ Where the responsibility lies for improvements in relation to the environment
- ✓ Motivations for making food choices which are sustainable and healthy/nutritious
- ✓ Triggers and barriers to future food choices which are sustainable and healthy/nutritious
- ✓ The role of Technology and AI in food choices and behaviours
- ✓ The impact of weight loss medicines

- ✓ Category understanding across n=7 key categories: Dairy, Meat, Pre-Prepared Meals, Seafood, Bakery, Sausages & Bacon, Fruit & veg

Sustainable Nutrition – Context

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Mapping Sustainable Nutrition – Key Themes

There are multiple themes that are contained within the idea of Sustainable Nutrition

In order to bring the logic and organisation needed for comprehension we have created a map of Key Themes

This map demonstrates

-On the Horizontal axis - which topics are more closely linked to Sustainability or Nutrition (or both)

-On the Vertical – which topics are more of concern to Agenda setters (the Agenda Sphere) or to consumers/ buyers (Consumption sphere)

Agenda Sphere
(policy / thought leader / emergent)

Important for Both

Personal Sphere
(Consumer / Buyer mainstream/ dominant)

+Sustainability | **Both Topics** | **+Nutrition/Health**

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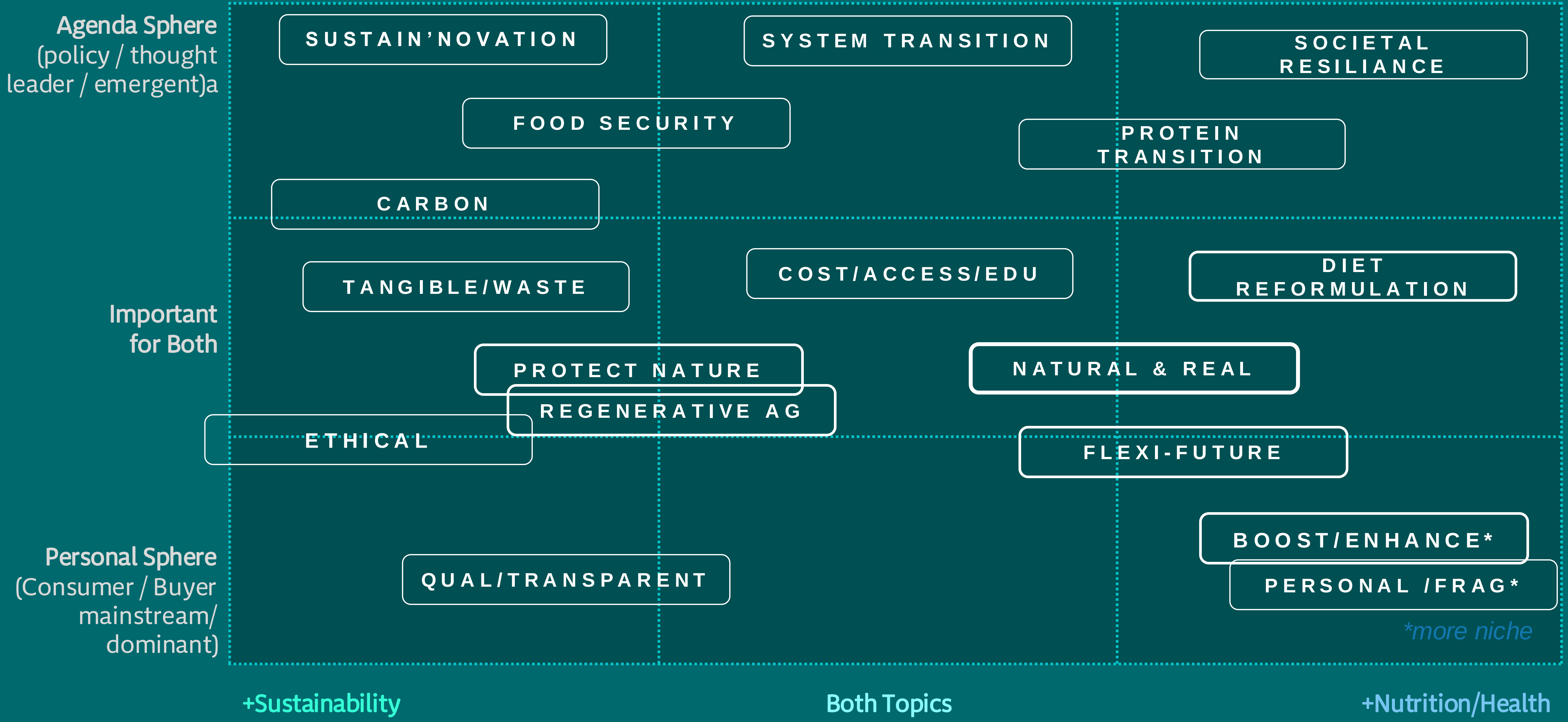
Mapping Sustainable Nutrition – Key Themes



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Our Segmentation uses these elements of knowledge and attention to group people from those Pro-Actively making choices to those who are paying little attention and have little knowledge.

The Disregarders

The Majority Followers

The Well Intended

The Pro-Actives

Low levels of knowledge when it comes to making food / nutrition choices which are sustainable

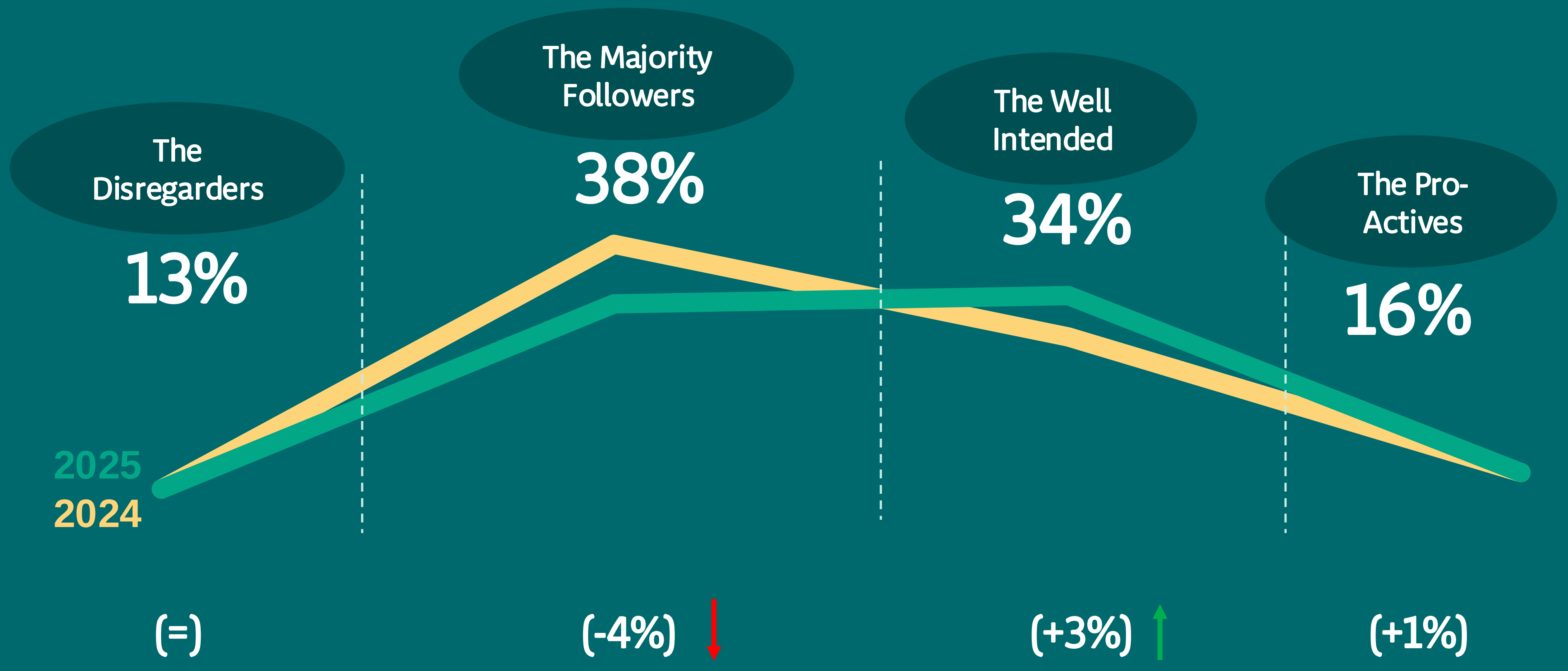
No attention being paid in making food or nutritional choices to ensure they are healthy or sustainable

MOVEMENT

Very high level of knowledge when it comes to making food / nutrition choices which are sustainable

Paying a lot of attention being paid in making food or nutritional choices to ensure they are healthy or sustainable

We are recording growth higher up in the adoption curve, with growth in the proportion who are "Well intended" segment, while the incidence of "Majority Followers" declines.



(2024 Sustainable Nutrition)

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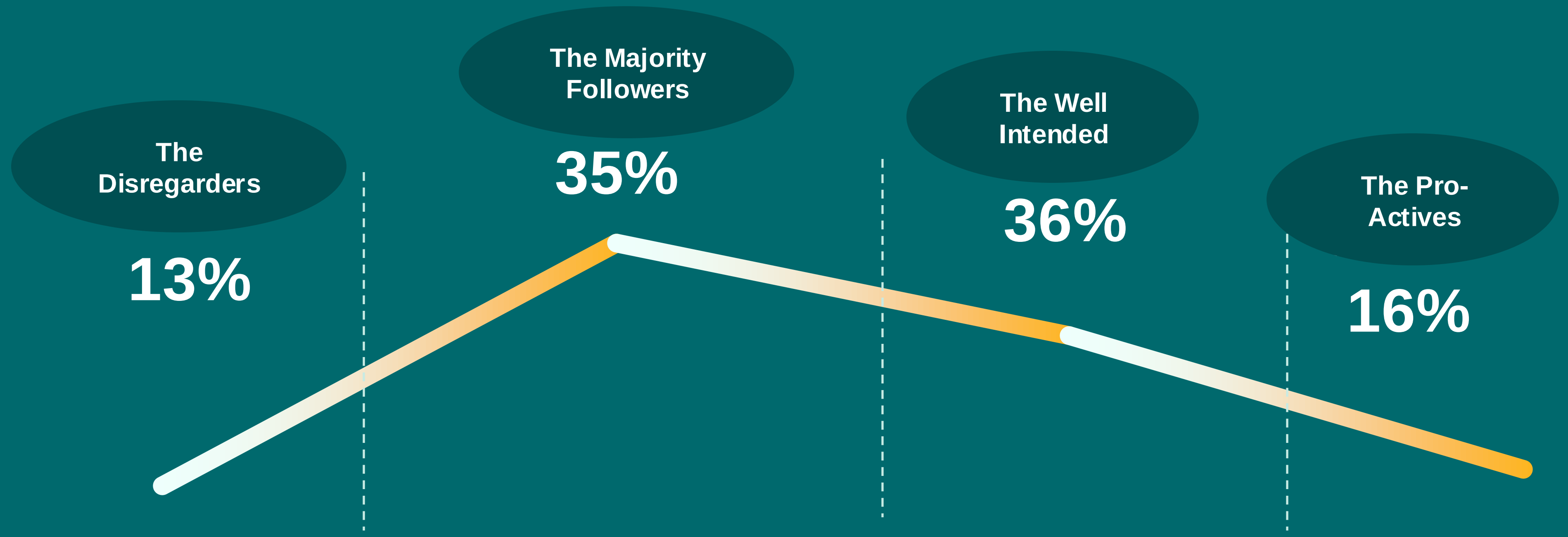
Household Income is a clear differentiator when it comes to levels of knowledge, attention and adoption. US market quite polarised.



Oldest grouping overall.
More likely to be US residents

Lowest household income

Tend to be older.
More likely to be DE residents

Below average household income

Youngest Segment (more likely to be 18—34). DE and FR.

Average household income

More likely to be aged 25-44
More likely to be US residents

Highest household income

HOUSEHOLD INCOME

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Sustainable Nutrition – Themes: New and Changing

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Themes: New and Changing

Food Security

Natural Nutrition

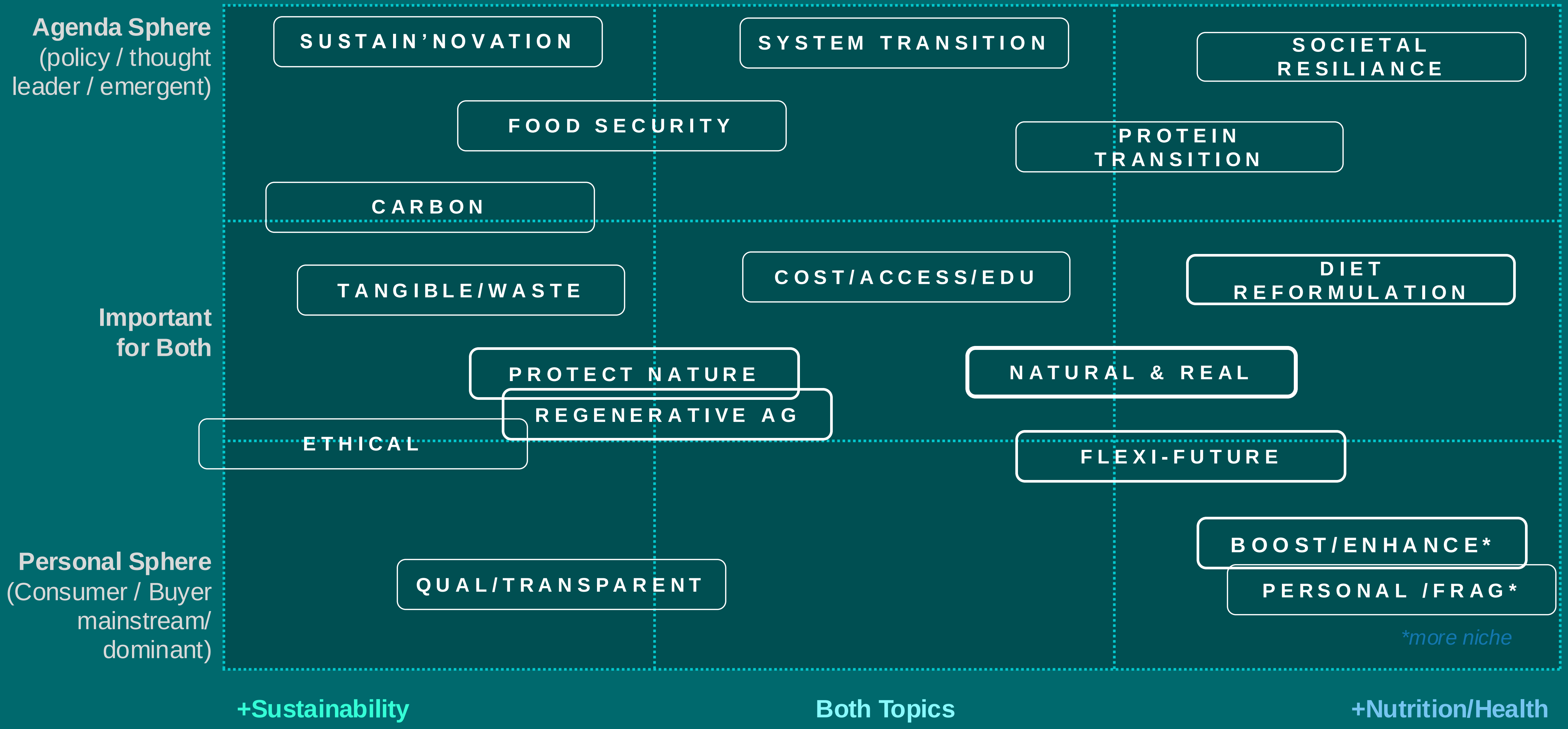
Plant & Animal Protein

Roots of Change

The New Weight rules

Personalisation and AI

We will use our Themes Map to navigate each of these areas

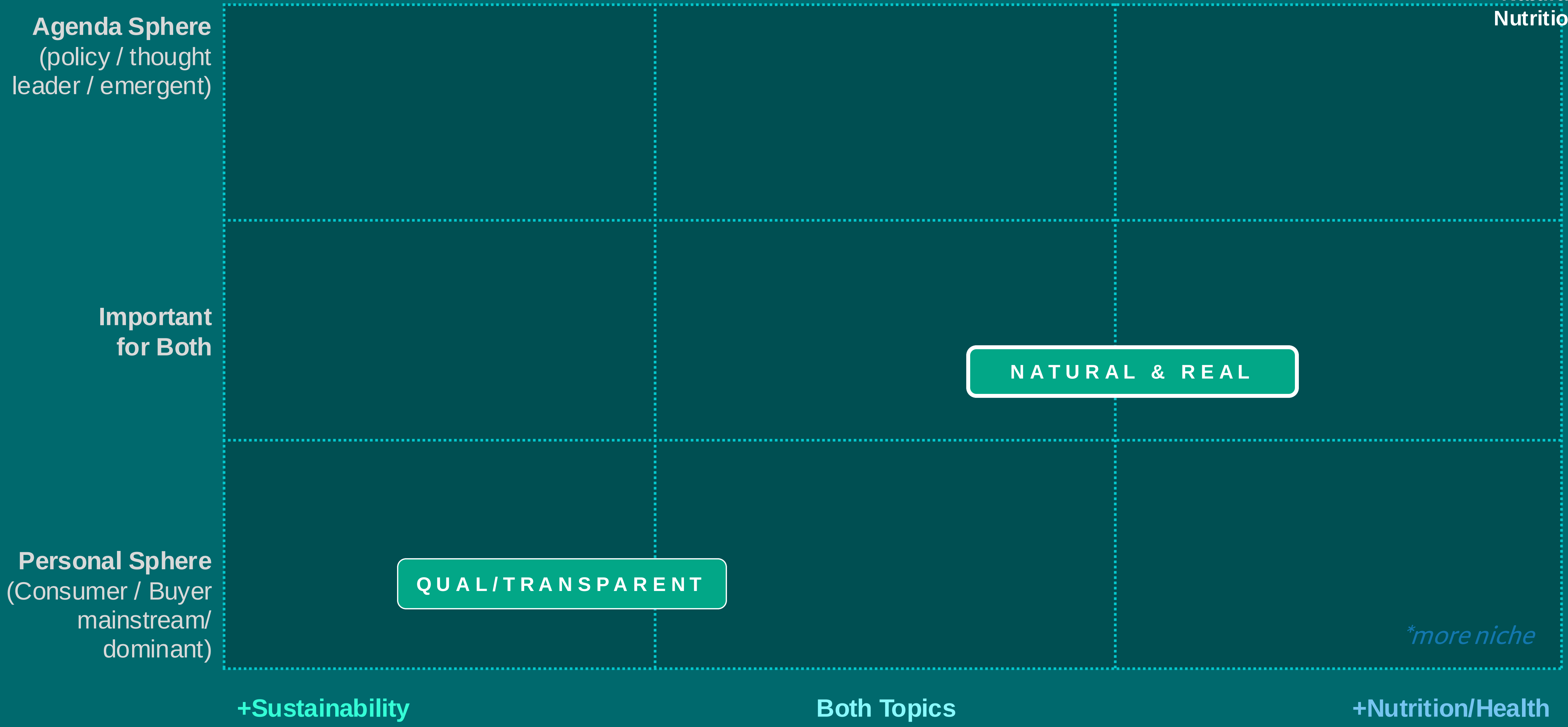


Natural Nutrition

What’s Emerging?

Theme : Natural Nutrition – The continued emphasis & desire for natural and real products

Natural Nutrition



Theme : Natural Nutrition ~ The Nutrition POV

Context: From a Nutrition & Health POV there is a continued and evolving desire for food & beverage that is more natural and closer to nature / its natural state. This manifests in several ways.

(i) Natural & Clean label

- Clean Labelling continues across multiple industries including health, OTC pharma, beauty and F&B.
- Production innovations focusing on challenges like shelf life / stability.
- Transparency & simplicity remains critical on pack and in comms.
- Sustainable packaging & plant based are often seen as part of a clean label offering.

(ii) UPF Alarm

- Over time 'Processing' innovations have been key in delivering convenience and shelf life for food.
- But, the increased focus on natural has brought UPF into the spotlight for consumers – driven by claimed medical and online influencers/ experts

- Advent of 'UPF-Free' claims on packaging (but also likely increasing consumer label confusion)

(iii) Science & Hacks

- This tension between 'natural' and the convenience of processed foods is a consumer problem worth solving
- Life-hack solutions that seek to give the convenience with natural solutions e.g. 'Winning' offers simple frozen food blocks or 'Lego'

- Science and technology solutions revolve around 'freshness' – bio-film or fridge freshness technologies

Natural Nutrition

Where is the Consumer?

Natural Nutrition: The Numbers

Natural Nutrition

While modest, the momentum is positive for most aspects focussed on nature.

Level of Importance

NATURAL & REAL

53% (=)

Becoming More Important

NATURAL & REAL

38% (+2)

Actively Purchase on this basis

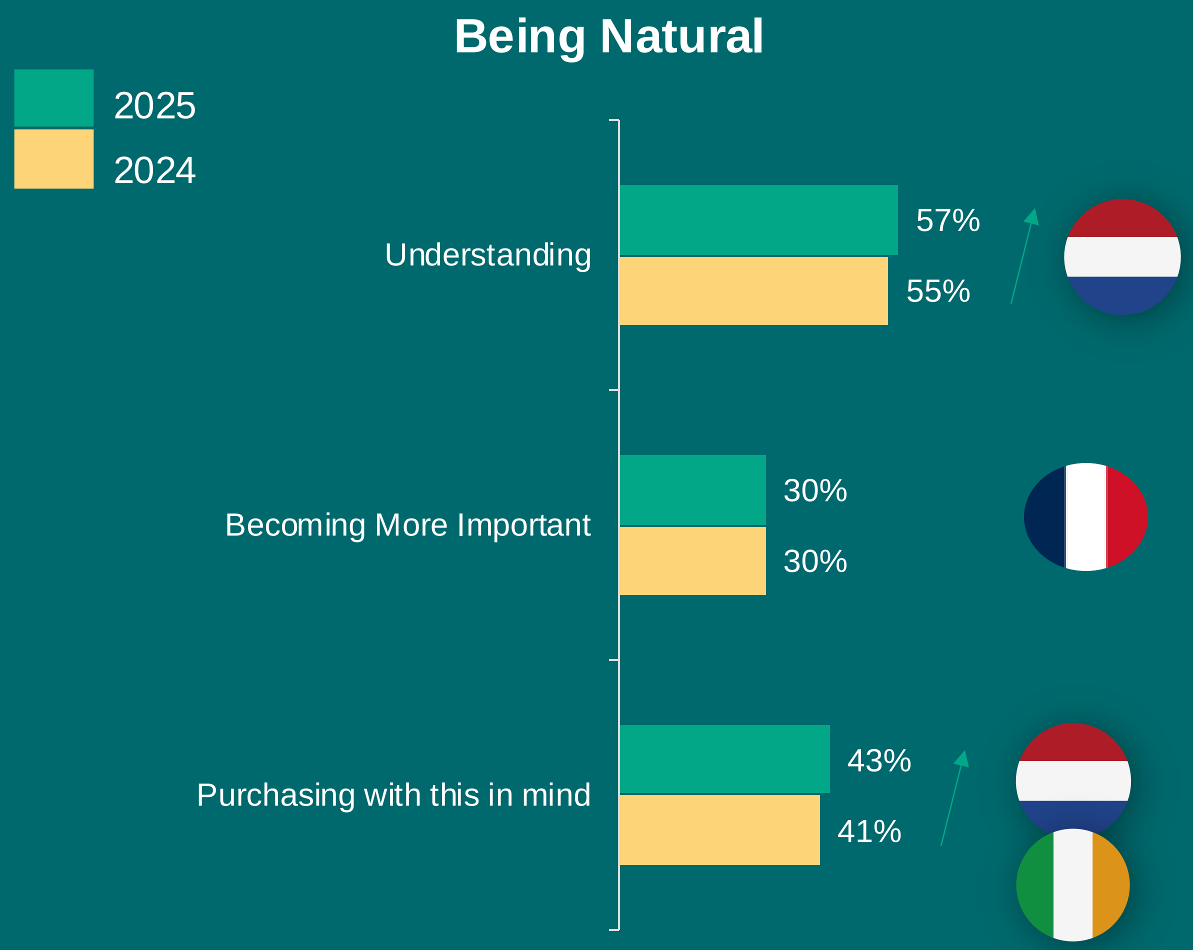
NATURAL & REAL

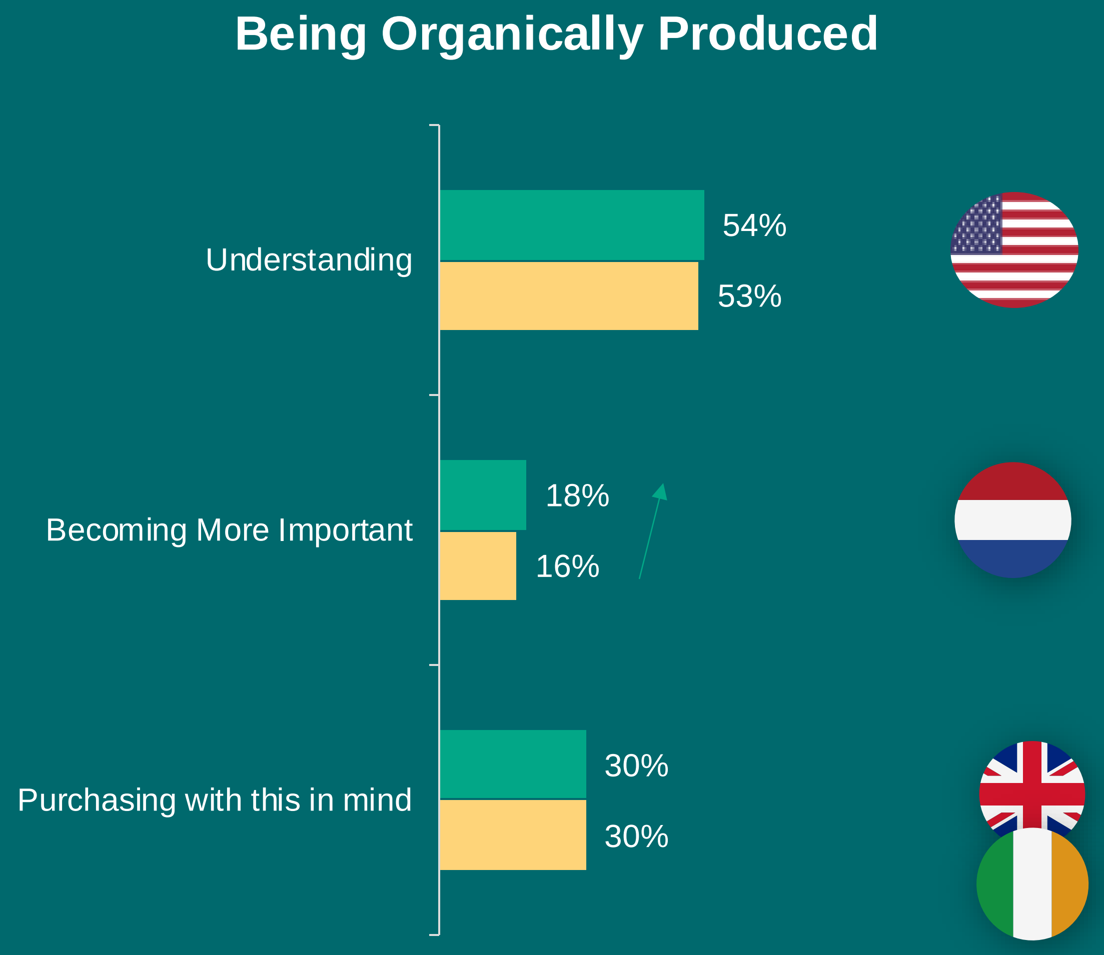
51% (+2)

Natural Nutrition: Elements Driving Growth

Both elements of larger "Natural & Real" topic growing year-on-year on key aspects

Natural Nutrition



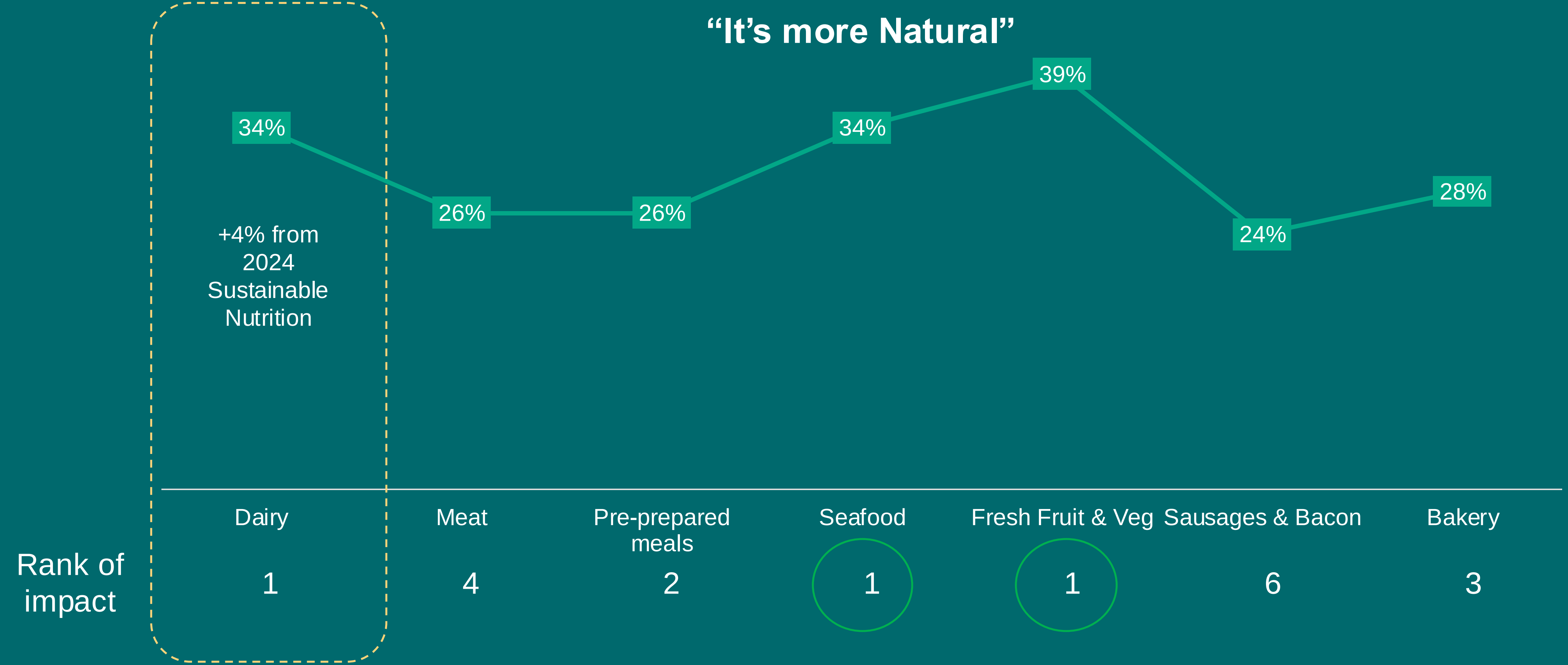


Being Natural & Real is ranked as the #1 more important aspect to consumers buying in the Dairy category – increasing year-on-year.

Natural Nutrition

Which of the following are most important to you in your decision to purchase items from this category?

“It’s more Natural”



And back to basics is seen as a clear way to reduce our overall impact on the environment, with organic purchase in Dairy on the rise

I think if we all went "back to basics" in terms of the foods we eat there wouldn't be a problem for the environment

% AGREE

65%

The Pro-Active & Well Intended segments more likely to agree with this

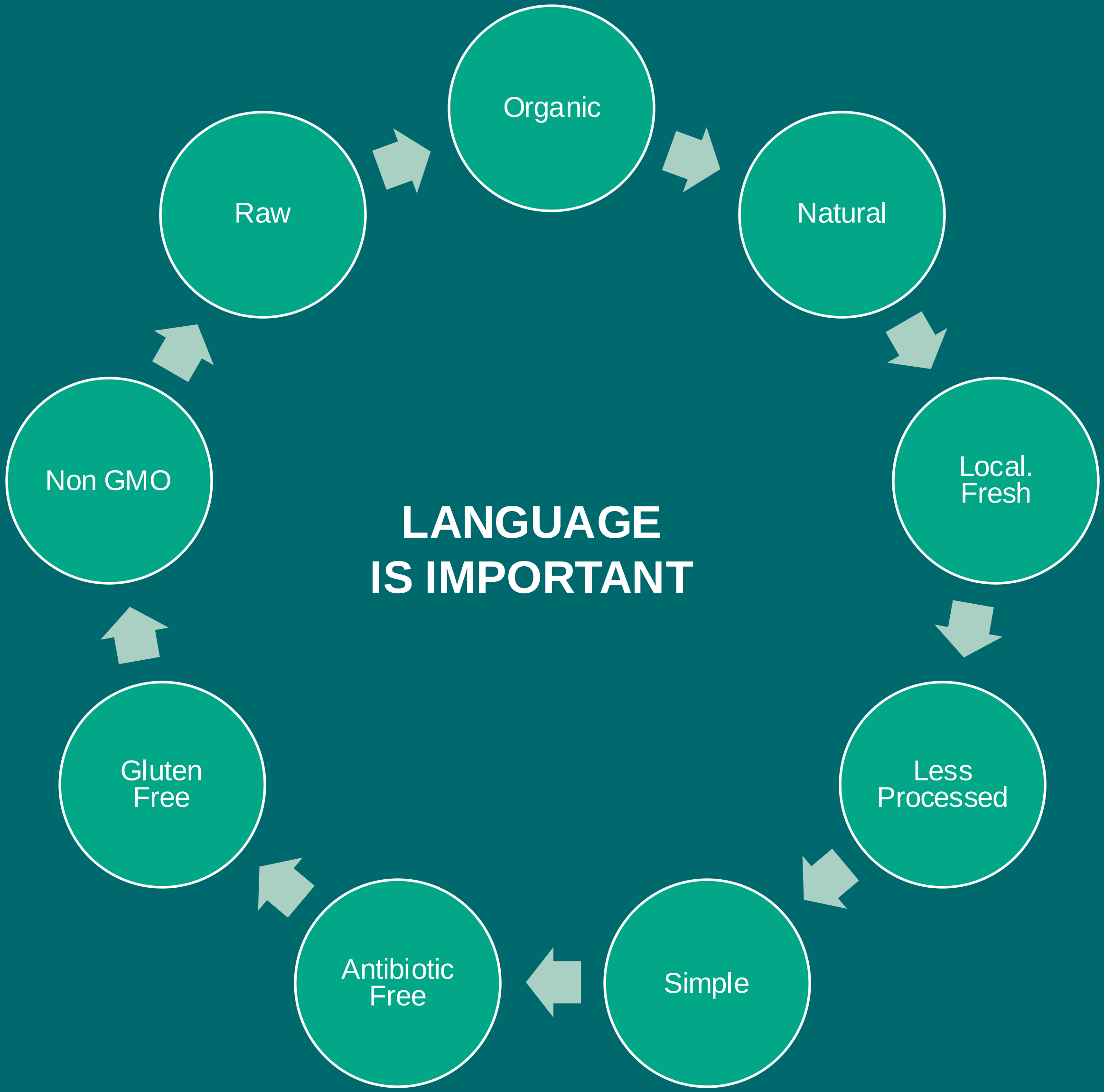
Proportion buying Organic Dairy products <u>at least half the time they buy dairy products</u>

48%
(+3%)

(2024 Sustainable Nutrition)

Natural and Clean can have many meanings and language is important for consumers

Natural Nutrition



"I need help in knowing how to make better nutritional choices"

% AGREE

45%

(+1)

(2024 Sustainable Nutrition)

Feeling Better is a key motivation in choosing to purchase healthier foods

Natural
Nutrition

Motivations for choosing healthier foods

"Eating this way makes me feel better"

43%
(+1)

This sentiment is quite consistent across all segment types.

(2024 Sustainable Nutrition)

Range of Factors acting as triggers to purchase healthier food choices

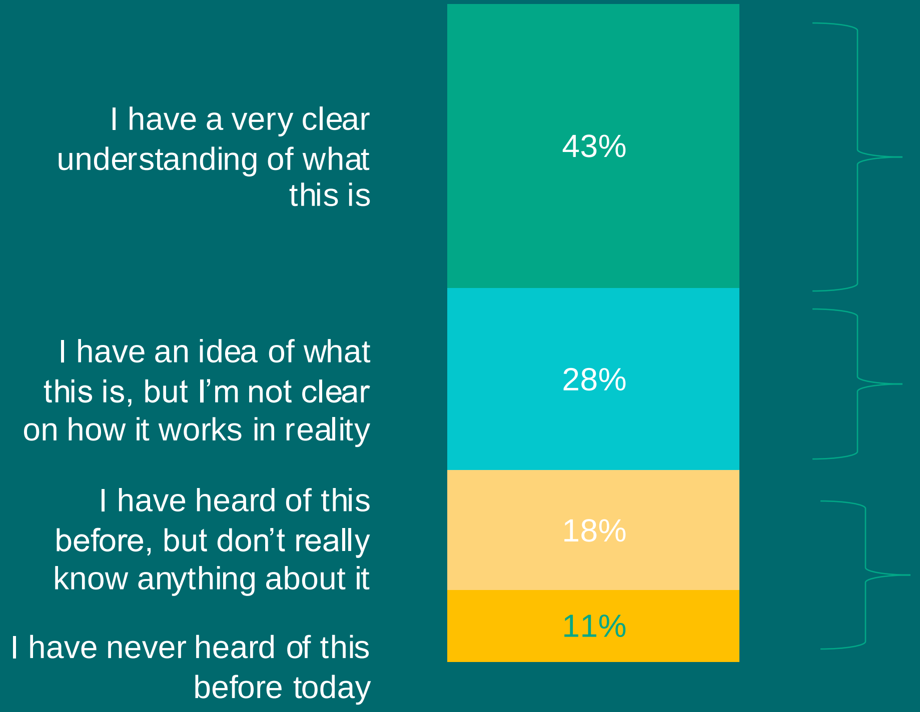
Natural Nutrition

MOTIVATIONS TO ACTIVELY MAKING HEALTHY FOOD CHOICES

UPF appear to be somewhat polarising currently, with a clear spread in awareness and comprehension evident.

Natural Nutrition

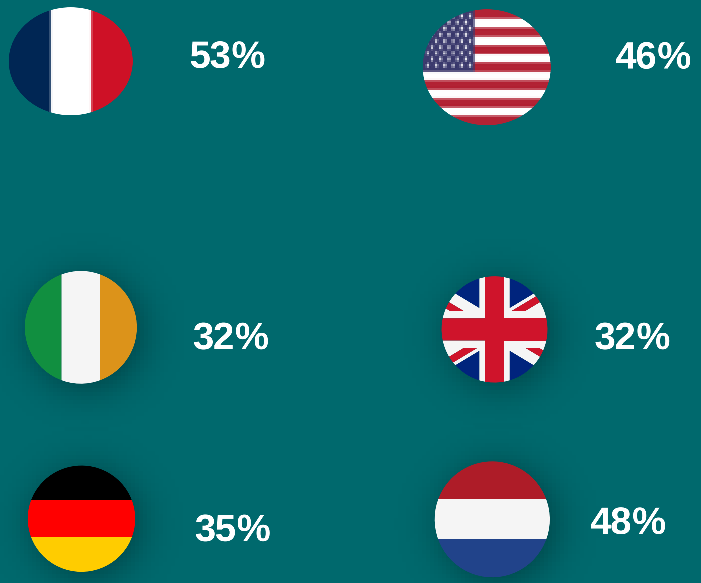
How well, if at all, would you say you understand what each of the following term means - Ultra Processed Foods



CLEAR & COMPREHEND – 43%

AWARE BUT NOT CLEAR – 28%

LOW LEVELS OF AWARENESS- 29%



Two in three of the Pro Active segment claim to have a very clear understanding of what the term Ultra Processed Foods means, with almost half of the disregarders exhibiting low levels of awareness.

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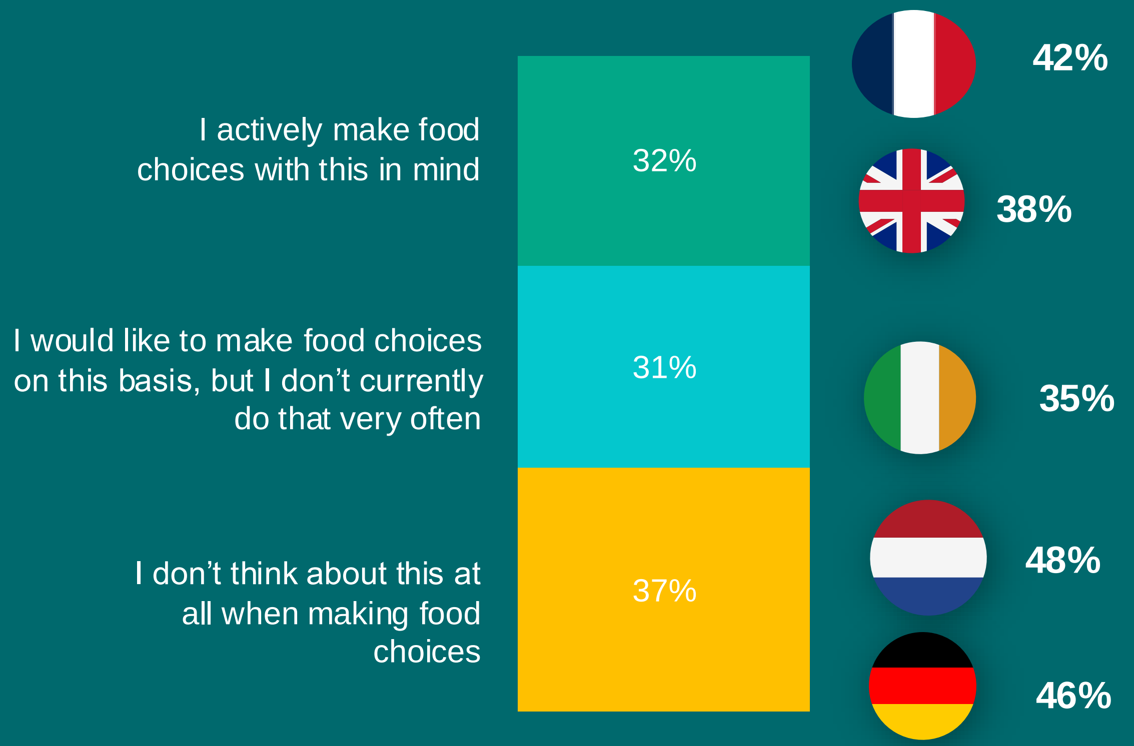
But it is making an impact on purchasing habits

Natural Nutrition

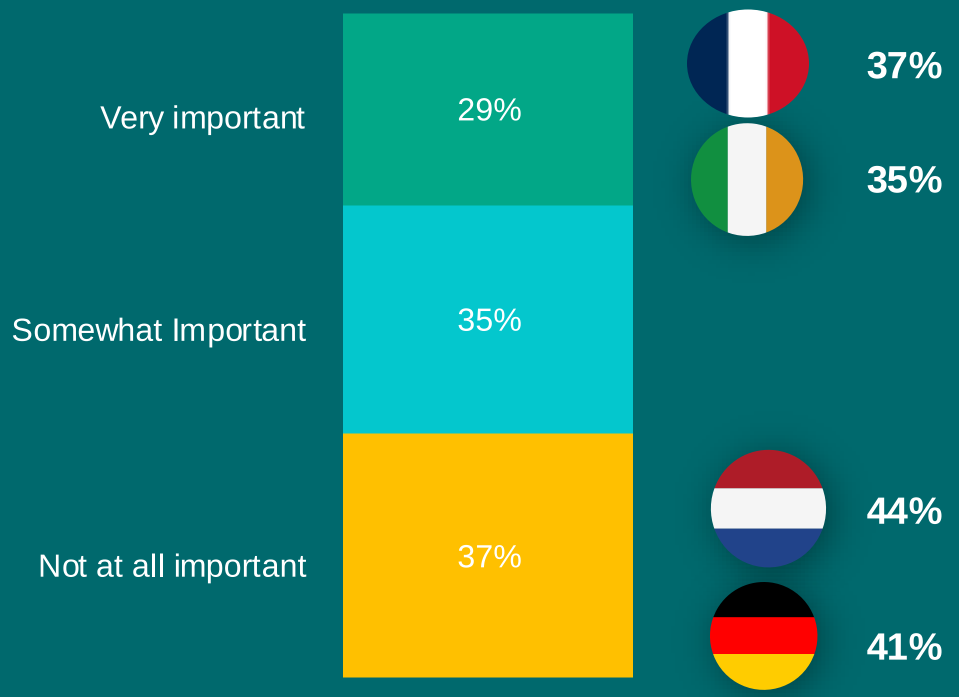
PERCEPTION OF FOODS BEING ULTRA PROCESSED

IMPACT ON PURCHASE BEHAVIOURS



Over half of Pro Active segment claim they actively make food choices with this in mind. Two thirds of Disregarders don't think about this when making food choices.

PERSONAL IMPORTANCE



Half of Pro Active segment claim this is important to them. 6 in 10 Disregarders claim it is not at all important.

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Key Implications for Dairy

Natural Nutrition

- ✓ **Clean Label & Transparency – Consumers are demanding simpler, more natural ingredients, with clear and honest packaging. Sustainable options are a clear part of this expectation. The language needs to be clear and understandable.**

- ✓ **Convenience & Natural Demands – Consumers still want quick and easy meal solutions, so finding ways to offer healthy, natural, and convenient products will be a key opportunity. Shelf-life is also a consideration here.**

- ✓ **The Ultra-Processed Food (UPF) Debate – Concerns about processed foods mean producers should be mindful of consumer perceptions and potential backlash, ensuring balanced messaging around nutrition and processing.**


Plant & Animal Protein
What's Emerging?
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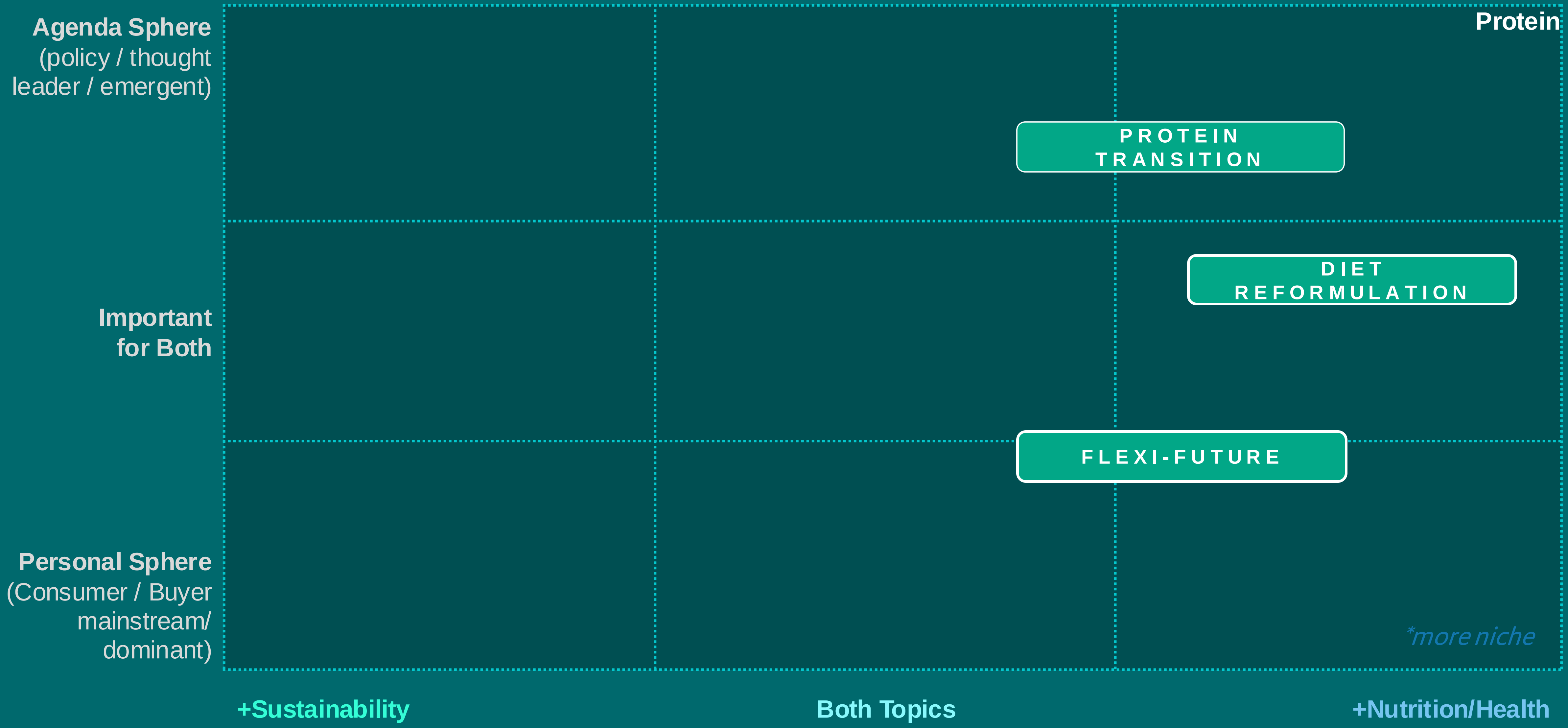
Theme : Plant & Animal Protein

Plant & Animal Protein

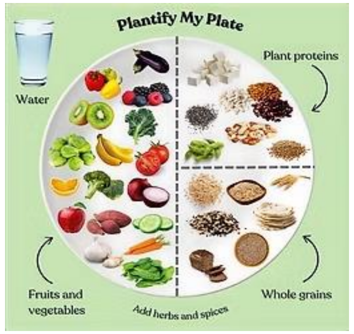


Theme : Plant & Animal Protein

Context: The search for protein continues to grow and now evolve with both plant & animal based options evolving and indeed blending!

(i) Protein w/ Benefits

- Protein continues in importance but now broadening to diversified sources & cultural heritage
- Focus on increasing protein expanding through day parts (beyond the breakfast bowl)
- 'Blended Plantification' & Flexitarianism to the fore over extreme or either/or diet solutions



- R&D utilising new tech to unlock novel protein

(ii) Plant

- While consumer uptake 'stalling' there is continued 'plant' innovations
- Trend towards whole plant & utilisation and more diversified plant protein sources
- Snackification/convenience opportunity to make plant proteins more accessible in key occasion

(iii) Animal

- Animal meat benefits from being seen as a high source of protein.
- 'Winning' protein solutions will also deliver on other holistic needs e.g. sustainability, clean-label / natural
- Added benefits meet need for additional health solutions (beyond just protein).

Plant & Animal Protein

Where is the Consumer?

Stalling momentum of plant based evident in terms of importance levels

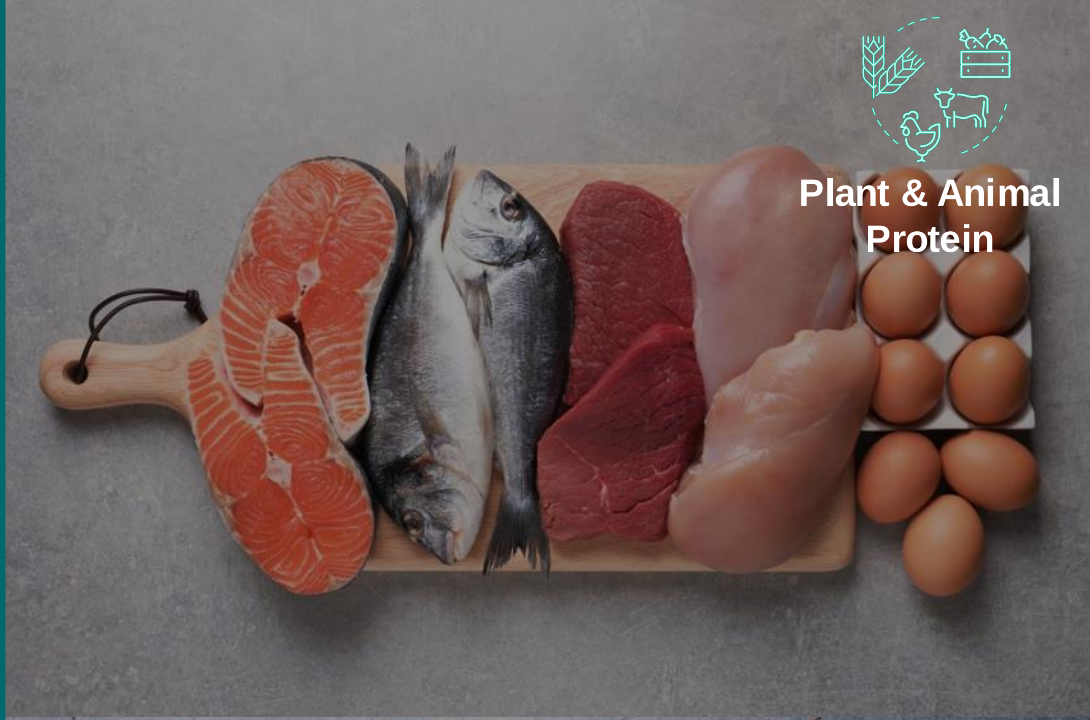
Becoming More Important

Plant based Foods

17%
(-2)

Being plant based

12%
(-2)



(2024 Sustainable Nutrition)

Similar behaviour also recorded in our Meat Market Shopper Monitor Research, with veg based proteins in negative growth year-on-year.

Plant & Animal Protein

Protein Purchase Behaviour over Past 12 Months – NET POSITION (CONSUMING MORE – CONSUMING LESS)

CHANGE FROM YTD Q4 2023 TO YTD Q4 2024

Chicken	1%	3%	1%	-6%	-2%	0%	-2%
Beef	1%	7%	-2%	0%	-2%	-1%	-1%
Pork	-3%	0%	-3%	-2%	-2%	-2%	-3%
Vegetable based protein	-2%	-1%	-6%	-3%	-4%	-3%	-4%
Fish	1%	4%	-3%	2%	0%	0%	0%
Turkey	2%	6%	2%	-4%	3%	2%	2%
Lamb	-1%	6%	1%	2%	0%	1%	0%
Shellfish	-3%	2%	1%	4%	-1%	4%	2%

(Base: All Grocery Shoppers)

Confusion and Comprehension challenges evident

Current barriers to you making more sustainable/healthier food choices

I don't understand what the benefits are for my health

13%
(+1)

Too much confusion / confusing messages as to what to choose

20%
(+2)

This sentiment is quite consistent across all segment types, with highest levels of confusion evident with Pro-Actives

Natural Dairy perceived to be better than plant in all aspects, but the gap is narrowing somewhat

2025
2024

PROPORTION WHO BELIEVE NATURAL DAIRY TO BE BETTER THAN PLANT BASED DAIRY ON EACH ASPECT

Key Implications for Dairy

Plant & Animal Protein

- ✓ **Protein Sources – Consumers are looking beyond traditional protein, so innovation in alternative, plant-based, and blended proteins will be important. Leveraging Ireland's strong dairy and meat industries while exploring newer proteins can be a growth opportunity.**

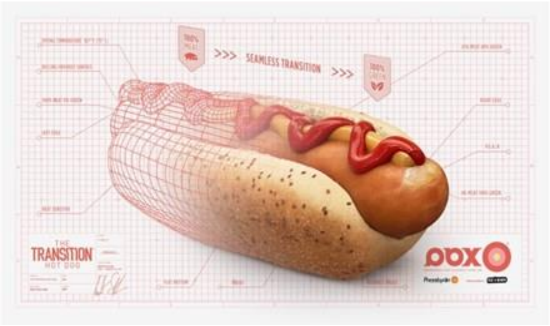
- ✓ **Balance Plant & Animal Demand – While plant-based protein is a strong trend, consumer reality shows animal protein remains dominant. Opportunity for sustainable, clean-label animal protein options which clearly identify the benefits.**

- ✓ **Prioritise Sustainability & Functional Benefits – Protein products need to go beyond just nutrition, incorporating sustainability, clean-label ingredients, and functional health benefits (e.g., gut health, immunity). Transparency in sourcing will be crucial.**

- ✓ **Innovate in Convenience & New Formats – "Snackification" and easy-to-consume formats (e.g., protein snacks, meal solutions, and ready-to-eat options) will make plant and animal proteins more accessible to modern consumers.**

Examples

Plant & Animal Protein



Swedish convenience store Pressbyrån launched a hotdog made from authentic meat at one end, meat plus plant-based proteins in the middle, and 100% plant-based ingredients at the other end. **Dubbed 'The Transition Dog**', it was designed to introduce meat-eaters to plant-based protein.

American start-up Both Burger's patties are half beef and half vegetable, promoted to retail buyers as a "category creator".

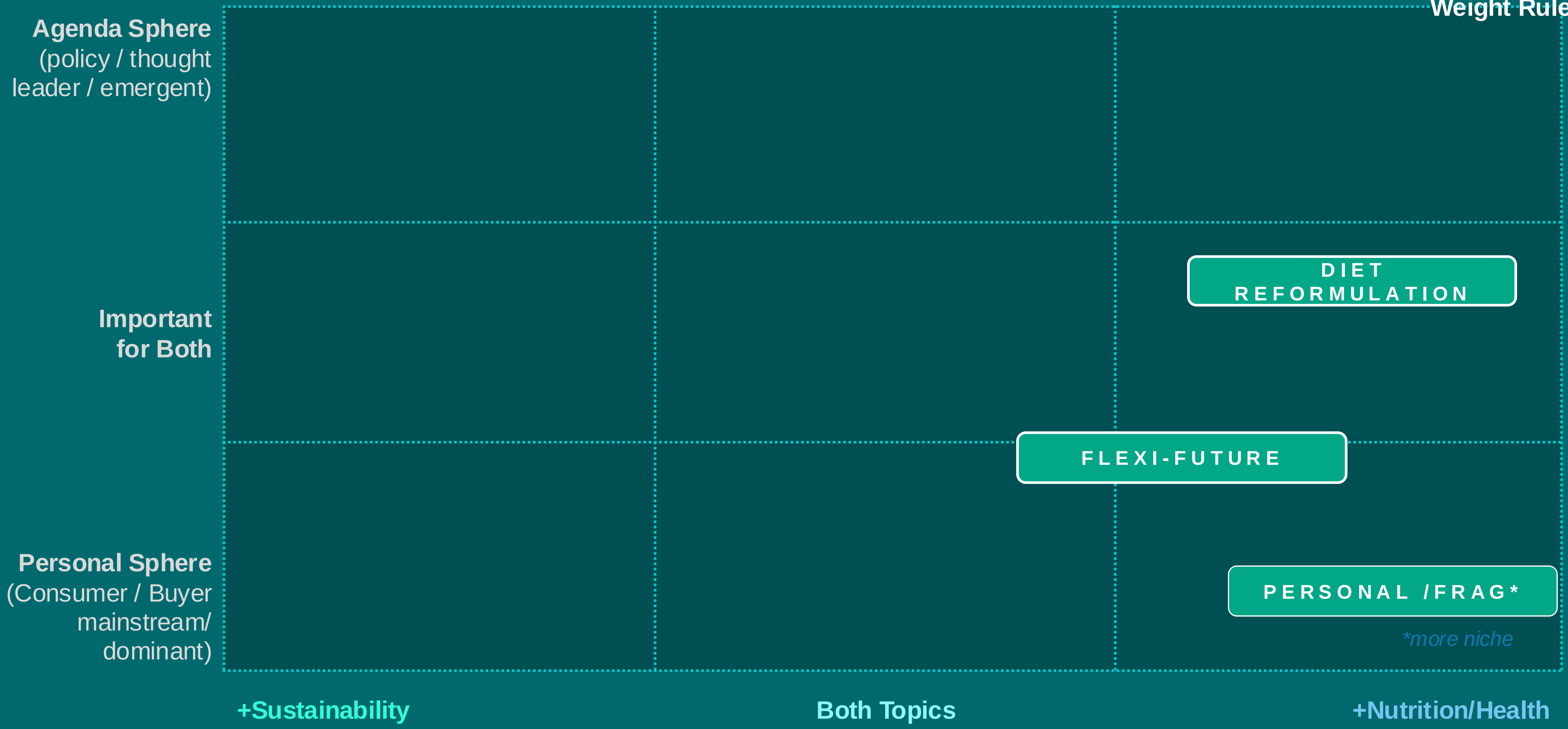
Woolworths Food Original Beef Biltong Snapsticks are said to be made the traditional way with specified grades of meat based on age and fattiness (South Africa). Biltong is a form of dried, cured meat originating from South Africa

The New Weight Rules

What’s Emerging?

Theme : New Weight Rules

The New Weight Rules



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Theme : New Weight Rules

The New Weight Rules

Context: In the areas of weight, diet and exercise (and more broadly health) the desires for increased personalisation and empowered analysis marry with technology solutions.
And, do GLP1's, in particular, usher in an era of 'science will solve it'?

(i) GLP1's (& similar)

- Rising usage of GLP1's with a growing portion open to usage - especially as more benefits identified.
- Given the scale of the coming societal healthcare challenge – could mass usage be on the way?

- GLP style drugs are now impacting adjacent industries like F&B and health industry (gym's etc…)

(ii) Personalised Diets

- New analysis technologies – genetic screening, microbiome, blood biomarkers etc… is allowing deeper more personalised analysis of health issues or risks
- This is driving tailored & personalised diet / exercise regimes

(iii) Target Functions

- As with other themes – personalisation/customisation and health issue specificity is very much present in the range 'topics' addresses e.g. *(non exhaustive list)*
- *Protein*
- *Anti-inflammatory*
- *Gut health (multiple strands)*
- *Strength (for longevity heath-span)*
- *Recovery / low impact exercise*
- *Mental health*

Theme : New Weight Rules

The New Weight Rules

"The battle between biology and willpower has defined human eating habits for millennia. Our brains are wired to crave calories, making it incredibly difficult to change how we eat, no matter how much nutrition science or willpower-based dieting tries to intervene. But GLP-1 drugs, such as Ozempic and Wegovy, are changing the rules of the game"

Mary Shelman, women in agribusiness

New Weight Rules

Where is the Consumer?

Health and Exercise coming even more into focus

The New Weight Rules

27% making a **Big Effort** to exercise more than they were 12 months ago (consistent across all markets)

34% making a **Big Effort** to walk more

37% **39%**

With 29% making a big effort to eat more healthily

And 14% making a big effort to travel more by bike

23% **19%**

Pro-Actives & Well Intended more likely to be making a Big Effort across all of these aspects

Body functionality vs weight loss

The New Weight Rules

Motivations in actively making food choices which are health focussed

49%
(+2)

Ensuring the body can function properly is increasing as a motivation to making healthy food choices

More evident with Majority Followers and Disregarders.

Pro-Actives more likely to be motivated by this

39%
(+2)

As is the recognition that it is best way to eat from a nutritional perspective

Lower in

31%
(-3)

With less of a focus in doing so to reduce/ lose weight

Dairy aligns strongly to health goals, acting as a strong motivator.

ASPECTS OF IMPORTANCE WHEN IT COMES TO PURCHASE DECISIONS IN DAIRY

The nutritional value of the product

30%
(+1%)

Ranked 3rd Overall

How positively it impacts your health

28%
(=)

Ranked 4th Overall

How well it meets your overall nutritional needs

24%
(-1%)

Ranked 5th Overall

MOTIVATIONS TO PURCHASE DAIRY PRODUCTS

How good the product is for your health

29%
(-1%)

Ranked 5th Overall

Ability of the product to meet your nutritional needs

20%
(=)

Ranked 7th Overall

(2024 Sustainable Nutrition)

Small minority currently using weight loss medicines, with 16% open to trying in the future

The New Weight Rules

9% claim to be currently taking a weight-loss medicine.

15% claim to have taken one in the past but don't do currently.

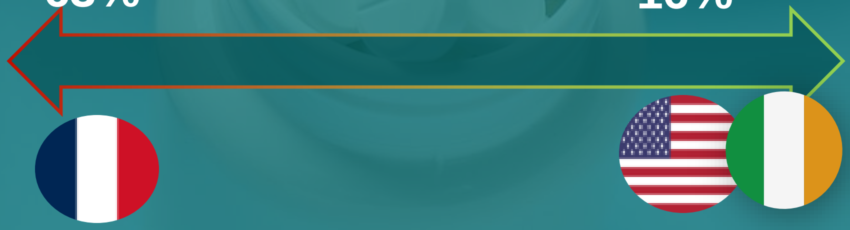
Both higher in the US

Not at all open to taking in the future

Very/Quite open to taking in the future

63%

16%



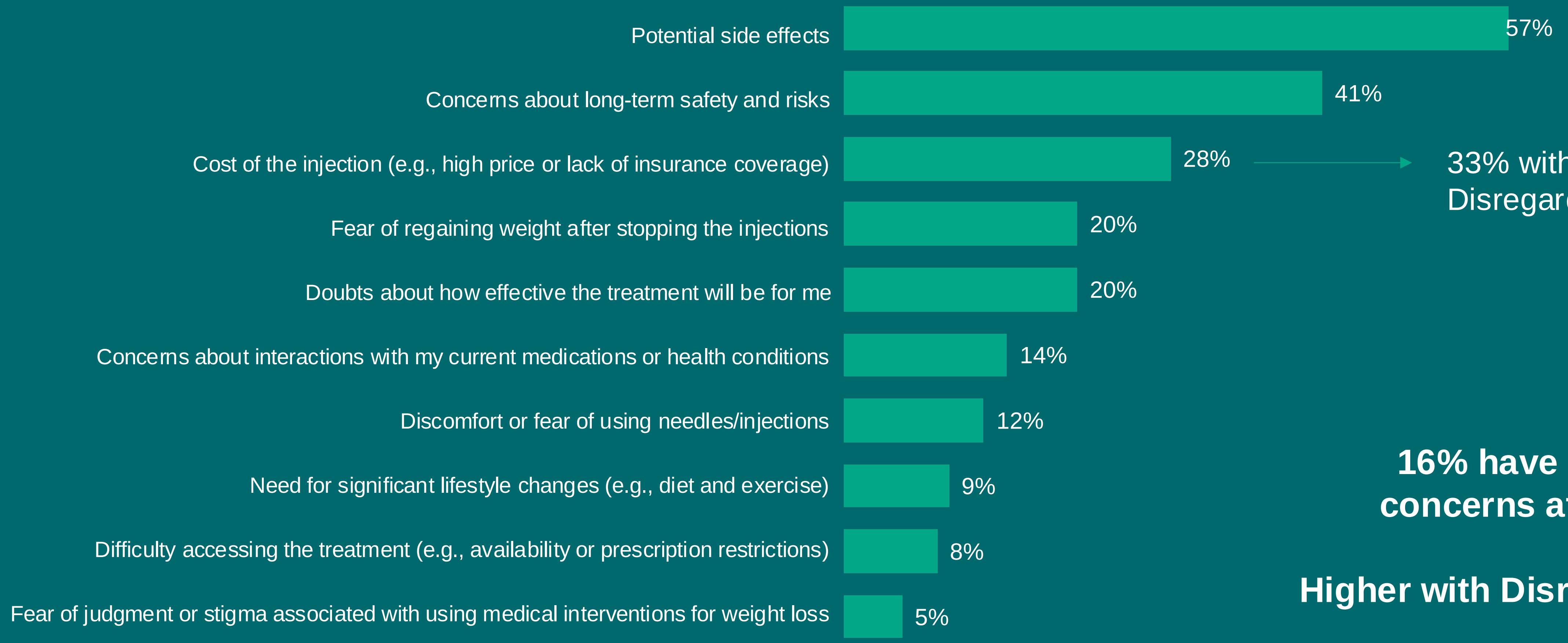
Pro-Actives more open to trying in the future

Amongst those using weight loss medicines, there have been clear impacts on consumption behaviours

- ✓ 37% claim to feel less hungry through the day.
- ✓ 30% of those currently taking claim they are eating less than before.
- ✓ 22% claiming they are eating the same as before.
- ✓ 14% claim they are eating healthier.
- ✓ 12% eating more than before.

Side-effects and concerns about long-term safety and risks are the key barriers/concerns, with cost ranking 3rd highest.

BARRIERS/CONCERNS TO TRYING WEIGHT LOSS INJECTIONS



33% with Disregarders

16% have no concerns at all!

Higher with Disregarders

Key Implications for Dairy

New Weight Rules

- ✓ **Holistic Health Approach – Weight management is evolving beyond calories to include mental well-being, strength, and overall wellness. Focus on wider benefits rather than specifically on one thing.**

- ✓ **Demand for Functional Foods – Increased focus on gut health, inflammation, recovery, and longevity is driving demand for targeted nutrition.**

- ✓ **Personalised Nutrition – Some consumers are embracing more genetic and biomarker-driven diets, creating opportunities for tailored food solutions.**

- ✓ **GLP-1 Impact on Food Consumption – Rising use of GLP-1s is shifting demand towards portion-controlled, nutrient-dense meals and their rise may have wider implications for how food is consumed.**

Examples

New Weight Rules

Incentivising Vitality: London-based chicken shop **Morley's** partnered with local gym chain **Gymbox** to offer customers day passes to the gym via Willy Wonka-style surprise tickets in select takeaway boxes.

Chipotle (US) partnered with US-headquartered fitness tool **Strava** to enable athletes to win free Lifestyle Bowls for a year plus smaller prizes (like a side of guacamole) as rewards for logging movement-based activities – such as running – with Strava.

Nestlé builds brand for GLP-1 users
Nestlé introduced Vital Pursuits ready meals that are high in protein, have essential nutrients and are portion-controlled. The meals target GLP-1 users, but are also targeted for anyone managing weight (US)

(Stylus, 2024)

Examples

New Weight Rules

Danone recently reported a 4.2 percent volume increase in Q4 2024, driven by strong momentum in North America, particularly in high-protein categories, which may be an early indicator of GLP-1's impact on the market.

Personalisation and AI

What’s Emerging?

Theme : Personalisation & AI

Personalisation and AI

	+Sustainability	Both Topics	+Nutrition/Health
Agenda Sphere (policy / thought leader / emergent)			
Important for Both			
Personal Sphere (Consumer / Buyer mainstream/ dominant)			BOOST/ENHANCE * PERSONAL /FRAG* *more niche

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Theme : Personalisation & AI

Personalisation and AI

Context: Broader societal shifts around fragmentation, specificity of needs and empowerment of the person/patient (in health category) is matched by growing ability of technology to deliver on these demands

(i) AI & Agent Diets

- Growing utilisation of AI for diet and healthy eating recipes & planning.
- Emergence of virtual AI 'Health Agents' in the care space.

- Tailoring through technology to aid shopping and product criteria matching (for health etc…)

(ii) Real Time Specific

- Growth in wearables that are now increasingly specific and allow real time monitoring & reaction.
- Innovation in multiple F&B and supplements that mirror latest, specific functional requirements and trend …note: innovation in format to best fit functional need e.g. spray

(iii) AI & Smart Tech

- Cost, complexity to use and confusion are often cited as the main barriers to a healthy diet
- CES25 saw multiple Kitchen tech solutions focusing on the utilities of space and multi-functionality
- AI App integration also coming to the fore allowing ease of access to healthy & nutrition ingredients and recipes

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Personalisation and AI

Where is the Consumer?

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Decline in the proportion who think technology is helping me learn more about how to eat well – potentially too many messages.

Personalisation and AI

'I think technology is helping me learn more about how to eat well.

% AGREE

44%
(-4) ↓

Pro-Actives & Well Intended more likely to agree

However, there is significant levels of weekly+ usage of Tech/AI for food related tasks/information

57%

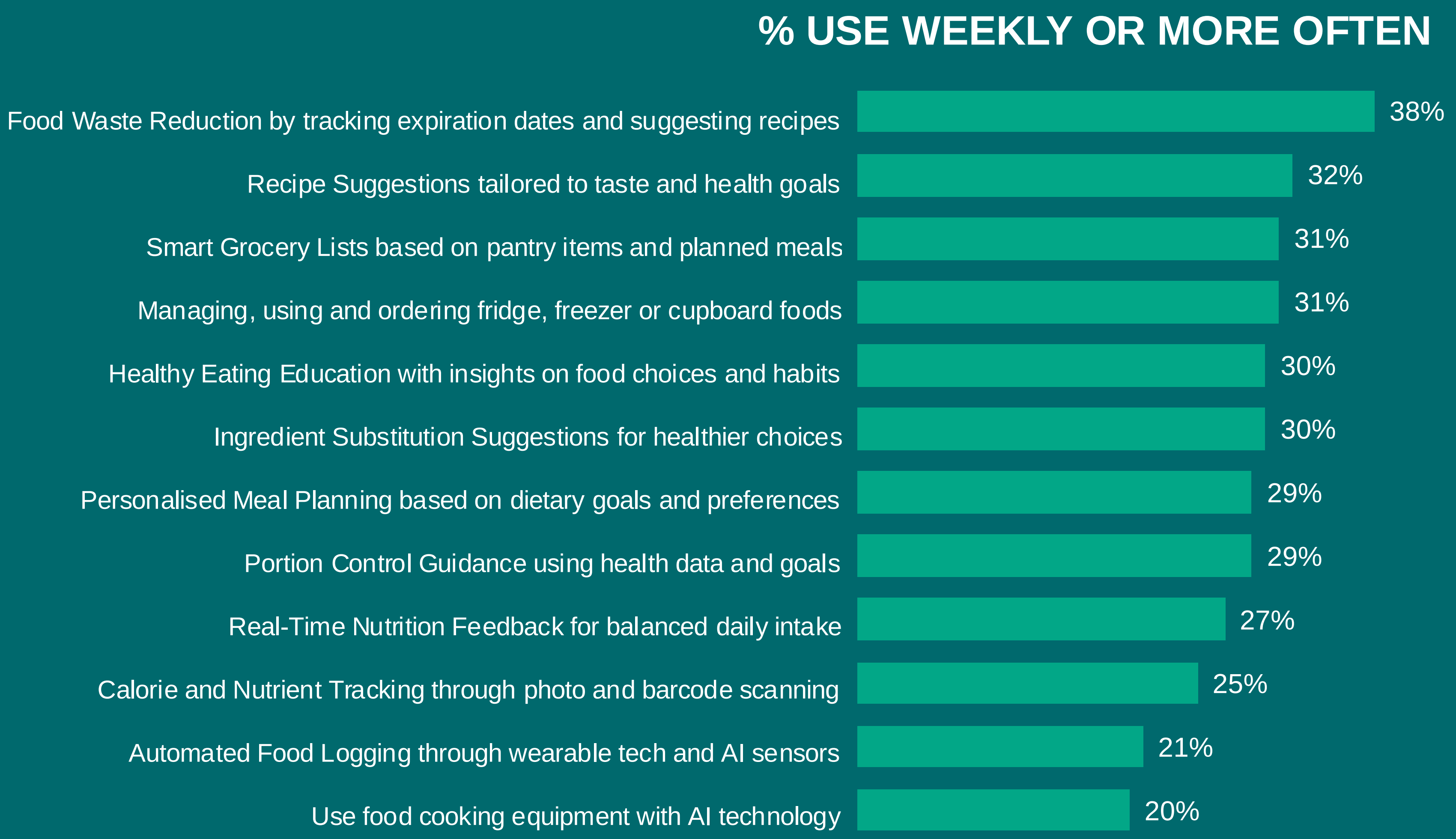
Using AI weekly or more often, with usage levels quite consistent across markets

83% for Pro-Actives & 67% Well Intended.
Just 27% for Disregarders.

(2024 Sustainable Nutrition)

Food waste reduction, recipe suggestions and smart ordering all to the fore in terms of weekly+ usage levels.

Personalisation and AI



Those using in the US more likely to be doing so for smart grocery lists, healthy eating education, ingredient substitution, portion control guidance and real-time nutrition feedback

Key Implications for Dairy

Personalisation and AI

- ✓ **AI-Driven Personalisation – The rise of AI in diet planning and health-focused shopping means Irish producers can also explore AI-driven personalisation, offering tailored nutrition solutions and smart product recommendations.**

- ✓ **Real-Time Functional Nutrition – Growth in wearable health tech creates demand for food and supplements that align with specific, real-time health needs. Opportunity to innovate in format and function to match this trend.**

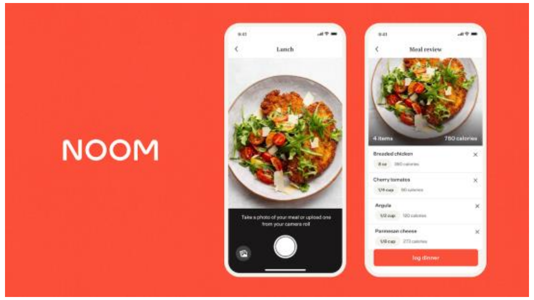
- ✓ **Smart Kitchen & AI Integration – As smart kitchen tech advances, products that integrate with AI-driven meal planning and cooking solutions will gain traction. Ease of use and convenience are key.**

- ✓ **Bridging Cost & Complexity – While AI and smart tech improve personalisation, cost and complexity remain barriers for many consumers. Irish brands should focus on making these innovations accessible and user-friendly.**

Examples

Personalisation and AI

Whisk (Owned by Samsung)
Uses AI to analyze user preferences, dietary restrictions, and shopping habits. Allows users to save recipes and automatically generates grocery lists. Syncs with smart fridges to suggest meals based on available ingredients.



Noom & AI Nutrition Coaching
While focused on weight loss, Noom integrates AI for personalized meal planning.AI suggests meals based on caloric intake, nutritional goals, and behavior patterns

Examples

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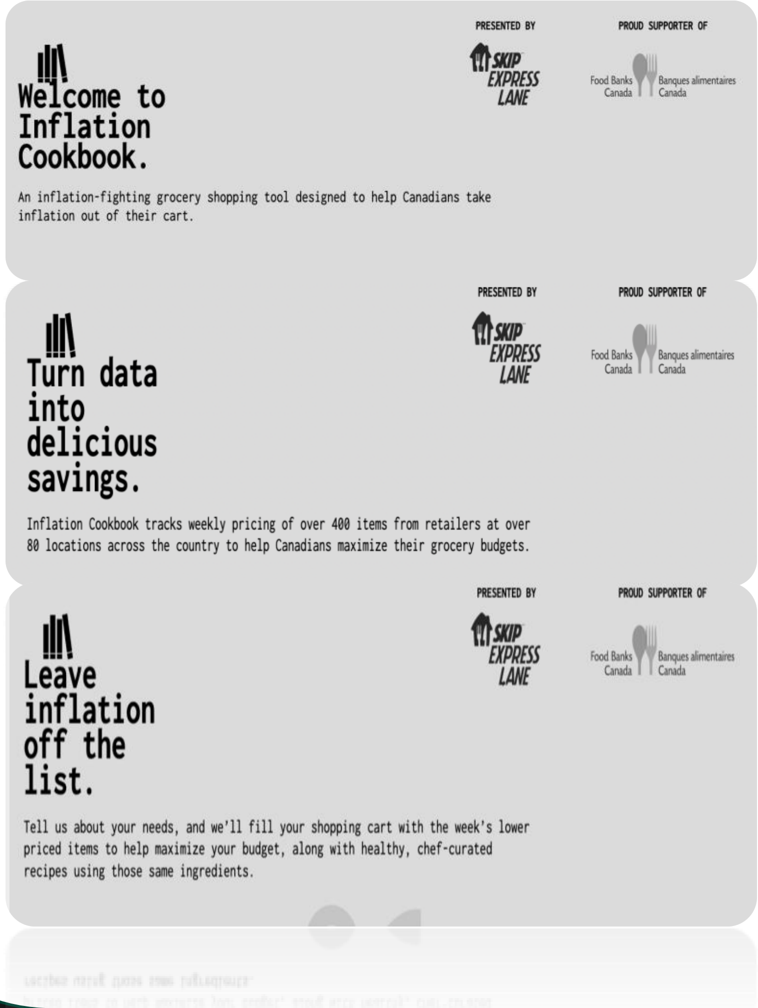

The "Inflation Cookbook" in Canada, an AI-powered tool that analyzes real-time grocery prices of 400+ ingredients across multiple retailers to uncover the biggest price drops of the week and then generates chef-inspired, nutritionist-vetted recipes that help consumers optimize their grocery budget.

Thank You


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