Growing the success of Irish food & horticulture
Vegetarianism has its roots in ancient India and Greece.

Much of the dietary lifestyles as we know them have been around for thousands of years.
Mid 19th Century saw many advocates and champions in England
Veganism

First Vegan Cookbook
Published in 1910
Fads to new norms....
The rise of veganism: We are what we eat

From niche to mainstream...

The rise of veganism in Ireland

The rise of veganism has led the rise and rise

Forbes

Number of vegans in the world

3.5 million survey finds

Move of the moment: Flexitarianism

Flexitarian diet key to feeding people in a warming world

THE IRISH TIMES

THE IRISH TIMES

THE IRISH TIMES
Sales of plant based food in the US went up by 20% during the past year topping $3.3 billion (Nielsen, 2018)

The global meat substitutes market is expected to garner a revenue of 6.43 bn USD by 2023 (Markets and Markets, 2018)

Seven of the 15 most well funded food and beverage start ups are plant based (CBINSIGHTS, 2017)

Vegan butcher was named a top new job trend for 2017 (Bahler, 2018)
“The number of vegans in the past four years has quadrupled to about 600,000 according to the Vegan Society.”

(Mance, 2018)

“The concept has mushroomed from a militant minority to an estimated 3.5 million in the UK today”

(O’Reilly, 2018)
This study sets out to explore these changing eating habits and new dietary lifestyles with a view to identifying opportunities for the food, drink and horticulture industries.
Our Research Partners
Five phases of Research

Desk Research

International Online Community
16 Days, 35 people
5 countries
All following dietary lifestyle

N=16 In-Depth Interviews
Nutrition, Health, Retail, Consumers

Online Survey
N=9,000 interviews
IRL, US, UK, SW, DE
The Consumer Lifestyle Trends represent the biggest trends shaping people’s lives over the next 3-5 years. By keeping up with trends and understanding what’s coming next, the programme helps companies within the food & drink industry in Ireland to better prepare for the future needs and desires of their consumers.

Consumers want moments of discovery and delight that enhance their day, sharing exciting stories and spaces with others.

Consumers want to eat, drink and live to optimise their body’s systems, to feel better than well today and tomorrow.

Consumers want to use their time to be as productive and sociable as possible, flowing from one thing to the next - and want to be helped, not hindered, by tech.

Consumers want to have a positive impact on society and the environment, and take pride in a sustainable way of living.

Consumers want to express the views and values of themselves and their community, and have their uniqueness and creativity respected and celebrated.

(Bord Bia, 2018)
I want moments of discovery and delight that enhance my day, sharing exciting stories and spaces with others...
I want to have a positive impact on my society and the environment, and take pride in that sustainable way of living...
WHAT'S DRIVING THE TREND?:

Drivers

HOW IS IT MANIFESTING?:

Sub-Trends

Supply Chain Laid Bare

Consumers will expect brands to operate ethically and have a net positive impact within their supply chain. Increasingly powerful and accurate technologies will provide proof of this from independent sources.

Innovating against waste

War on waste takes on new life and meaning as cutting edge innovation helps environmentally friendly alternatives hit the mainstream.

Local Action

With global longevity increasing and changing population status quo, consumer and government focus on taking proactive measures to live better, not just longer intensifies.

Eco Status

Consumer behaviour is fundamentally reshaped by a new wave of sustainable brands that are premium in look and feel, and are markers of status.

Increasing Environmental Pressure

120 million more hectares of natural habitat need to be converted to farmland to meet demand for food by 2050.

1

Rise of Protectionism and Nationalism

From January 2018 China has banned imports of plastic waste from other countries.

2

Rapid Urbanisation

Cities are responsible for 67% of the total global energy consumption and more than 70% of greenhouse gas emissions.

Eco Status

Local Action
I want to eat, drink and live to optimise my body’s systems, to feel better than well today and tomorrow…
Rediscovering natural

Engineering goodness
I want to express the views and values of myself and my community, and have that uniqueness and creativity respected and celebrated…
WHAT'S DRIVING THE TREND?:

DRIVERS

HOW IS IT MANIFESTING?:

SUB-

TRENDS

Identity Spectrums

Access & Involvement
..means, motives and opportunity
Trends around new diets have been rising steadily since 2012...in a similar trajectory to Instagram.

---

"Veganism has got the Instagram generation"
Shane Holland
Slow Food, UK
FOOD BUT NOT AS WE KNOW IT

Opportunity: social

A new food era
A new food era
Always on & Speedful

According to our GM
58% of people are always on versus 49% in 2015

Opportunity: social
Opportunity: social

The power of Peer to peer
"I would make a massive pot of a slow cooked tomato sauce and I can give that to many different things in many different guises so you do have to plan but once you get into that planning it is less complicated than it might appear to be."

Mother of teenage girl
Means, motives and opportunity
Means

- Knowledge
- Choice & Convenience
- Greater Prosperity & Investment
- Better Quality
New ways to cook and to experiment
Means:
Prosperity & Investment
“Big chains such as M&S and Pret have introduced vegan ranges

Pizza Hut and Pizza Express offer vegan pizzas

Holland and Barrett are to open Vegan only stores

Beyond falafel and fruit salad
Means:
Better Quality

Derek Sarno: The new Tesco American chef – director of plant based innovation
Evolving Lifestyles…
Evolving Food Choices
63% claim to have made some effort to eat more healthily in the past year.

60% have made some effort to exercise more in the past year.

Change is inevitable. Change is constant.

Benjamin Disraeli
63% claim to have made **SOME** effort to **eat more healthily** in the past year.

60% have made a **SOME** effort to **exercise more** in the past year.

The Thinking House
Changes Made in the Past 12 Months

Eat more Healthily

- 69% Effort TOTAL
- 62%
- 73%
- 68%

Exercise More

- 60% Effort TOTAL
- 64%
- 67%
- 58%
- 56%
- 60%
92% indicate that they would like to make a change to improve their health and wellbeing. The most common change that people would like to make is to be more physically active (40%), followed by being more financially secure (31%), sleeping better (30%) and eating more healthily (29%).

(Healthy Ireland, 2016)
22% of People claim to be following a specific dietary regime
19% of People claim to be following a diet that has a greater emphasis on **plant-power**.
Plant-Powered Diets operate on a spectrum

- Lifestyle Vegans
- Dietary Vegans
- Ethical Vegans
- Vegetarians
- Re-Balancers
  - Pescatarian
  - Pollotarian
  - Ovotarian
61% have made some effort to reduce their use of plastic in the past year
1 in 3 claim to have reduced their intake of Red Meat
22% claim to have reduced their intake of Dairy.

**WHY?**

- Health 56%
- Lifestyle Change 31%
  - To Look Better 16%
  - Animal Welfare 16%
  - Have More Energy 16%
  - Doctor/Prof. Advice 15%
  - Environment 14%
Conscious Reduction?

Q. And for each of these types of food that you have reduced, did you consciously try to reduce this food or did it simply happen that way due to other influences or circumstances?

Red Meat (N=3,028)
- 76% of the total
- 25% of the total
  Across the markets

Dairy (N=1,943)
- 73% of the total
- 16% of the total
  Across the markets

Q. And for each of these types of food that you have reduced, did you consciously try to reduce this food or did it simply happen that way due to other influences or circumstances?
LESS BUT BETTER?
<table>
<thead>
<tr>
<th>Country</th>
<th>Value</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>4.6%</td>
<td>5.9%</td>
</tr>
<tr>
<td>UK</td>
<td>2.0%</td>
<td>0.6%</td>
</tr>
<tr>
<td>US</td>
<td>2.6%</td>
<td>4.0%</td>
</tr>
<tr>
<td>Sweden</td>
<td>4.2%*</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td>4.3%</td>
<td>1.8%</td>
</tr>
</tbody>
</table>

*(GlobalData, 2018)*
Milk & Milk Alternatives (Value)

<table>
<thead>
<tr>
<th>Country</th>
<th>Milk</th>
<th>Milk Alternatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>3%</td>
<td>19%</td>
</tr>
<tr>
<td>UK</td>
<td>-0.7%</td>
<td>7.2%</td>
</tr>
<tr>
<td>US</td>
<td>2%</td>
<td>13%</td>
</tr>
<tr>
<td>Sweden</td>
<td>2%</td>
<td>15%</td>
</tr>
<tr>
<td>Germany</td>
<td>1%</td>
<td>15%</td>
</tr>
</tbody>
</table>

(Euromonitor, 2018)
<table>
<thead>
<tr>
<th>Country</th>
<th>Vol</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>UK</td>
<td>1.0%</td>
<td>3%</td>
</tr>
<tr>
<td>US</td>
<td>0.2%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Sweden</td>
<td>1.5%</td>
<td>4%</td>
</tr>
<tr>
<td>Germany</td>
<td>1%</td>
<td>2%</td>
</tr>
</tbody>
</table>

(Euromonitor, 2018)
Dietary Lifestyles
- Plant Powered Diets -
Veganism

Eat no animal products whatsoever (no meat, seafood, dairy, eggs or honey)
Dietary Vegans

In their own words

• physically active, driven and conscious of all that is around them.

"I'm best described as an active person who is focussed and career orientated" - Vegan, Sweden

"Very active, Hard worker, Constant, Achiever" - Vegan, USA

"A few words to describe myself: Compassionate, conscious, honest, active and determined" - Vegan, UK

"I don't practice any diet, but I'm vegan, which is better described as a lifestyle. I've been vegan for three years now and I regret not doing it sooner. Just to avoid confusion, vegan means that not only do I not consume animal products in any way, shape or form, but I also don't use or buy anything that is made from or has animal products in them. It is not only about bettering myself, but also the world around me" - Vegan, Sweden
Veganism

3.5%
NEW RECRUITS
- Up to 12 Months -

Dietary Vegans

IRL 50%  UK 34%
DE 35%   SW 26%
US 47%

COMMITMENT
- Committed forever-

IRL 37%  UK 44%
DE 31%   SW 46%
US 46%
VEGAN-ISH

BEEFROOT BURGER

HOLLY WHITE
Dietary Vegans

- **4.1%** in Ireland: 146,426 adults
- **3.6%** in the UK: 1,855,023 adults
- **2.8%** in Sweden: 178,360 adults
- **2.6%** in Germany: 1,800,500 adults
- **5.0%** in the USA: 12,603,190 adults
Vegan is the third fastest growing on-pack claim for food & drink launches globally over the last five years.

The rise of plant-based foods is highlighted by growing use of the dairy-free claim alongside vegan claims over the last five years.

Global: fastest growing claims for food & drink NPD (indexed), 2013-18

(Mintel: GNPD, 2018)
Snack category accounts for the highest share of vegan food & drink launches

Snacks account for the largest share of vegan NPD: 19%

Sauces & seasonings is in second place at: 11%

Vegan bakery, in third place, includes dairy- and egg-free cakes.

NPD in plant-based dairy has advanced to such an extent that dairy is now the fourth largest contributor to vegan NPD.

(Mintel : GNPD, 2018)
Vegetarians - Plant Powered Diets -
Vegetarians

No products consisting of or created from the body of an animal
Vegetarians

5.1%
<table>
<thead>
<tr>
<th>Vegetarians</th>
<th>Percentage</th>
<th>Adults</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4.3%</td>
<td>153,569</td>
</tr>
<tr>
<td></td>
<td>5.7%</td>
<td>2,937,120</td>
</tr>
<tr>
<td></td>
<td>4.7%</td>
<td>338,571</td>
</tr>
<tr>
<td></td>
<td>6.1%</td>
<td>3,254,750</td>
</tr>
<tr>
<td></td>
<td>4.3%</td>
<td>10,838,743</td>
</tr>
</tbody>
</table>
Vegetarians

NEW RECRUITS
- Up to 12 Months -

- IRL 32%
- DE 21%
- SW 24%
- US 40%

27%

COMMITMENT
- Committed forever-

- IRL 40%
- UK 56%
- DE 39%
- SW 42%
- US 42%

45%
Re-balancers 10.6%
Re-Balancers

Include some meat and/or dairy but in a fairly limited fashion with an effort made to reduce meat and/or dairy.
Re-Balancers

*In their own word*

- They have more of a flexible and less extreme approach

  “It would definitely be exuberant, passionate and funny. I love making others laugh and I really care about everything that I do. When I do something, I really set my mind to achieve it”
  - Rebalancer, USA

  “I’m not very active because I don’t enjoy exercise, but I’m trying to improve and start yoga. I try to go to the gym and run for 20 minutes once a week, but it doesn’t always happen.”
  - Rebalancer, UK

  “Happy, empathetic, analytic and balanced”
  - Rebalancer, Sweden

  “Outgoing / Sociable / Determined”
  - Rebalancer, Ireland
Re-balancers

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
<th>Number of Adults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>8.2%</td>
<td>295,852 adults</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>7.9%</td>
<td>4,070,745 adults</td>
</tr>
<tr>
<td>Sweden</td>
<td>12.7%</td>
<td>808,990 adults</td>
</tr>
<tr>
<td>Germany</td>
<td>14.5%</td>
<td>10,041,250 adults</td>
</tr>
<tr>
<td>United States</td>
<td>8.4%</td>
<td>21,173,359 adults</td>
</tr>
</tbody>
</table>
Veganism / Vegetarianism / Re-balancers

19.1%
Who are they?
Plant-powered dietary lifestyles are more prevalent among younger generations...

- Vegans: 3.5%
- Vegetarians: 5.1%
- Re-Balancers: 10.6%
- Non-Subscribers: 80.8%

- % Aged 18-34:
  - Vegans: 54%
  - Vegetarians: 48%
  - Re-Balancers: 31%
  - Non-Subscribers: 24%
... And they are more prevalent among the higher social grades

<table>
<thead>
<tr>
<th>Vegans</th>
<th>Vegetarians</th>
<th>Re-Balancers</th>
<th>Non Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>3.5%</td>
<td>5.1%</td>
<td>10.6%</td>
<td>80.8%</td>
</tr>
</tbody>
</table>

% ABC1

- Vegans: 65%
- Vegetarians: 64%
- Re-Balancers: 60%
- Non Subscribers: 53%
... And more urban focused

<table>
<thead>
<tr>
<th></th>
<th>Vegans</th>
<th>Vegetarians</th>
<th>Re-Balancers</th>
<th>Non Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>% Urban</td>
<td>87%</td>
<td>83%</td>
<td>81%</td>
<td>79%</td>
</tr>
</tbody>
</table>

3.5% Vegans
5.1% Vegetarians
10.6% Re-Balancers
80.8% Non Subscribers

Vegans
Vegetarians
Re-Balancers
Non Subscribers
... And more Gen Z than Gen X

<table>
<thead>
<tr>
<th>Generation</th>
<th>Vegans</th>
<th>Vegetarians</th>
<th>Re-Balancers</th>
<th>Non Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Golden Age [Age 66+]</td>
<td>5%</td>
<td>8%</td>
<td>16%</td>
<td>17%</td>
</tr>
<tr>
<td>Boomer [Age 52-65]</td>
<td>14%</td>
<td>19%</td>
<td>28%</td>
<td>28%</td>
</tr>
<tr>
<td>Generation X [Age 38 and 51]</td>
<td>24%</td>
<td>20%</td>
<td>21%</td>
<td>26%</td>
</tr>
<tr>
<td>Older Millennials [Age 30-37]</td>
<td>21%</td>
<td>21%</td>
<td>14%</td>
<td>13%</td>
</tr>
<tr>
<td>Young Millennials [Age 22-29]</td>
<td>25%</td>
<td>23%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Generation Z [Age 18-21]</td>
<td>12%</td>
<td>9%</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Vegans, Vegetarians, Re-Balancers, Non Subscribers

- Vegans
- Vegetarians
- Re-Balancers
- Non Subscribers
Behaviours
“My Food Choices are a Big Part of my Identity”

- Vegans: 63%
- Vegetarian: 45%
- Re-Balancers: 38%
- Non Subscribers: 26%

% 8-10 on a 10 point scale; n=8,000
“I have made a **BIG** effort to eat more healthily”

<table>
<thead>
<tr>
<th>Category</th>
<th>Total</th>
<th>Vegans</th>
<th>Vegetarian</th>
<th>Re-Bal</th>
<th>Non Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>22%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td>19%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>US</td>
<td>24%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>DE</td>
<td>21%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SW</td>
<td>10%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

% Have made a big effort in the past 12 months
“I have made a **BIG** effort to reduce the amount of plastic I buy”

<table>
<thead>
<tr>
<th>Total</th>
<th>Vegans</th>
<th>Vegetarian</th>
<th>Re-Balancers</th>
<th>Non Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>20%</td>
<td>40%</td>
<td>29%</td>
<td>31%</td>
<td>16%</td>
</tr>
</tbody>
</table>

- Ireland: 19%
- UK: 18%
- US: 14%
- DE: 28%
- SW: 18%

% Have made a big effort in the past 12 months
“I have made a **BIG** effort to reduce my carbon footprint”

<table>
<thead>
<tr>
<th>Total</th>
<th>Vegans</th>
<th>Vegetarian</th>
<th>Re-Balancers</th>
<th>Non Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>11%</td>
<td>34%</td>
<td>22%</td>
<td>18%</td>
<td>8%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country</th>
<th>Vegans</th>
<th>Vegetarian</th>
<th>Re-Balancers</th>
<th>Non Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ireland</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>UK</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>US</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>DE</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>SW</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
</tbody>
</table>

% Have made a big effort in the past 12 months
Recent Behaviours

- Eat more healthily
- Exercise more
- Reduce the amount of plastic I buy
- Be more aware of the environment around me
- Share images on social media more
- Increase the proportion of shopping I am conducting online
- Follow more fitness and lifestyle bloggers on social media
- Be more open and accepting of others who may have different opinions and outlooks on life to me
- Reduce specific foods or food types from my diet

Q. Which of the following have you made an effort to do in the last 12 months, if any? Made a big effort to do N=318; All Vegans; N=458; All Vegetarians; N=951; All Rebalancers
Why “Plant Power”?
A complex ecosystem of motivators

Wellness
- Intrinsic
  - Wellness
  - Belonging
  - Peer Influence
  - Purpose
  - Wellbeing

Rational
- Allergens
- Preventative
- Taste
- Health
- Medicinal
- Eco Impact
- Ethics
- Animal Welfare
- Seen to be Doing Right
- Badging

Extrinsic
- Extrinsic

Emotional
- Purpose

Identity
- Planet
- Belonging
- Planet
- Identity

Intrinsic
- Intrinsic

Extrinsically
- Extrinsic

An ecosystem where rational, emotional, and intrinsic factors interact, influencing wellness, belonging, identity, and planet.
Vegan Motivations are complex

**Wellness**
- Physical Health 40%
- Mental Health 39%
- Feel Stronger, Fitter 36%
- Lose Weight 28%
- Medical Advice 24%
- Intolerance 21%

**Identity**
- Distinguish from Others 22%
- Documentary on TV 23%
- Social Media 22%
- Celebrity or influencer 16%

**Belonging**
- Friends and Family 21%
- Conversations with peers 19%

**Planet**
- Animal Welfare 46%
- Environment 46%

% Very Influential

*Influences*
Vegetarian Motivations are complex too... but less extreme.

**Influences**

**Wellness**
- Physical Health 31%
- Mental Health 15%
- Feel Stronger, Fitter 27%
- Lose Weight 26%
- Medical Advice 7%
- Intolerance 10%

**Identity**
- Distinguish from Others 7%

**Belonging**
- Friends and Family 10%
- Conversations with peers 14%
- Documentary on TV 13%
- Social Media 10%
- Celebrity or influencer 9%

**Planet**
- Animal Welfare 30%
- Environment 32%
Plant Powered Benefits
Better Skin
More Energy
Lose Weight
Better Skin
Better Sleep
Mental Wellbeing
Better Concentration
More Confidence
Impact of Diet

Q. How long after you committed to your diet did you notice the below outcomes, if at all? 951 Rebalancers; 458 Vegetarians; 318 Vegans.
<table>
<thead>
<tr>
<th>% Very Satisfied with….</th>
<th>Impact of Environment</th>
<th>Energy Levels</th>
<th>Body Image</th>
<th>Mental Health</th>
<th>Fitness Levels</th>
<th>Overall Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vegan</td>
<td>33%</td>
<td>33%</td>
<td>29%</td>
<td>36%</td>
<td>29%</td>
<td>61%</td>
</tr>
<tr>
<td>Vegetarian</td>
<td>20%</td>
<td>16%</td>
<td>17%</td>
<td>30%</td>
<td>13%</td>
<td>42%</td>
</tr>
<tr>
<td>Re-Balancer Vegetarian</td>
<td>20%</td>
<td>14%</td>
<td>15%</td>
<td>35%</td>
<td>12%</td>
<td>41%</td>
</tr>
<tr>
<td>Non-Subs</td>
<td>16%</td>
<td>11%</td>
<td>11%</td>
<td>34%</td>
<td>8%</td>
<td>31%</td>
</tr>
</tbody>
</table>

8-10 on a 10 point scale; n=8,000

The Thinking House
Dietary Challenges
Defection

% “Used to Be” VEGAN
4%

11% of these are now vegetarian

% “Used to Be” VEGETARIAN
8%

8% of these are now vegan

Why?

- It was too hard to follow when eating out: 57%
- It was too difficult: 54%
- I wanted a better choice of food: 52%
- My priorities in life had changed: 49%
- I noticed a drop in my energy levels while on the diet: 49%
- It was very difficult for my family/friends: 49%
- It was too expensive: 48%
- My health was suffering as a result of my food choices: 46%
- I didn’t enjoy my food: 45%
- Other, please specify: 42%
It’s not all plain sailing
Top 10 Challenges Faced in Diet….

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Vegan</th>
<th>Vegetarian</th>
<th>Rebalancer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating out in restaurants</td>
<td>57%</td>
<td>67%</td>
<td>49%</td>
</tr>
<tr>
<td>Finding convenience food that suits me</td>
<td>55%</td>
<td>66%</td>
<td>48%</td>
</tr>
<tr>
<td>Having variety in my diet to keep it interesting</td>
<td>54%</td>
<td>59%</td>
<td>49%</td>
</tr>
<tr>
<td>Getting enough protein in my diet</td>
<td>51%</td>
<td>61%</td>
<td>43%</td>
</tr>
<tr>
<td>Affording to only buy products that are suitable</td>
<td>50%</td>
<td>59%</td>
<td>43%</td>
</tr>
<tr>
<td>Ease of meal preparation</td>
<td>48%</td>
<td>60%</td>
<td>42%</td>
</tr>
<tr>
<td>Travelling overseas</td>
<td>45%</td>
<td>64%</td>
<td>34%</td>
</tr>
<tr>
<td>Sourcing all the food and beverages that are suitable</td>
<td>45%</td>
<td>59%</td>
<td>37%</td>
</tr>
<tr>
<td>My family / friends found it difficult to make</td>
<td>44%</td>
<td>61%</td>
<td>32%</td>
</tr>
<tr>
<td>Getting a sufficient amount of carbohydrates</td>
<td>44%</td>
<td>64%</td>
<td>36%</td>
</tr>
</tbody>
</table>
Macronutrient Challenges… % Difficult

- Carbohydrates: Vegan 16%, Vegetarian 12%
- Vitamins: Vegan 20%, Vegetarian 19%
- Fibre: Vegan 20%, Vegetarian 10%
- Fats: Vegan 21%, Vegetarian 11%
- Protein: Vegan 21%, Vegetarian 14%
- Calcium: Vegan 22%, Vegetarian 13%
- Minerals: Vegan 23%, Vegetarian 15%
Expedience

Morality

Pleasure

Nutrition
I wouldn’t be vegan because it is too difficult. I would like to be vegan but it is just so time consuming.

2 in 3 Vegans & Vegetarians find lack of convenience options to be a challenge....
6 in 10 Vegans struggle with affordability
“The two of us would be big into animals anyway. I can’t say though that I would rule out leather bags.”

Re-Balancer: 20-24
6 in 10 Vegans & vegetarians find it tricky to get enough protein in their diets
Diet Challenges

What challenges did you face when you started your diet?
Likely to Consider this dietary lifestyle in future?

- **Very Likely**
  - Vegan: 3%
  - Vegetarians: 4%
  - Re-Balancer: 8%

- **Might Consider**
  - Vegan: 10%
  - Vegetarians: 22%
  - Re-Balancer: 32%
Q. And thinking now about the future; which of these types of diet would you consider?

- I couldn't live without meat
- My diet would be too bland
- I need to eat meat to stay healthy
- I'm unsure the impact this might have on my body
- Too much hassle for the family
- It's more expensive to eat this way
- It takes up too much time
- Other

Not Open to being a Vegan
Not Open to being a Vegetarian
Not Open to being a Flexitarian

Non Subscribers
Not Open to Diet

41.2%
Exploring Opportunities
“..If novelists know anything it’s that individual citizens are internally plural: they have within them the full range of behavioural possibilities. They are like complex musical scores from which certain melodies can be teased out and others ignored or suppressed, depending at least in part on who is doing the conducting”

Zadie Smith
DIETARY LIFESTYLE CODES: Championing the diet of tomorrow
Clean

Natural, healthy products
Clear labelling
Purchasing any one of Soulfull's oatmeal products supports the sourcing of wholesome ingredients and the Non-GMO Project Verified initiative, and also with every serving you eat, a serving of the 4 Grain cereal is donated to a food bank in your region ("A serving for a serving").
Jeni's uses Direct and Fair Trade ingredients in all of its premium ice cream, while also employing a diverse workforce of women- and minority-owned businesses: "Making ice cream this way requires more work and skill than traditional ice creams made with flavorings and colorings, but we think it’s worth it."
c5

Colourful
Contemporary

DON'T BE A TOSER THIS PANCAKE DAY!
**What:** Chipotle Mayonnaise  
**The Lowdown:** Rubies in the Rubble’s range is handmade in the UK from fresh fruit and veg that would otherwise go to waste. For Rubies new vegan chipotle mayonnaise, the team whisk aquafaba (water drained from a can of chickpeas), together with rapeseed oil, a pinch of salt and a squeeze of lemon juice along with a hint of Dijon mustard – or a good dose of Chipotle chilli powder – to create vegan mayonnaise, with all the satisfying creaminess of regular mayo. Winner.
C6 Creative
Crispy, chompy, chewy
c8

Cheap(er)

Creating affordable products..
c9

Classic Credentials
(Best in class products)
Classy Packaging
c10

Convenient
Follow our train of thought:


- Markets and Markets. (2018). *Meat Substitutes Market by Type (Tofu & Tofu Ingredients, Tempeh, Textured Vegetable Protein (TVP), Seitan, and Quorn), Source (Soy, Wheat, and Mycoprotein), Category (Frozen, Refrigerated, and Shelf-Stable), and Region - Global Forecast to 2023*. Markets and Markets. Retrieved from https://www.marketsandmarkets.com/Market-Reports/meat-substitutes-market-979.html?gclid=EAIaIQobChMIysjj5MX63gIVQ7TtCh32iq4JEAAYASAAEgLarfD_BwE

Follow our train of thought:

Follow our train of thought:

- See reference above
- See reference above
Pictures..with thanks to..

GNPD – Mintel
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Derek Sarno, Indy Power & Holly White
Rubies in the Rubble
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Back Forty Beer Company
The Soulfull Project
Bol
Braggs Apple Cider Vinger: Flickr.com