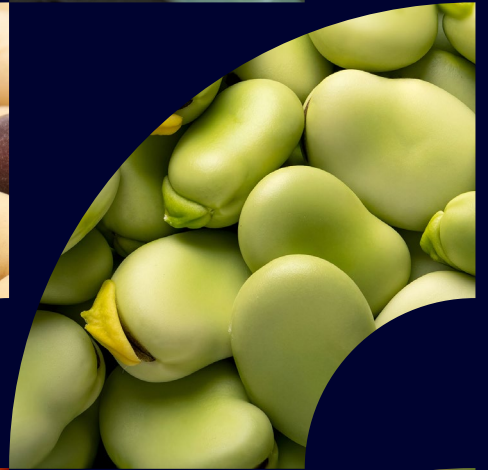


food
frontier

Year in Review 2022





Amidst volatile global markets, 2022 saw the vibrant alternative proteins sector transform in new ways – braving expected headwinds while simultaneously taking leaps forward.

Food Frontier continued steadfastly in our work to build a healthier, more sustainable food future. We broke new ground, hosting the first-ever dedicated AltProteins conference in Australia and New Zealand, to tremendous feedback. We also evolved our organisation to keep pace with the burgeoning new proteins industry, introducing a new brand and website, and expanding our team and Board.

The year ahead suggests an inflection point for both the industry and Food Frontier. We're excited, anticipating the impact of new protein technologies like precision fermentation products and cultivated meat edging closer to the market in Australia and New Zealand, and we're proud of what we have in store. In 2023, Food Frontier will launch its most substantial research report to date, providing deep insights on export opportunities across key Asian markets. We'll also once again host the sector for critical conversations and collaboration as our conference returns to Melbourne.

We remain ever grateful to our collaborators whose generous support powers our progress. Together, we are creating a diverse protein supply that will safely and sustainably feed our region for generations to come.

With gratitude,

Thomas King, Founder & Chair

Our Impact

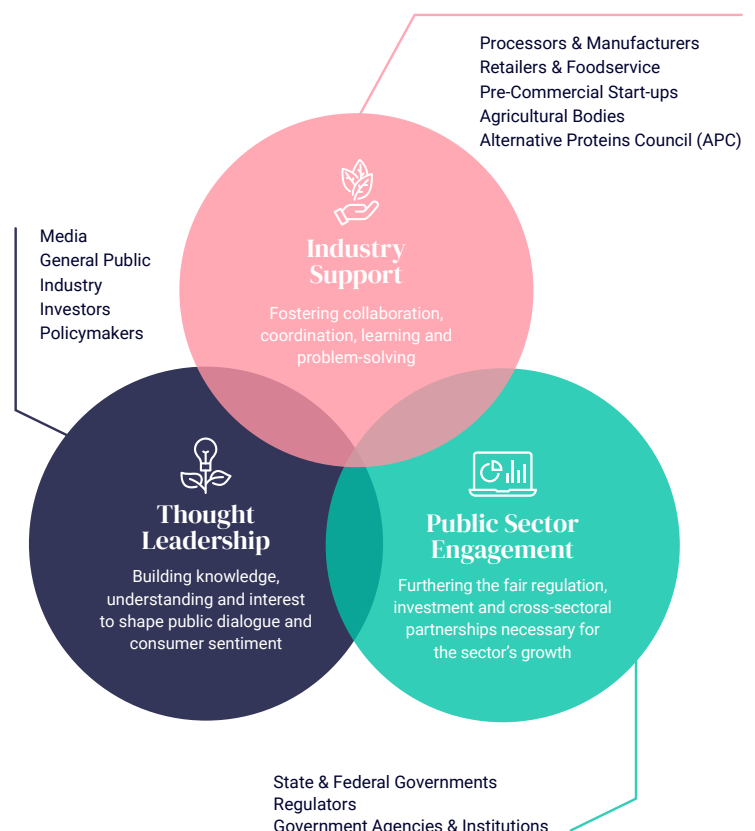
With the world's population predicted to grow to 10 billion by 2050, demand for protein continues to rise, while resources become more scarce. Nutritious, sustainable and satisfying protein alternatives – made from plants, cell-cultivation and precision fermentation – offer new protein choices for consumers and help address major threats to our ecology, economy, and health.

Food Frontier's work is advancing the growth of these alternatives in Australia and New Zealand. Our impact will be to leave future generations with a world that has less disease, improved food security, a more stable climate, and more wild places.

Our Approach

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.

Food Frontier helps businesses, policymakers and innovators to understand the emergence and unlock the benefits of protein alternatives made from plants, cell-cultivation and precision fermentation. 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

10.3M+

Media Impressions

across over 160 stories in TV, radio, print, podcast and online channels, encompassing both quotes and research references

10

Presentations

at key events and to top decision-makers across the agri-food sector, and with government, foodservice and alternative proteins leaders

100%

Amongst the Industry

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

260+

Direct Conversations

sharing guidance and insights with influential stakeholders, from leading manufacturers and retail giants, to agricultural bodies and government officials

233K+

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 18% growth in followers across our social and owned channels

300+

Attendees at Food Frontier events

including at AltProteins 22, industry roundtables and other Food Frontier gatherings



Delivering Data & Insights

3.2K+

Downloads of reports
and resources

233K+

Social media
impressions

10

Presentations

10.3M+

Media impressions
across 160 stories

300+

Attendees at AltProteins 22
& other events

AltProteins 22

In May, we hosted the first-ever (and sold out!) dedicated alternative proteins conference in Australia and New Zealand, uniting nearly 300 agri-food industry leaders, retailers, innovators, investors, food service providers and policymakers who are shaping our region's complementary proteins sector.

The inaugural event, hosted at W Melbourne with lead sponsorship by the Victorian Government, was designed to enable the critical conversations and collaboration required to help realise the industry's potential. A robust day of considered programming included a keynote by the renowned food futurist Tony Hunter, a dignitary address by the Victorian Minister for Agriculture, international insights from the CEO of Meatless Farms, and a mix of panels and presentations covering the scope of our region's alt-proteins landscape - across the supply chain, and looking into the future. Catering featuring our food sponsors' products allowed attendees to taste a wide range of plant-based meat dishes, which garnered rave reviews.

By all accounts the day was a success: 95% of attendees rated their experience as very good or excellent; 100% felt the conference met or exceeded their expectations and 95% said they would attend another AltProteins conference.

Media storytelling generated 60+ articles with 5.2M impressions, with a key signature story on leading business outlet ABC Radio National, along with other radio spots, and penetration into rural/agricultural media through two Australian Community Media articles and an ABC Country Hour story. There were 100+ social media posts from speakers and attendees sharing event insights and experiences.

In October we were thrilled to announce the event will return in 2023, with expanded capacity for 500 attendees and a broader program. In a clear signal of investment and support for emerging proteins, the Victorian Government Department of Jobs, Precincts and Regions will return as the Lead Sponsor for AltProteins 23, which will be hosted in Melbourne on 4 October 2023.



Amplifying insights to drive informed dialogue

Food Frontier's commentary, data and insights supported a steady drumbeat of over 160 media stories about cultivated meat, precision fermentation, and plant-based meat over 2022, garnering millions of impressions. Our previous research reports continued to drive a portion of this coverage, with 40 mentions of Food Frontier's 2019/20/21 reports' data attesting to ongoing currency and relevance.

Top media included a national profile of our Founder and Chair Thomas King in *The Age/Sydney Morning Herald's Good Weekend*, as well as stories in *The Guardian Australia*, *ABC Canberra* radio, *Nine News Melbourne* and many more.

We amplified these and other key stories about the sector through our monthly newsletter, which has seen an 11% growth in subscribers this year and an industry-high open rate of 45%, increasing from 37% at the start of the year.

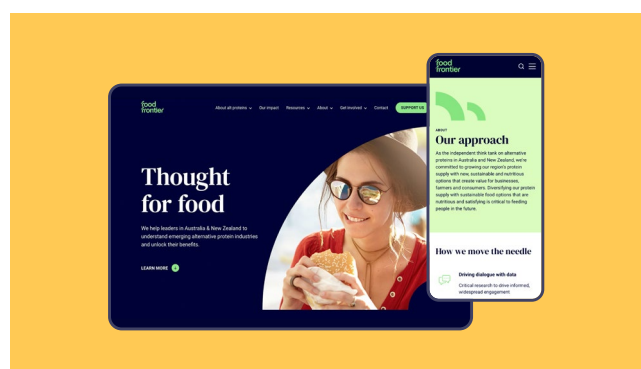
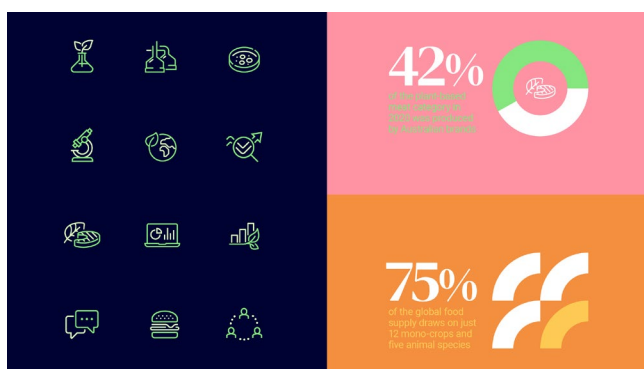
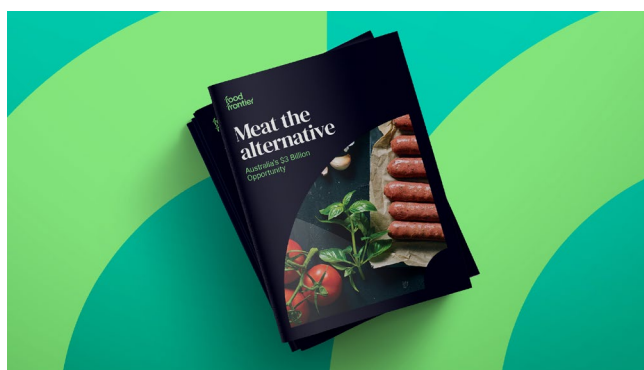
In our efforts to accelerate learning and collaboration among key decision-makers, we brought these same data and insights to key organisations across government, the agri-food industry, academia, retail, foodservice and agriculture through 10 presentations hosted for example by Business Australia, Foodbuy Australia, Agribusiness Australia and Australian Institute of Food Service.

A new look, new website and new resources

As Food Frontier continues to expand its role as the lead alternative proteins educator and facilitator in our region, and with the organisation celebrating its fifth birthday, we were thrilled to unveil a bold, contemporary new brand identity to support our growing scope and impact.

At the same time, we launched a new website to provide a more engaging, dynamic experience and spotlight the abundance of resources we produce, including research reports, news articles, press releases and other publications.

The site is home to new resources launched this year, including a [guide to the proprietary ingredient soy-leghemoglobin](#), developed in partnership with Impossible Foods to dispel any misconceptions about the ingredient. We also published "[Meat alternatives and health: What are the facts?](#)", a synopsis of the latest research on Australian and New Zealand dietary patterns, the health implications of current protein consumption, and the potential of alternatives like plant-based meat to improve individual and public health.





Supporting Industry & Policymakers

100%

amongst industry agreed Food Frontier plays an essential role

260+

direct conversations to share guidance, insights and introductions with influential stakeholders, from leading manufacturers and retail giants, to agricultural bodies and government officials

9x

sets of in-depth consultations on critical sector needs and developments, including government inquiries, major investment applications, and regulatory briefings

Equipping industry with resources and insights

Enabling greater learning and collaboration across the industry remains a top priority for Food Frontier, informing the agendas for our twice-yearly industry roundtables and presentations, as well as the development of focused resources. This year we delivered two guides on the retail and foodservice channels to provide expert-informed insights to plant-based meat manufacturers seeking to navigate these often complex pathways to market.



We also embarked on developing our most ambitious research report to date, partnering with leading research firm Mintel to explore export opportunities for Australian and New Zealand alt-proteins manufacturers in five key Asian markets. The research has been enabled by our generous supporters Te Puna Whakaaronui, New Zealand's primary sector think tank, and the project has been greatly empowered by Open Philanthropy. The findings will be synthesized early in 2023 bringing accessible insights for identifying and actioning export opportunities in key Asian countries, thereby growing value for alternative protein manufacturers and the associated ecosystem.



As the plant-based landscape continues to evolve at great speed, Food Frontier plays a pivotal role. They bring together a wide range of stakeholders to facilitate discussions that help us address shared challenges, and enable us to grow together to create a sustainable plant-based industry here in Australia.



Andrew May
Chief Growth Officer



Driving stakeholder learning, collaboration & problem-solving

Key to our ability to make connections and address challenges across the sector is our continuous stakeholder engagement. This entails hundreds of one on one discussions, as well as joining forums led by the Commonwealth Scientific and Industrial Research Organisation (CSIRO), Food Standards Australia New Zealand (FSANZ), Future Alternative and others. One such forum hosted by Cellular Agriculture Australia focused on mapping strategy across priorities in social acceptance,

infrastructure, policy/advocacy, talent and regulation for the cellular agriculture sector - and Food Frontier will continue actively engaging and supporting cellular agriculture startups in these key areas. We are also playing a key role in discussions preparing for the third bid for the Alternative Proteins CRC which would see significant federal investment alongside commercial commitments to advance alt-proteins R&D in the region.

Evolving the industry body

Since founding the Alternative Proteins Council (APC) in 2021, the organisation's role as a voice for Australia and New Zealand's alt-proteins sector has grown. This year Food Frontier facilitated the APC's transition to a paid membership model in a new governance structure, hosted as a managed forum by the Australian Industry Group, to ensure continued sustainability and independence. Food Frontier remains an active member, providing leadership amongst the APC through key initiatives this year including the launch of the first Industry Guidelines for the Labelling of Meat Alternative Products in Australia and New Zealand.



Supporting investment in the region

Our engagement with government leaders continues to build understanding of the \$3bn economic potential illustrated by Food Frontier's 2019 and 2020 plant-based meat sector economic modelling with Deloitte. Recognition of this opportunity has begun to take hold, with key developments including:

South Australia

A successful grant application (which included Food Frontier data) to build three plant protein fractionation facilities in South Australia secured \$178m in government support. The investment is projected to create 8,500 jobs and generate billions in export revenue - a critical step in value-adding locally grown crops and expanding supply of quality plant protein.

Victoria

The Victorian Government's *Made in Victoria 2030: Manufacturing Statement*, which outlines the Government's ongoing plans for the state's \$31 billion manufacturing industry, includes alternative proteins for the first time as a priority area for investment.

New South Wales

Following a submission by Food Frontier earlier this year, the NSW Government's final report on the senate inquiry into Food production and supply in NSW, included a recommendation to investigate opportunities to promote the growth of the plant-based protein manufacturing industry in NSW, citing Food Frontier data multiple times.



Food Frontier's trusted research data and insights assisted us in building our business case to successfully secure \$378 million for our consortium plant processing facilities in South Australia – including \$178 million in public investment across both federal and state governments. Keep up the good work Food Frontier!



Phil McFarlane
Co-Founder & Director

Evolving our strategy, operations and governance

Along with Food Frontier's leadership transitions and growing team, 2022 saw the evolution of our ESG journey and the establishment of a three-year operating plan and key organisational policies.

Our 2023-25 Operational Plan includes a series of strategic priorities for Food Frontier's work in continuing to accelerate the burgeoning alternative proteins ecosystem, and helping it to navigate challenges and opportunities ahead. These priorities are focused on increasing evidence for and understanding of alternative proteins; strengthening pathways for engagement across the supply chain; engaging consumers and furthering the business case for government investment.

They also inform Food Frontier's continued expansion with the hiring of additional executive roles to meet the many opportunities arising. The Plan is underpinned by a series of new governance policies, including **key policies** for risk management, diversity and inclusion, gender equity, and so much more.

As we enter a new year, our growing team and board continue taking steps to strengthen Food Frontier's foundations, enabling further progress towards our founding mission. Thank you for being part of the journey!



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. As a DGR (deductible gift recipient) charity, we welcome your tax deductible donations via foodfrontier.org/support-us or email us at giving@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.



Interview Us

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



Get Data & Insights

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



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

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