



Year in Review 2023





Alternative proteins in 2023: Navigating challenges, celebrating growth, and expanding horizons in Australia and New Zealand

2023 has been a significant transition year for the alternative proteins sector, building on substantial investment from recent years, while battling headwinds created by financial and cost-of-living pressures. Australia and New Zealand have fared well compared to the US and EU countries. More than 40 companies in Australia and New Zealand are now producing plant-based meats and developing cultivated meat and precision fermented dairy products and other ingredients, achieving progress across formulation, production partnerships, institutional foodservice and beyond.

Food Frontier has spearheaded collective problem solving for alternative proteins via thoughtfully designed roundtables, webinars, and our flagship AltProteins conference—the largest event of its kind in the southern hemisphere—while our extensive report Alternative Proteins and Asia delivered valuable market, consumer and regulatory insights from our research collaboration with Mintel.

Momentum for protein alternatives continues to build globally, with increasing recognition of their important environmental and public health benefits. Urgency for action is increasing, and we are witnessing governments implementing plant-forward strategies to tackle climate change in countries such as South Korea, Denmark, Germany, and Canada. Food Frontier is engaged with government departments at state and federal level on ways alternative proteins can support emissions reduction, while advancing regional development, advanced manufacturing, and new food exports.

As we build upon this work in 2024, Food Frontier will also illuminate pathways to scale cellular agriculture and plant protein supply chains; grow engagements with neighbouring markets in Asia; and deliver the latest plant-based meat State of the Industry analysis.

With health as the major driver for those seeking to reduce their meat consumption, we will also build on our efforts to provide accurate health and nutritional information on alternative proteins and dispel rising misinformation.

Our strides toward a more diverse, sustainable, and healthy food system have covered a lot of ground in 2023. We are forging ahead, creating an even more impactful 2024.

Dr Simon Eassom, Executive Director

Vision

A diverse and sustainable protein supply that supports people and our planet to flourish.

Mission

We advance dialogue and decision-making to accelerate the market development of alternative proteins, unlocking economic, environmental and health benefits.

Our approach

Food Frontier is the independent think tank on alternative proteins in Australia and New Zealand.

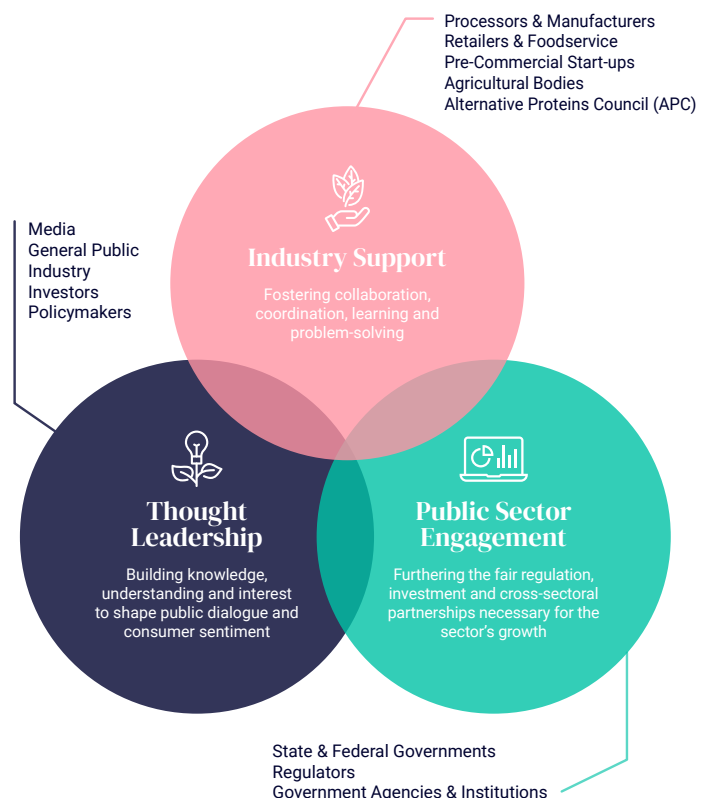
Our research reports, events, and policy recommendations are helping grow and diversify our region's protein supply to benefit people, producers, and our planet.

Sitting at the intersection of research, industry and policy, our work enables leaders to unlock the value of protein alternatives made from plants, cell-cultivation, and precision fermentation.

Our impact

With the world's population predicted to grow to 9.7 billion by 2050, demand for protein continues to rise, while resources become scarcer. Nutritious, sustainable, and satisfying protein alternatives offer new protein choices for consumers while tackling major threats to our ecology, economy, and health.

By expanding our protein sources, we contribute to a healthier future for generations to come, fostering reduced disease rates, improved food security, a more stable climate, and more natural environments.



Six years of impact

Growth in alternative proteins

The landscape for alternative proteins has evolved markedly since Food Frontier's first initiatives launched in 2018. Working with a cross-section of industry leaders, innovators, partner NGOs and policymakers, we're thrilled by the progress that's been achieved in these six years.

4 to 40+

Growth in Australian and New Zealand-based alternative protein companies.

<80 to >300

Products in the Australian plant-based meat retail category, two-thirds made locally by 25 businesses.

4th

Australia is the 4th top market for cellular agriculture based on deal count globally, and 5th for cell-ag investment with US\$176m raised.

A\$192M

invested by state and national governments towards alternative proteins, infrastructure, R&D, events and related projects in Australia and New Zealand.

26+

Government authored or funded papers now feature alternative proteins, a topic that was largely absent from government policy before 2018.

2 in 5

Nearly 2 in 5 Australians say they are trying to reduce consumption of conventional meat. 19% now follow flexitarian diets.

Food Frontier's influence

From world-first research and event partnerships with market leaders and agencies such as Deloitte, Woolworths, Austrade, the National Farmers Federation, and Compass Group; to helping set-up the region's industry association, the Alternative Proteins Council, chaired by Nestlé Australia; to running the biggest alternative proteins event in the southern hemisphere; Food Frontier has wielded significant impact and influence.

Our data and thought leadership have been shared in parliaments, boardrooms, news publications, production facilities, farms and homes across Australia, New Zealand, Asia, and the world.

78M+

media impressions across thousands of TV, radio, print, podcast and online news outlets.

22,200+

audience members reached including keynote presentations and panels at some of the biggest agri-food, foodservice, innovation, investment and alternative proteins events in our region and the world.

18,300+

direct downloads of Food Frontier's research reports spanning market and economic analysis, Asia market-entry, health and nutrition and more.

900+

attendees at Food Frontier's AltProteins 22 and 23 conferences, roundtables, webinars and other events.

1,100+

meetings taken and 320+ introductions brokered with government, food manufacturers, outlets, ingredient suppliers, agricultural leaders, researchers and investors, accelerating knowledge sharing and partnership building.

69

inclusions of Food Frontier data and recommendations in government authored or funded papers.

100%

agreement amongst industry leaders in bi-annual surveys over four years that 'Food Frontier plays an essential role in supporting the growth of the sector'.

Delivering data and insights in 2023

5,060

downloads of reports
and resources

13.5M

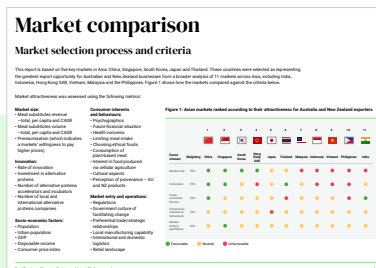
media
impressions

1,000+

new LinkedIn
followers

565+

attendees at Food
Frontier's events



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Contributing research

Our research insights were leveraged across a range of research and education settings:

- Five universities sought our input into their studies and publications spanning protein transition, regulatory compliance, precision fermentation, and consumer attitudes.
- Our insights informed a successful three-year Australian Research Council grant application to investigate alternative protein regulations and policies.
- We advised a leading dietician and co-developed a presentation that she presented at the annual conference for the dietitians' peak body. She has observed a positive shift in the group's understanding and attitudes toward plant-based meats and nutrition, and her affiliation with Food Frontier has positioned her as a trusted advisor to peak body members seeking her expert guidance on alternative proteins.
- 125 school teachers at the Western Australian Food Science Teachers association received Food Frontier's presentation and recommendations on building alternative proteins into curriculum-aligned lessons plans for classrooms.

Extensive Asia insights

Our most extensive report, Alternative Proteins in Asia, delivered market, consumer, and regulatory research undertaken with Mintel across five of the top markets for alternative proteins in Asia. The first of its scope and scale, its 180 pages of quantitative and qualitative insights are equipping alternative protein businesses, trade agencies and policymakers to boost trade and engagement with markets across Asia, namely China, Singapore, Thailand, Japan and South Korea.

The press release was picked up and syndicated across 4,272 media outlets globally, driving greater understanding about the immense opportunity Asia presents in this space. The report has been downloaded many hundreds of times and we hosted two subsequent webinars with over 100 registrants to unpack the report findings with in-market experts and answer questions.

"At Austrade, we have been continually impressed by the quality of Food Frontier's work, including its Asia market reports which are well supported by respected industry, government, and academic sources. Our teams make use of these research insights regularly."

Australian Trade and Investment Commission (Austrade)



The biggest conference of its kind

Our AltProteins conference returned for a second year and became the biggest alternative proteins event in the southern hemisphere, attracting 419 in-person attendees from across the Asia Pacific (50% more than 2022). The event featured 12 sessions, with 41 expert speakers from Australia, New Zealand, China, Singapore and the United States, and pitches from three start-ups.

The carefully curated menu featured some of the region's best plant-based meat products, garnering rave reviews.

With 16 sponsors including lead sponsorship from the Victorian Government, the conference has become self-sustaining, providing value for the ecosystem, impact for our food system, and greater sustainability for Food Frontier.



"Food Frontier's AltProteins 23 was a really positive experience for the Magic Valley team including being invited to take part in the Pitch session. We made some great connections at the conference, including potential funding leads, and a number of connections for later stage collaboration as we prepare to commercialise our cultivated meat products. Food Frontier has taken great interest in our work and supported us whenever possible."

Paul Bevan, Magic Valley

"Not many conferences attract such a diversity of innovators and thinkers across the food value chain, including major supermarkets, manufacturers, government, researchers, founders and venture capitalists... I made valuable connections right across the board."

Jeremy Lomman, Integra Foods

95%

of attendees' expectations of the day were fulfilled or exceeded.

88%

made 'new, useful connections' with more than a third making 3-6 or more new and useful contacts.

100%

reported feeling 'more' or 'much more' committed to advancing alternative proteins post-event.

65+

representatives from state and federal, and international governments attended.

Reaching audiences far and wide

Media

Food Frontier's data and expert commentary appeared in more than 4,500 media outlets. Topics ranged from stories about cultivated meat regulation, consumer attitudes, and climate change. Our research on export opportunities for alternative proteins in Asia was syndicated across media in the United States and Asia.

In addition to regular coverage in industry media, our work reached key mainstream outlets including the ABC, Sydney Morning Herald/The Age, News Corp's Body & Soul, Channel 7's House of Wellness, and The Guardian. Other outlets included Yahoo! Finance, Bloomberg, Money Magazine, Farm Online, and Food Navigator Asia.

The monthly Food Frontier news updates achieved a high 43% average open rate among recipients from industry, research, government, and the public, demonstrating the appetite for our insights and data. In 2023, social media impressions surged by 25%, because of compelling and strategic content and an increase in communications capacity.

Presentations

Food Frontier was invited to speak at a range of national and international events this year reaching over 600 audience members. From consumer attitudes research in Asia, to domestic and global market forecasts, to key advancements and investment opportunities, we shared our expertise and recommendations through eight keynotes, presentations and panels at a range of industry, technology and policy events: CellAg Summit, Nexus Global Summit, Food Hack, Futures Conference, Effective Altruism Australia, SxSW Sydney, WestTech Fest, and the keynote at AltProteins 23.



Advancing industry and policy in 2023



meetings to help food businesses, farmers, researchers, retail giants, and government



introductions connecting industry, investors and policymakers



major policy consultations received Food Frontier data and recommendations spanning R&D, industry development, sustainability, health



agreement among roundtable surveys that Food Frontier plays essential role

Fostering problem-solving & partnerships

Across 241 meetings and 58 introductions spanning from farming, ingredients and manufacturing to foodservice and regulation, we helped accelerate knowledge sharing and partnership building across the ecosystem while yielding valuable insights that have informed Food Frontier's research, publications, and government engagements.

We hosted three industry roundtables, convening most of the region's alternative protein companies for learning and collective problem-solving:



We first partnered with the largest institutional foodservice provider, Compass Group, to host foodservice speakers and industry networking in Sydney.



The second fostered knowledge-sharing and alignment among cellular agriculture ecosystem members ahead of the first AU/NZ regulatory application review and consultation.



The last brought together plant-based meat manufacturers and plant breeders to inform the Victorian Government's pulse breeding program, as well as peer-to-peer problem-solving about ingredient optimisation, category building and marketing.

In the eight months following our foodservice roundtable, Food Frontier assisted FoodBuy to evaluate and meet with Australia's plant-based meat manufacturers to expand options on their menus.

We also continued to play a key role in the third bid attempt for the Alternative Proteins Cooperative Research Centre (CRC), which would see significant federal investment alongside commercial commitments to advance alt proteins R&D in the region.



"Food Frontier plays a pivotal role in nurturing the alternative protein industry, with their roundtable events serving as a catalyst for innovation and collaboration. The insights shared through research projects are invaluable and unbiased, allowing organisations to make data led decisions. Their commitment to connecting key industry leaders and fostering relationships has been instrumental in driving the growth and success of the alternative protein sector."

Simon Jackson, Compass Group Australia



Advancing regulation

As the Alternative Proteins Council (APC) continues evolving as the industry association, Food Frontier has actively participated alongside other members to further guidelines, audit and compliance for labelling of meat and dairy alternatives. We also initiated discussions that resulted in an industry-led category building initiative, with companies now working collaboratively to promote greater consumer trial and repeat purchase. Our insights supported preparations for the Council's House Agriculture Committee Inquiry appearance on Australian Food Security.

In addition, as cellular agriculture products edge closer to the market, Food Frontier has connected regulators, companies and other not-for-profits to share consumer research and support coordination ahead of the first public consultations on the regulation of cellular agriculture products.

Advising policymakers

Through more than 80 official government meetings, Food Frontier has built and fortified relationships with 20 departments across Australia and New Zealand, covering the investment, trade, manufacturing, agriculture, innovation, and climate change portfolios. This included meetings with ministers and parliamentary representatives to spotlight industry bottlenecks and investment opportunities, and facilitate introductions between companies and government departments to enable infrastructure development, joint R&D, and expansion.

Following sponsorship of AltProteins 23 and ongoing engagement with state departments and agencies, the Victorian Government established the cross-departmental Alternative Proteins Working Group. Food Frontier presented at the inaugural meeting on potential policy initiatives.



“DJSIR deeply values its relationship with Food Frontier. Their insights and engagement in the alternative proteins sector is essential. Together, we can all work to continue the great progress made this year and further grow the sector in Victoria.”

Jonathan Reichwald, Director Manufacturing Industry and Development, Victorian Department of Jobs, Skills, Industry and Regions

Input to major consultations

Reshaping Australian Food Systems, a pivotal roadmap by Australia's national science agency CSIRO, cited Food Frontier data and incorporates recommendations made in Food Frontier's submission, recognising alternative proteins' role in making Australia's food systems more sustainable and resilient.

Additional submissions were made to federal government consultations including the National Reconstruction Fund – a \$15 billion fund aimed at stimulating onshore priority industry growth; and the National Science and Research Priorities and National Science Statement. Consultation guides were developed to support others to respond.

Food Frontier presented to the Federal Department of Industry, Science and Resources as part of its food and beverage processing industry consultation and submitted evidence and expert advice to Western Australia's Parliament Education and Health Standing Committee on the health, sustainability and consumer aspects of alternative proteins.

Strengthening our strategy and operations

This year we welcomed several new team members including Executive Director Dr Simon Eassom, an executive leader and strategist with an extensive academic and corporate career and a deep interest in diversifying protein supply to drive positive health and environmental outcomes. In addition to program delivery, Simon and the team made a suite of operational improvements, increasing efficiency and effectiveness across strategy and planning, measurement, CRM, financial management, policies and procedures.

We also welcomed to Food Frontier's Board Anne Astin AM PSM PhD, a distinguished food scientist and executive and non-executive leader in Australia and New Zealand's food innovation and agriculture sectors, having worked in food safety regulation, public health, traditional protein industries, and natural resources and environment.



Donate

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

Just as not-for-profits have played a crucial role in enabling a faster shift to greener, cleaner energy, Food Frontier is accelerating the growth of sustainable, and satisfying protein options within the food sector.

Unlike other areas such as education reform, medical research or energy transition, efforts to transform our food systems—especially protein supply—are severely underfunded, despite the immense benefits to people and our planet.

Food Frontier is the only tax deductible not-for-profit in our region accelerating alternative protein solutions. Our work is made possible thanks to the generous support of philanthropic organisations and individuals.



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