



YEAR IN REVIEW 2020



Dear friends,

This has been a year of challenges – and change – as we’ve watched the virus heed no borders, reminding us how interconnected our global ecological, economic and food systems are.

COVID-19’s systemic disruption worldwide has increased questions of food system safety and security. In particular, the risks of continuing our heavy reliance on industrial animal agriculture are ever-more-acute in the minds of public health experts, climate scientists and agribusiness giants worldwide.

While experts have long warned that intensive meat production poses risk of spurring pandemics of zoonotic origin, a report this year by the UN Environment Programme and International Livestock Research Institute, *Preventing the next pandemic*, underscored the gravity of this issue.

Media headlines in 2020 continued to warn about the ecological consequences of industrial animal agriculture, which are testing the limits of planetary boundaries yet will fall short of meeting increasing global demand. Famed naturalist Sir David Attenborough recently rang this alarm bell, imploring people to eat less meat. Alongside traditional protein sources, less resource-intensive proteins are essential to feeding our growing populations.

It’s abundantly clear: we must accelerate emerging protein alternatives to future-proof global food systems.

Alternative proteins – particularly meat alternatives made from plants and animal meat cultivated from cells – are a critical part of the solution, here and around the globe. Governments, investors, businesses and meat processors worldwide are already seizing this multi-billion-dollar opportunity. In 2020, plant proteins saw investment from governments in the EU, Canada and Singapore, while Singapore and the EU’s European Commission also invested in cellular agriculture. Powerful multinationals like Nestlé, Cargill and Kellogg’s launched new plant-based meat brands. Down under, the alternative proteins ecosystem grew nearly threefold, from seven local companies selling plant-based meat products early last year to 20 in market today, while cellular agriculture companies doubled from three to six.

These investments and launches signal the emergence of a rapidly developing industry set to transform the proteins we eat.

As the independent think tank and expert advisor on alternative proteins in Australia and New Zealand, Food Frontier’s work demonstrates how these alternatives are nutritious, sustainable and economically valuable solutions to diversifying our protein supply.

Our initiatives foster the partnerships and investments essential to the accelerated growth of these solutions in our region. Through this activity, in a region projected to represent the greatest proportion of increased meat consumption, we are helping to catalyse a shift towards alternatives that can better our global food system.

In 2020, our global-first report on the health and nutrition of plant-based meats answered an increasingly common question – *are plant-based meats a healthier choice?* – with data and insights welcomed by prominent leaders in nutrition and amplified across national media. Our forums and direct engagements strengthened the local alternative proteins ecosystem by fostering conversations and collaboration within the food and agriculture sector. Our third industry roundtable (over Zoom, of course) united 35 alternative protein business leaders, a moment reflecting the industry’s growth. It’s a journey we’ve travelled with them every step of the way.

I share these reflections with great pride in the incredible work delivered by our team amidst extraordinary events this year. We doubled in size in 2020, a move that expands our expertise and will advance the growth and impact of alternative proteins in our region.

We look forward, like many, to turning the calendar over to 2021. We have high hopes this new year represents a fresh (re)start to embolden our mission towards a safer, more sustainable and diversified protein supply.

And we say this with the utmost gratitude for the supporters who enable our work. It is your collaboration, encouragement and sharing in our vision that fuels our efforts to drive forward a brighter food future.



Thomas King
CEO
Food Frontier

OUR YEAR AT A GLANCE

GLOBAL-FIRST DATA

Informed and shifted the dialogue amongst consumers, health practitioners and media asking whether plant-based meats are a healthier choice via a first-ever report on the health and nutrition of these products



ACCELERATED INDUSTRY COLLABORATION AND GROWTH

Drove learning, discussion and problem-solving around shared industry challenges via initiatives including our third industry roundtable involving almost every company across the industry, and the launch of our new focus groups

GREW AGRICULTURAL ALLIANCES



Poised the alternative proteins industry to form partnerships with the broader agriculture sector to accelerate research, investment and innovation in new protein sources, by establishing the first organised initiatives with peak agricultural bodies

INFORMED HALF OF ALL MEDIA COVERAGE IN AU/NZ



Food Frontier quotes and/or insights from our 2019 and 2020 research were used in nearly half (49%) of all AU & NZ alternative proteins stories



100% TEAM GROWTH

Amplified the reach and impact of our initiatives by doubling the size of our team with the additions of Director of Strategy & Operations, Head of Industry Engagement, and Research & Content Manager



DEEPENED OUR POLICY ENGAGEMENT

Aided the future growth of the alternative proteins sector with expanded policy engagements in new fora and topics, from input to new free-trade agreements to representing the industry in the national labelling conversation

OUR YEAR AT A GLANCE



12M⁺

MEDIA IMPRESSIONS

across TV, radio, print, podcast and online channels – *in a media landscape overwhelmed by pandemic news*



175⁺

DIRECT CONVERSATIONS

with influential stakeholders, from leading manufacturers and retail giants, to national agricultural bodies and government ministers



442K⁺

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 40% growth in followers across our social and owned channels



65⁺

INTRODUCTIONS BROKERED

introductions made for local alternative proteins companies, facilitating tailored connections to investors, retailers, government and supply chain operators



5,200⁺

PEOPLE REACHED ON STAGE

business leaders, policymakers, farmers, scientists, investors and consumers reached through on-stage and online presentations



100%

AMONGST THE INDUSTRY

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

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



ABOUT FOOD FRONTIER

OUR PURPOSE

Global economic, environmental and public health authorities continue to urge for a reduction in both meat consumption and our reliance on industrial systems of livestock farming and fishing. Their message is clear: diversifying protein supply is essential to feed humanity into the future.

A critical part of a safer and more sustainable protein supply, alternative proteins serve to meet evolving consumer demands, with a smaller environmental footprint and fewer public health risks.

OUR APPROACH

As an educator and facilitator at the centre of Australia and New Zealand's alternative proteins ecosystem, Food Frontier delivers data and insights on the benefits of plant-based meats and cellular agriculture. These insights bring light to opportunities, while our work facilitating connections, convening the industry and fostering positive policy pathways enables stakeholders to pursue them.

We have grown our capacity and expertise to ensure Food Frontier delivers impactful

initiatives, insights and ideas where they're most needed. In 2020, we focused on shaping the emerging narrative about plant-based meats, uniting the fast-growing commercial ecosystem and educating government and incumbent industries on the sector's value. We'll advance this work in 2021 by addressing targeted barriers to growth and equipping the industry to leverage new sectoral collaborations, better their retail partnerships, reach investors and navigate policy channels.



We've supported Food Frontier from its early days and continue to be impressed by the team's disciplined, sophisticated and highly strategic approach, which has achieved exponential influence for an organisation of their size. We could not be prouder to continue our support of their work to accelerate essential progress towards making our food systems safer, and more sustainable.

Nick Chadwick
Head of Australian Ethical Foundation



OUR FOCUS

Plant-based meat

Plant-based meats are a growing category of meat alternatives designed for people who are seeking to reduce their meat consumption, but still want a burger to throw on the barbeque, or mince for their bolognese. Made from combinations of plant proteins, oils, spices, seasonings and other plant derivatives, plant-based meats aim to replicate the experience of cooking and eating conventional meat – from preparation to appearance, texture and flavour.

Many (many new) plant-based meat ranges from Aussie and Kiwi brands have rolled out in national supermarkets throughout 2020, marking exciting progress for the local industry. From fast casual restaurants to convenience stores, national foodservice outlets including Nando's, 7-Eleven and Hunky Dory added plant-based meat to their line-ups in 2020. There are now more than 200 plant-based meat products available in grocery and foodservice across Australia to meet increasing consumer demand.



Cellular agriculture

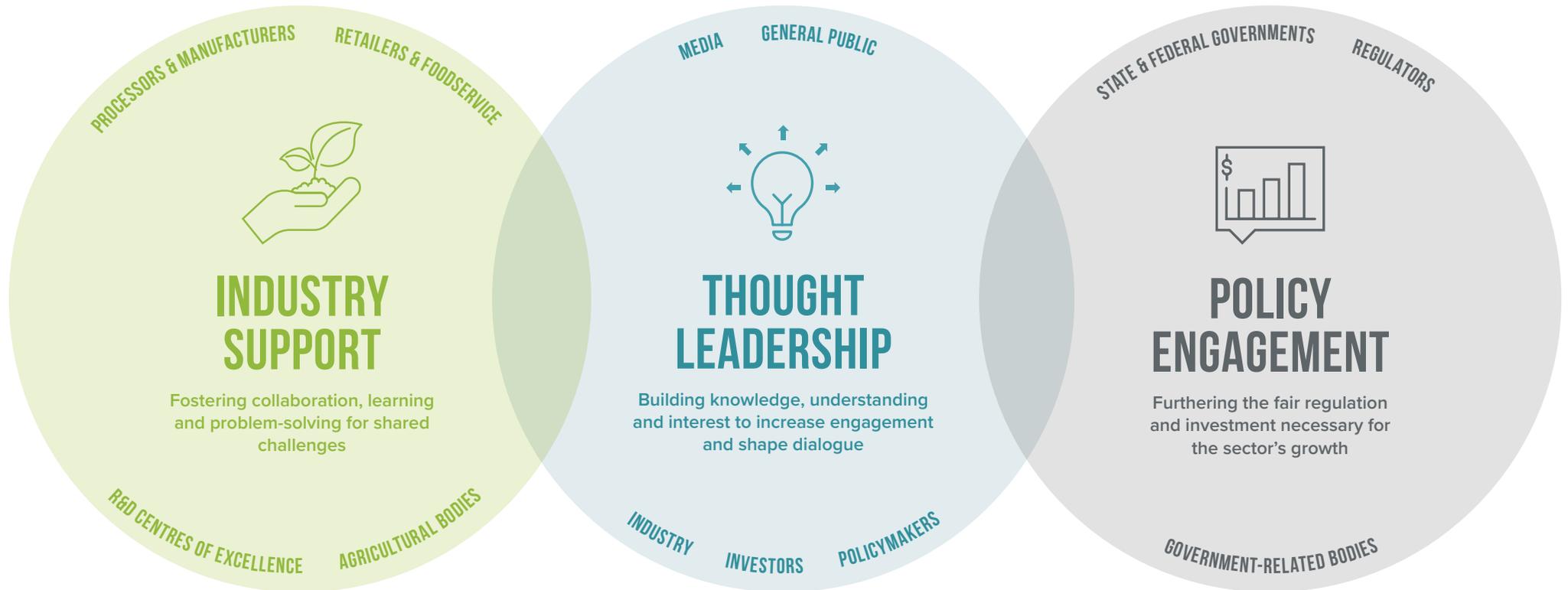
Cellular agriculture is the science that enables us to grow meat, seafood, dairy, eggs and other products from animal cells, through a process that mimics the biological process within an animal. Rather than raising and slaughtering animals, we can produce foods with the same taste and functionality of conventional animal products – but in a new, more efficient and safer way than industrial animal farming or fishing.

The local cellular agriculture sector has grown steadily in the past year, from three companies to six, with new entrants pursuing a range of opportunities from fermenting dairy proteins to cultivating meat to developing scaffolds. Investment in the local sector has provided millions in funding for ventures to further their product development and grow their teams. As markets such as the U.S., Israel and Singapore invest in the advancement of cellular agriculture research, regulation and commercialisation, Australia and New Zealand have a window of opportunity to become genuine competitors in the field.

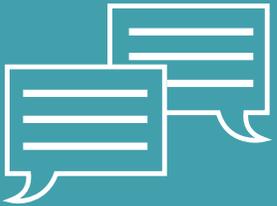


OUR PROGRAMS

Food Frontier's strategy is executed through three high-impact programmatic areas:



We shaped the narrative
in an issues-rich environment,
providing data, insights and
new content channels



DRIVING DIALOGUE

DRIVING DIALOGUE

Alternative proteins were in the spotlight down under as we entered 2020, fuelled by exponential growth of the local industry, a doubling of plant-based meat products on shelves and the suite of research and insights published by Food Frontier in 2019. Through extensive media coverage and direct engagements, these data and insights formed the foundation of many key conversations in our region about alternative proteins this year.

With greater consumer and market awareness about the fundamentals of alternative proteins, our 2020 thought leadership focused on advancing the narratives about their health and sustainability benefits. We also drove solutions-focused dialogues around how farmers can supply the raw ingredients for plant-based meat, calling out obstacles hindering the development of that supply chain.

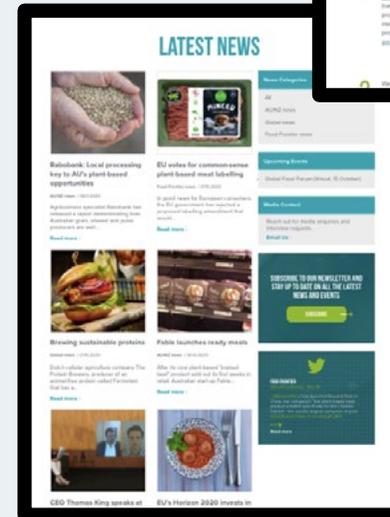
Despite pandemic-induced event cancellations, we sought new and targeted opportunities to further these narratives. Our team delivered presentations and joined panels at a wide range of virtual events to reach key stakeholders locally and globally about market developments, consumer demand, nutrition, international government investments, regulation, agricultural engagements and more.

Our major thought leadership project focused on shifting the narrative about the health and nutrition of plant-based meat through a comprehensive, first-ever study, detailed on the following page.

NEW CONTENT CHANNELS

To reach our audiences more regularly with the latest developments in alternative proteins in our region and around the globe, as well as updates on Food Frontier's work, we launched both a monthly e-newsletter and a News hub on our website in early 2020.

In turn, Food Frontier's email subscribers increased by 35% this year. This growth, coupled with consistently positive industry feedback, is a reflection of our monthly newsletter providing timely and relevant content.



35%

INCREASE IN EMAIL SUBSCRIBERS



FIRST-OF-ITS-KIND NUTRITION AND HEALTH REPORT



1600+
DOWNLOADS

4.4M+
MEDIA IMPRESSIONS

The expansion of plant-based meat offerings has attracted notable attention and seen a rise in misinformation about these products in the media and among consumers. Food Frontier saw a critical need to address the question posed by many consumers, journalists and health professionals: are plant-based meats *really* a healthier choice?

Released in August, our report, *Plant-based Meat: A Healthier Choice?*, offers a global first-of-its-kind: an analysis of the health and nutrition of plant-based meats. It also explores evidence on other factors that may influence health, from processing to ingredients, and the health risks associated with high production and consumption of conventional meat.

Developed in conjunction with leading Accredited Practising Dietitian (APD) Teri Lichtenstein, the report is a comprehensive compilation of in-depth research and provides nutritional averages of 95 plant-based meat products available across Australia and New Zealand, compared with the conventional meat equivalents to which they are an alternative: sausages, burgers, crumbed poultry and more. To simplify the report's findings and help inform consumer choices, we released an accompanying guide that offers recipes and helpful tips.

Despite journalists being nearly all-consumed by COVID-19, the report launch garnered significant attention in Australia and New Zealand with:

- 1600+ downloads to date across both publications.
- Coverage across 20+ television, print, radio and digital media outlets with an estimated audience reach of 4.4 million+. Highlights include almost two-minute TV news stories on 9 News and 7 News.
- Circulation and promotion of the report by leading nutritional professionals and members of the public health industry. One of Australia's foremost nutritionists, author and media personality Rosemary Stanton acknowledged the usefulness of the report and its findings.

The report has been widely acknowledged within the food industry, and served as the catalyst for numerous presentations to nutrition, grocery and government audiences (as seen in the **Public Speaking** section).





DRIVING DIALOGUE

PUBLIC SPEAKING

Through keynote addresses, presentations and panels exploring consumer trends, health and nutrition, labelling and regulation, retail strategy, investment and agricultural opportunities, we delivered knowledge and insights to over 5,200 industry professionals, policymakers and consumers at events run by:

5,200+

PEOPLE REACHED ON STAGE

SPOTLIGHT ON: GLOBAL FOOD FORUM



The Global Food Forum, run by *The Australian* and *The Wall Street Journal*, provided a unique opportunity for Food Frontier to join executives from some of Australia's and the world's largest agribusiness and FMCG companies in a space that aims to "set the agenda for the future of agribusiness in Australia". CEO Thomas King joined a robust panel discussion with Meat & Livestock Australia MD Jason Strong and Mandeville Meat CEO Tim Clarke on "the future of beef in a low carbon economy world". Thomas shared insights on alternative proteins, from consumer trends to investment. He also spoke to the economic and agricultural opportunities that alternative proteins offer, highlighting the need to diversify our protein production with more sustainable options as the global population rises.

Environment & Sustainability

Agriculture & Industry

Health & Nutrition

Alternative Proteins in International Markets



THE PRINCE OF WALES'S
BUSINESS & SUSTAINABILITY PROGRAMME
UNIVERSITY OF CAMBRIDGE INSTITUTE FOR SUSTAINABILITY LEADERSHIP



FOOD INDUSTRY NUTRITION GROUP



CEO Thomas King speaking alongside the Managing Director of Meat & Livestock Australia



MEDIA ENGAGEMENT

As Australia and New Zealand’s think tank for alternative proteins, Food Frontier continues to be the leading source of data and insights used in news coverage of the sector.

Stories in prominent agriculture and business publications allowed us to reach priority stakeholders:

The Daily Telegraph

A taste test of plant-based meats featured an interview with Thomas establishing the economic benefits for Australian farmers

The Sydney Morning Herald

INDEPENDENT. ALWAYS.

Signature story on our nutrition report featured an interview with co-author Teri Lichtenstein, APD

FOOD navigator.com

Interview with our Director of Policy and Government Relations reiterated there is no evidence of consumer confusion around plant-based product labelling as it undergoes another review in Australia

THE WEEKLY TIMES

Story on EU’s vote not to restrict plant-based labelling, featured quotes from our Director of Policy and Government Relations reinforcing a win for ‘common sense approach’

The Farmer

Coverage of the NSW Farmers Alternative Protein Forum and the opportunities for farmers included Food Frontier’s definition of types of meat alternatives as presented at the Forum

ABC Rural

An online story and radio interview with CEO Thomas King unpacked 2020’s top five moments in alternative proteins down under

THE WEEKEND AUSTRALIAN

Q&A profiled Thomas conveying the criticality of protein diversification and opportunities it presents for Australian farmers

Q&A
Thomas King, CEO of Food Frontier, 24

At 18, you were named Victoria’s Young Australian of the Year for your environmental and humanitarian work. How did you, a boy from the Dandenongs, cut through? I was 13 when I launched an awareness campaign about deforestation caused by unsustainable palm oil production, which catapulted me right into the deep end of advocacy – and despite the many challenges, I loved it from the start. Years later I directed communications for a fundraising campaign that raised \$1.6 million that year towards poverty alleviation in Cambodia. I’m proud of these experiences and grateful for them. They cemented my belief in the power of people to drive change when we put our minds together.

The not-for-profit think-tank you founded in 2017 advises industry and government on “future food” issues. Why make this your mission? I came to realise that food and how we produce it, particularly meat, links to almost every issue I’ve worked on, from biodiversity to climate change to food security. Globally, it will be impossible to meet future protein demands relying only on livestock – we need new options that give people their favourite foods with fewer adverse impacts. But you can’t just tell people not to do things. It’s about investing in and championing viable alternatives.

Which means meat grown in a lab, or plant protein that replicates meat? We’re about diversification, exploring all the best innovations, but plant-based “meats” are the immediate commercial opportunity. Cellular agriculture is a bit further off, but when a piece of animal meat becomes available that was made through the cultivation of cells rather than from entire animals. I hope people will be interested to try it.

make a living by farming crops. That means many stand to benefit from the growing demand for plant proteins. I’ve presented to rooms full of farmers, and the ones I’ve met are forward-thinking people, experienced at adapting to changing market and environmental forces, and they monitor the horizon for new trends they can capitalise on. Government needs to support them in those endeavours.

Have militant eco-warriors made your job harder? Most environmentalists I’ve met don’t campaign on the topic of meat. Though there is a growing recognition among environmental groups that meat production often has an outsized footprint – data from the federal Department of the

YOU CAN’T JUST TELL PEOPLE NOT TO DO THINGS. IT’S ABOUT VIABLE ALTERNATIVES



MEDIA ENGAGEMENT

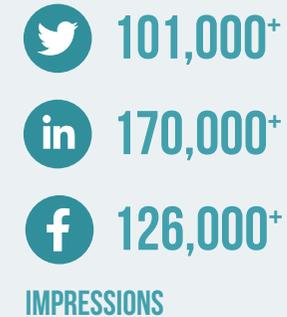
Throughout the year, media stories about alternative proteins provided readers a comprehensive picture of the sector, established by economic and consumer insights from Food Frontier’s reports. We achieved this by partnering with local alternative proteins companies to include these insights in their milestone announcements. Extensive media coverage of these announcements then established or reinforced the scope and potential of the sector, while reaching new audiences with data-filled narratives.

Through coverage of our report launch, organic media opportunities and partnerships in others’ stories, we garnered 12M+ impressions across Australia and New Zealand via:



We shared key stories across our social and owned channels, along with news of global and local developments in alternative proteins, to drive a further 442K+ impressions.

This content reached a follower base that increased primarily amongst our business-focused channels of Twitter (64%) and LinkedIn (59%), with small uptick amongst a more consumer-centric audience on Facebook (5%). This growth was underpinned by our planned social and content strategy, without any paid content engagement.



12M+
MEDIA IMPRESSIONS

We facilitated partnerships,
provided new resources and
advanced export pathways
for a growing sector



SUPPORTING INDUSTRY



SUPPORTING INDUSTRY

SECTOR DEVELOPMENTS

Our work is fostering collaboration, creating connections and providing resources for Australia and New Zealand's alternative proteins ecosystem. From establishing new cross-sector, collaborative partnerships, to providing well-considered resources to address key industry challenges, this work reflects Food Frontier's role as the educator and facilitator at the centre of this ecosystem. We continue to deepen our relationships for greater impact when delivering knowledge and advice to local entrepreneurs and the retailers and agricultural leaders engaging with the sector. We furthered our capacity to do so this year with the hire of a new role, Head of Industry Engagement.

FOOD INDUSTRY INITIATIVES

Industry forums

Facilitating engagement, knowledge-building and problem-solving within the local alternative proteins ecosystem is an essential role Food Frontier plays to accelerate the industry's growth. In August, we hosted our third industry roundtable as a forum to learn, network, discuss shared challenges and explore sector-wide opportunities. The 35 attendees representing almost all domestic plant-based meat companies also heard expert advice from guest speakers on regulatory considerations, export opportunities and local ingredient processing.

In a post-event anonymous survey, all participants reported that having attended the roundtable, they are now more likely to participate in cross-sector discussions with industry peers. They also unanimously agreed that 'Food Frontier plays an essential role in supporting the growth of the sector.'

100%
AGREEMENT ABOUT FOOD FRONTIER'S ESSENTIAL ROLE



To deep dive on key discussions from the roundtable, Food Frontier established two focus groups – one on exporting and one on ingredients procurement. The first meeting focused on relevant export issues such as IP protection, international trade contracts, export markets, in-market intelligence needs and consumer research, with contributions from CSIRO and Austrade. We will continue to offer these problem-solving forums in the future.

Direct industry engagement

Our direct engagement with companies across the alternative proteins ecosystem involved providing advice and guidance on press releases and PR engagement, retailer relationships, talent recruitment, sustainability plans, import and export opportunities and innovation projects, as well as introducing them to prospective investors, partners and

suppliers. As both of Australia's national grocery retailers continue to build and improve their meat alternative offerings, Food Frontier continued to deliver insights on the industry to their category managers and product developers.

65+ INTRODUCTIONS BROKERED

We also connected with stakeholders working tangentially to the industry, from academics exploring research opportunities to analysts tracking market developments to policymakers considering investments and regulation. In total, we conducted 175+ meetings and conversations and brokered 65+ introductions supporting the sector.

Advisory consultations

We participated in stakeholder consultations for an Australian Institute of Food Science and Technology research report produced by RDS Partners exploring the growth potential of Australia's food manufacturing sector, as well as a Food Innovation Australia Limited (FIAL) report produced by KPMG. The FIAL report will guide creation of industry-designed and led roadmaps for 19 distinct growth opportunities to double the size of Australia's food and agribusiness sector by 2030.



SUPPORTING INDUSTRY

Company directory & resources

To provide a comprehensive overview of the local alternative proteins ecosystem, we created and published on our website a directory of plant-based meat and cellular agriculture ventures across Australia and New Zealand. This will serve as a useful, at-a-glance resource for retailers, investors, media and other industry stakeholders that hasn't previously existed. We've begun developing more industry-centric resources to be published on our website next year to further Food Frontier's role as the go-to for local industry knowledge.



I seem to say this every month, but the tide is turning and the message on the merits of plant-based meat is getting through. Food Frontier contributes to every conversation we have every day, and we're so grateful for the continued thoughtful and impactful work you all do!

Andrew May
Chief Growth Officer



AGRICULTURE AND R&D INITIATIVES

Building on the conversation we began in 2019 demonstrating how farmers could capitalise on the growing demand for plant proteins, we furthered our relationships with key agricultural bodies in 2020. This included deeper engagement with the National Farmers' Federation (NFF), as well as engaging the Grains Research & Development Corporation, NSW Farmers and AgriFutures Australia to educate agriculture sector constituents and further understand the opportunities and barriers to achieving the sector's potential.

A future-focused proteins report by AgriFutures included more than 10 mentions of Food Frontier's research findings – an adoption of our data, and our progressive rhetoric, which marked a significant acknowledgment by a major agriculture organisation. The report's tone reflected a shift amongst the agriculture industry towards the more constructive, future-focused and evidence-based narrative we're working to further.



NSW Farmers, Food Frontier and the National Farmers' Federation have today marked the launch of the new national Future of Protein Forum that brings together traditional livestock, plant, and alternative protein producers to meet the projected demand for Australian protein.

NSW Farmers' CEO Peter Arkle said that the Forum would be a great opportunity for protein industries to learn from each other, develop key research and development priorities, and communicate back to producers and governments.

"The global demand for protein in 2030 will be so high that traditional animal agriculture alone will come nowhere near meeting it," Mr Arkle said.

"Alternative protein, such as plant-based products and cell-cultivated meat, will be complementary to our traditional agricultural industries rather than posing a direct threat to their viability.

"We need to ensure that our domestic producers are able to diversify and take advantage of new market opportunities, and that policy and regulatory settings are in place to encourage production and manufacturing in Australia."

Australia has the potential to become a plant-protein powerhouse, by ramping up production to supply plant proteins into key export markets. This potential is furthered as global demand for meat in coming decades will outstrip supply, and as both domestic and international demand for inputs to plant-based meat alternatives increases.

Sam Lawrence, Food Frontier's Director of Policy and Government Relations, said the establishment of the Future of Protein Forum is a critical step in bringing together the Australian agriculture industry and the alternative protein sector for mutual benefit.

Future of Protein Forum

In August, Food Frontier partnered with the NFF and NSW Farmers, the national and New South Wales peak farmers' industry groups respectively, to establish the bi-annual Future of Protein Forum. This forum provides a constructive environment for key industry representatives to explore the agricultural opportunities alternative proteins present. Our aim is to identify collaborative projects, address questions regarding how the primary sector can engage with and benefit from alternative proteins and generate progressive dialogue with decision-makers. The first Forum meeting was held in November and offered attendees insight to major research initiatives under CSIRO and the proposed Pulse Protein Cooperative Research Centre, as well as the country's first major fractionation facility for processing plant proteins.



Pulse Protein Cooperative Research Centre (PP CRC)

Food Frontier became a founding member of the new PP CRC, which aims to accelerate research, investment and innovation in new protein sources, primarily pulses. In Australia, CRCs improve the competitiveness, productivity and sustainability of national industries by helping industry partner with the research sector to solve industry-identified issues. As a founding member, our work will focus on influencing the PP CRC over its 10-year lifespan to support research and innovation focused on the plant-based meat sector. While the PP CRC did not pass its initial 2020 bid to receive government funding, Food Frontier will continue to support its next-round application in mid-2021.



Food Frontier was instrumental in helping NSW Farmers bridge the gap between traditional producers and alternative protein companies. Our collaboration opened the gate for important conversations with the agricultural industry about harnessing complementary opportunities in plant-based protein, and helped many agricultural industry bodies feel more comfortable about the subject.

Aly Bunton
Senior Policy Advisor



Commonwealth Scientific and Industrial Research Organisation (CSIRO): Future Protein Mission

CSIRO, Australia's national science agency, established a Future Protein Mission that aims to help the Australian food industry leverage new protein-related opportunities. We deepened our relationship with their team to share information and insights, as well as explore how Food Frontier can support the Mission while ensuring our efforts are complementary. This included presenting to their Meat 2.0 team, who is assessing avenues for world-class scientists in our region to contribute to the emerging cellular agriculture industry. Our presentation emphasised two critical elements needed to establish Australia as a global leader in cellular agriculture: a broad scope of R&D, and exploring the industry's requirements in fields crucial to commercialisation – food engineering, food science and sensory science.



As CSIRO undertakes our Future Protein Mission to fast track the growth of the Australian protein industry, having Food Frontier as an ally to work alongside is invaluable. It's been great getting to know the team, and we value their industry insights, research findings and collaborative spirit.

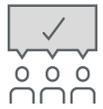
Professor Michelle Colgrave
Future protein lead



We highlighted economic opportunities to governments and ensured common-sense commercial regulation



ADVISING POLICYMAKERS



ADVISING POLICYMAKERS

As Australia's only body representing alternative proteins, Food Frontier has increasingly been called upon to advise governmental organisations and policy-making bodies critical to the success of the sector. Our work has focused on illuminating to governments the economic value of alternative proteins; building partnerships to further investment and R&D; and furthering an evidence-based approach to the sector's regulation.

GOVERNMENT

State Governments

To support state governments interested in taking a lead in Australia's emerging alternative proteins sector, Food Frontier highlighted sectoral opportunities that align with government priorities to stimulate innovation, regional jobs creation and economic growth.

We did this via options papers delivered to the New South Wales and Victorian governments outlining the need for plant-protein supply chain development, cellular agriculture R&D and industry capacity development. This was underpinned by evidence from our consumer demand research with Colmar Brunton and 2030 market projections with Deloitte Access Economics.

In July we co-organised with the Victorian Government's food team a virtual seminar on the alternative proteins sector and its potential at both a national and a state level. We presented to a cross-section of officials, accompanied by presentations from CSIRO and Agriculture Victoria. A presentation of a similar nature was delivered to officials across a number of NSW Government departments including the Department of Primary Industries.

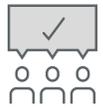
Federal Government

We engaged at the federal level as well, including arranging a series of meetings with both the Department of Agriculture, Water and the Environment and the Department of Industry, Science, Energy and Resources to further relationships and discuss key industry matters.

The Australian federal government also produced a report on meat alternative patents, analysing trends in alternative protein technologies, and drew on statistics and content from Food Frontier's reports to provide context for developments and growth in the sector.



CEO Thomas King and Director of Policy & Government Relations Sam Lawrence in the nation's capital for government meetings



ADVISING POLICYMAKERS

Advancing export pathways

Recognising our position as the nation's leading experts on the alternative proteins landscape, the federal government's Australian Trade Commission (Austrade) called on Food Frontier several times this year to brief their international network, including officers in the U.S., Singapore, Israel and Australian branches. We shared insights on the evolving global and local alternative proteins sector and pointed Austrade's offshore trade representatives towards major opportunities for inbound investment and bilateral commercial partnerships, while explaining domestic industry dynamics that will be critical to consider when assisting Australian companies seeking to export.

We also worked this year to influence the potential emergence of the first free-trade agreements to specifically reference alternative protein products, in an aim to help Australian and New Zealand companies export these products more easily to European markets. Our first submissions on new free-trade agreements called for tariffs on plant-based meat exports to be removed, as well as commodity codes covering future cellular agriculture products to be included, amongst other priorities. We wrote to the Australian, New Zealand and UK governments regarding respective free-trade deals, including with the EU.

REGULATION

Cellular agriculture regulation

As cellular agriculture technology advances, attention is now turning to the end-to-end production of finished food products. Food Frontier is working to ensure the local regulatory landscape can safely enable proteins cultivated from cells to enter the market, just as regulatory authorities in Singapore did at the close of 2020.

To that end, Food Frontier worked closely with an Australian cellular agriculture company to prepare a draft application to Food Standards Australia New Zealand (FSANZ) to test the existing regulatory framework, allowing FSANZ to provide initial feedback and advice ahead of Australia's first official application for a cellular agriculture product in 2021.

The Australia New Zealand Ministerial Forum on Food Regulation, a decision-making body for both countries, is also examining whether additional regulation for cellular agriculture is necessary. We provided materials on cellular agriculture to the Australian Department of Agriculture, Water and the Environment to inform its internal briefing in response.



Cultured meat is such an important breakthrough that needs to make its way to the general public. This understandably involves navigating a complicated regulatory landscape. Food Frontier's hard work, quality advice and guidance along the way has made this journey much simpler for us.

Tim Noakesmith
Founder & CEO



Plant-based product labelling

As 2019 ended, we celebrated the Ministerial Forum on Food Regulation again rejecting proposed restrictions on plant-based product labelling, following our guidance demonstrating that existing labelling is fit-for-purpose. However, continued pressure from the dairy and livestock sectors in late 2020 led the Minister for Agriculture to pursue a new pathway towards labelling restrictions under his department, bypassing the Ministerial Forum.

As the first step in a pre-determined process to seek these restrictions, the Minister convened a roundtable and new working group, for which Food Frontier was invited to represent the interests of the broader alternative protein sector. The roundtable includes heavy representation from the dairy and livestock sectors. We provided evidence illustrating the consumer demand for, and understanding of, plant-based products in the Australian marketplace.

We are consulting with the plant-based alternative industries and will put forward their views in the working group, which is expected to run until February 2021. We will continue to advocate for an evidence-based discussion and leverage our relationships across industries to ensure practical and common-sense outcomes that are in the interests of consumers.

We doubled our team to bring new expertise to our research, operations and industry engagement



GROWING OUR CAPACITY

Food Frontier's ability to drive meaningful change is dependent on hiring the right people whose unique combinations of skill, knowledge and passion will amplify our impact.

In 2020, we hired critical new team members whose expertise across research, content development, strategy, operations and industry have increased our capacity to accelerate growth of the region's alternative proteins ecosystem. New hires included:

- **A Head of Industry Engagement** with nearly 20 years' extensive technical food industry experience to support local alternative proteins companies to grow, and solve shared challenges
- **A Director of Strategy & Operations** with experience in change management and communications across the commercial, NGO and international development sectors to streamline our internal operations and support team-wide strategy implementation
- **A Research & Content Manager** with a communications background and a nutritionist qualification to deepen our research capability and develop new content streams

Our team of six was not at full capacity until mid-Q3, so we're thrilled to see what we can accomplish collectively in 2021 to realise a more future-proof protein supply.



Food Frontier team, December 2020

Special thanks...

Even with the continued expansion of our team, our work in 2020 would not have been possible without the support of many external contributors and experts.

We'd like to extend a special thanks to Teri Lichtenstein, APD, the co-author of our nutrition report.

We also wish to thank our talented volunteers for their valued support this year, including Dr Lucy Fish, Lyn Davies, Dr. Despina Handolias, Siddharth Bhide, Dean Hayden, Kriti Manektala, Johann Lipmann, Michal Klar, Charmaine Ng, William Spencer and Sam Wallace.

ENGAGE WITH US

Our work is made possible through support and engagement with those who share our vision of a safer, more sustainable and diversified protein supply. Interested in shaping the future of food with us?

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DONATE

The generosity of our philanthropic supporters is the reason we exist – every dollar enables us to generate meaningful impact greater than most organisations our size. We welcome gifts via donate.foodfrontier.org or email us at giving@foodfrontier.org.

PARTNER

Reach out to us at info@foodfrontier.org to discuss a potential industry or research partnership, or request a speaker for your upcoming event.

GET INVOLVED

Contribute to our next research publication, operational growth and 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'd like to get involved.

GET DATA & INSIGHTS

Download our free research reports at foodfrontier.org/reports for the latest insights on alternative proteins – from health and nutrition to consumer trends to economic modelling and more.

SUBSCRIBE

Keep up-to-date on the latest developments in alternative proteins via our monthly newsletter – subscribe on our homepage at foodfrontier.org.

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

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