

food  
frontier

8 years of  
impact



# Our story

Today's global food system sustains billions of human lives.

Yet when livestock were first domesticated, fewer than eight million people inhabited the planet. The global population is now a thousand times larger, and growing.

Protein-rich foods account for a significant share of global land use, emissions, and public health risk, while remaining essential to nutrition, livelihoods and economic development.

To diversify our food supply and sustainably feed a growing world, new protein innovations—including plant-based, fermentation-enabled and cultivated proteins—have emerged over the past decade as credible, complementary pathways. Scientific and commercial momentum began building in the mid-2010s, particularly in the United States.

## Building foundations

After meeting with founders, scientists and advocates leading this work in California in 2016, Australian social entrepreneur Thomas King returned home to realise that while momentum was building overseas, there was little coordinated conversation, evidence, investment or institutional engagement around “alternative proteins” in Australia, New Zealand, and the broader Asia Pacific region. He founded Food Frontier to help close that gap.

From the outset, Food Frontier's role was not to commercialise products or advocate for a single solution, but to build the conditions for informed, accelerated progress. As an independent think tank funded by grants and donations, Food Frontier has worked to mobilise stakeholders around sound evidence, practical dialogue, and cross-collaboration—helping industry, government, researchers and the broader agri-food system understand where new proteins fit within a resilient future food system.

## Catalysing change

Over the last eight years, Food Frontier has led and delivered a body of work that has helped shape the field in Australia and New Zealand, including:

- the **first economic modelling** of the plant-based meat sector in Australia, which became widely referenced across government, industry and media
- **global-first and nationally significant research** on the health, nutrition and labelling of plant-based meats
- sustained **policy and regulatory engagement**, contributing evidence to many government consultations, publications and investments
- the **AltProteins Conference**, the region's premier forum dedicated to alternative proteins, convening stakeholders across industry, research and government
- extensive **ecosystem facilitation**, connecting thousands of companies, policymakers, researchers, industry organisations and investors at critical moments of sector development
- a consistent, evidence-led **media and public narrative** that helped move alternative proteins from novelty to mainstream consideration.

Over this time, the landscape changed markedly. What began with just a handful of companies grew into a sector of more than 40 businesses. Investment grew considerably. Media coverage expanded in scale and sophistication. Governments began commissioning research, consulting on regulation and investing in enabling infrastructure. New products entered retail and foodservice and alternative proteins became embedded in national conversations about agriculture, manufacturing, climate and food security.

## Sustaining momentum

Food Frontier is proud to have helped seed or accelerate many advancements across this field. Progress has not been linear, and the ecosystem today faces new and complex challenges. Yet as this report reflects, it has been a remarkable eight years of collective impact—the conditions created, the momentum built and the foundations now in place to support the sector's next phase.

As Food Frontier enters an exciting new chapter through partnership in 2026—creating a stronger, unified vehicle for change—this work continues: building on the learnings, partnerships and impact of the last eight years.



# Our impact in numbers

Over eight years, Food Frontier worked across research, policy, industry engagement and public discourse to help build critical foundations for the alternative proteins ecosystem in Australia and New Zealand.

These figures reflect Food Frontier's trust, relevance and influence sustained over time—from evidence shaping government actions, to industry connectivity unlocking faster progress, to narratives shaped in the public domain.

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## Industry engagement and facilitation

# 27,697

**audience members reached on stage, 1,646 direct engagements and 417 targeted introductions.** We facilitated information exchange, dialogue and partnership with and between government, industry, academia and venture capital; presented at major agri-food, innovation and investment events here and across the globe; and partnered on research, events and media engagement with national authorities on food, agriculture, science and policy, including Woolworths, Compass Group Australia, CSIRO, National Farmers' Federation, Austrade, the New Zealand Government, Victorian and NSW State Governments and Climateworks Centre.

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## Policy and government

# 140+

**inclusions of Food Frontier research or recommendations in state and federal government papers, and applications that secured millions in government funding.** We participated in submissions and hearings for more than 30 government inquiries and consultations, and held extensive direct engagements with government officials and agencies. Our research and advocacy saw alternative proteins embedded in policy discussions across manufacturing, innovation, trade, science and innovation, regulation, health and climate, and featured in applications that successfully secured millions in research grants and a nine-figure government infrastructure commitment.

## Research, data and insights

# 25,440

**direct downloads of Food Frontier research and resources across more than 30 publications,** spanning economic modelling, export market analysis, consumer insights, nutrition comparisons, research capabilities, labelling analysis and sector mapping. These insights significantly informed national media reporting, corporate strategies, investor deal flow and government policy and investments.

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## Ecosystem development

# 2,080

**attendees from Australia, New Zealand, Asia and the world at Food Frontier events,** including four major AltProteins conferences that became the largest of their kind in the southern hemisphere, bringing together hundreds of government officials, corporate executives and agri-food leaders with pioneering founders, researchers and investors. These events fostered an estimated 3,000–4,000 new connections, and resulted in new business partnerships, investments, research projects, policy dialogues and increased plant-based product procurement.

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## Narrative and media

# 101 million

**media impressions across television, print, radio, podcasts and online media referencing Food Frontier research, data and commentary.** This included coverage across ABC, News Corp, Nine Entertainment and Seven West Media outlets that helped shift public discourse toward more evidence-based conversations on alternative proteins and their impact on economics, agriculture, consumers, health and sustainability. Further, we regularly disseminated information to our most engaged audiences, including over 11,700 social media followers and 7,000 e-subscribers.

# From emergence to expansion

## Seeding a field

When Food Frontier began, alternative proteins were largely absent from mainstream food, agriculture and policy conversations in Australia and New Zealand. Early work focused on sparking informed dialogue and establishing credibility: clarifying what alternative proteins are, how they are produced and why they matter within a diversified protein future.

During this phase, Food Frontier led foundational work including Australia's first independent economic modelling of the plant-based meat sector, early consumer research and initial sector mapping. These insights provided shared reference points for policymakers, media and industry and were repeatedly drawn on as the category began to emerge.

Alongside this research, Food Frontier convened early cross-sector conversations—bringing together companies, researchers, agricultural stakeholders and government representatives who had never convened around the same table to discuss new protein opportunities. The emphasis was on evidence, insight from other markets and how alternative proteins can complement existing food and farming systems.

## Establishing legitimacy and scale

As the ecosystem expanded, Food Frontier's role evolved from sense-making to active education and facilitation.

This period included cornerstone initiatives such as nationally significant nutrition and labelling research, sustained engagement in policy and regulatory processes and the launch of structured industry forums to address shared challenges. Media demand for credible, local insights increased sharply, with Food Frontier data and commentary informing a large portion of all sector coverage.

Food Frontier also began convening industry, government and investors at scale, including through the inception of the AltProteins Conference, which quickly became the region's premier forum on alternative proteins. Engagement with governments deepened, with Food Frontier contributing evidence to consultations, inquiries and government-commissioned work across regulation, trade and research investment.

By this stage, alternative proteins were no longer fringe. They were increasingly present across supermarket shelves, menus, and national conversations about manufacturing, agriculture, climate and food security.

## Embedding change and combining forces

In recent years, the focus shifted again—from building momentum to ensuring durability.

As the ecosystem diversified and navigated new headwinds, Food Frontier increasingly concentrated on high-leverage research, policy influence and institutional engagement. This included delivering flagship reports on sovereign capability, food security and sustainability; shaping multiple federal inquiries and reports; and catalysing a successful corporate and academic research co-bid focused on national foodservice.

This period also prompted reflection. Advancing systemic change in a complex and contested space is not linear, particularly for small organisations with broad mandates. With more capable actors now active across research, industry and government, Food Frontier chose to enable our future program delivery through a partner merger in 2026—a move we believe will consolidate progress and amplify long-term mission impact.

This next phase will build on what has been established: stronger evidence, deeper relationships and a more resilient ecosystem positioned to carry this work forward through partnership.

2018

**4 companies** in alternative proteins across Australia and New Zealand.

**<80 products** in the Australian retail market.

**3 known government authored or funded papers** feature alternative proteins.



2019

Plant-based meat **retail sales grow 46%** in Australia in one year.

Plant-based meat **products doubled in Australian supermarkets** in one year.

2020

**3 in 5 consumers** in Australia and New Zealand have tried or are interested to try meat alternatives.



2021



2022

2023

**40+ companies** in alternative proteins across Australia and New Zealand.

**>300 products** in the Australian retail market.

**A\$204m invested** in plant-based meat businesses between 2020-2023.

Australia becomes the **4th top market globally for cellular agriculture** based on deal count, and 5th for cell-ag investment with US\$176m / A\$255m raised.



2024

2025

**At least 36 government authored or funded papers** feature alternative proteins.

Australia becomes the **4th country globally** to approve cultivated meat for sale.

2026



# Take a deep dive into our five programmatic areas

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# Research, data and insights

## *Building the evidence base for a new protein future*

From the outset, Food Frontier recognised that the success of alternative proteins in Australia and New Zealand would hinge on informed understanding and credibility. In a highly contested space—intersecting food, farming, health, climate and trade—progress would depend on robust, locally relevant evidence that could withstand scrutiny and inform dialogue and decision-making.

Across this program area, Food Frontier developed and delivered more than 30 research publications downloaded over 25,000 times and distributed even further. These publications spanned economic modelling, market insights, nutrition comparisons, labelling analysis, consumer insights and export market research, and included several first-of-their-kind research projects. Together, this work helped establish a shared evidence base that informed corporate decision-making, government policy and media coverage reaching tens-of-millions of consumers.

# 01

## Economic modelling and state of the industry reports



One of Food Frontier's earliest and most influential contributions was leading the first independent economic modelling of Australia's plant-based meat sector, undertaken in partnership with Deloitte Access Economics. At the time, public discussion of alternative proteins was largely speculative. This work fundamentally shifted the conversation by quantifying the sector's size, growth potential, employment impacts and value-

creation opportunities across the agri-food supply chain, including economic benefits to regional Australia.

The modelling was undertaken at three separate points and formed the centrepiece of Food Frontier's State of the Industry reports released over multiple years. These reports provided a comprehensive snapshot of the sector's evolution—tracking company growth, investment trends, product availability and emerging opportunities—and quickly became a go-to reference for decision-makers.

These were downloaded by thousands of stakeholders and circulated further, cited in government briefings, agri-food industry reports and investment analysis and widely covered by national media including ABC, Australian Financial Review, Herald Sun and Business Insider. The insights enabled deeper corporate and policy engagement, more informed investor due diligence and constructive debate about how alternative proteins could complement existing agri-food systems.

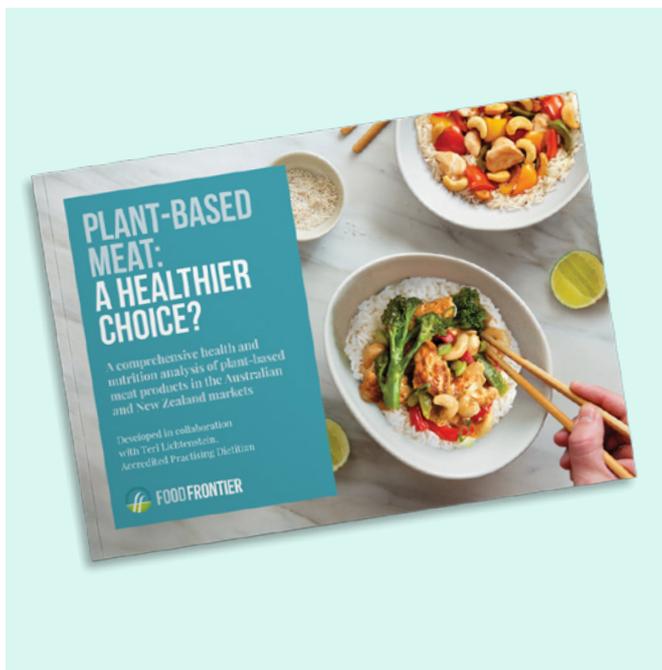


## Nutrition and health analysis

As plant-based meat products began appearing in Australian supermarkets in greater numbers, questions about their nutritional value and health impacts intensified. In response, Food Frontier led globally first and nationally significant nutrition analysis on the nutritional composition of plant-based meat products available in supermarkets, alongside equivalent conventional meat products.

This work addressed a critical evidence gap at a pivotal moment. It provided health professionals, policymakers and consumers with clear, data-driven insights, countering misinformation and oversimplified claims that weren't based on accurate like-for-like comparisons.

The findings attracted substantial print, television, radio and online national attention, including two-minute-long TV stories on 9 News and 7 News. By grounding the conversation in data and evidence, Food Frontier helped elevate the quality of public discourse and reinforce the importance of nuanced assessment of emerging protein categories.



## Export market analysis

As Australia's alternative protein sector matured, Food Frontier identified export as one of the most critical—and least well understood—growth pathways. While global interest in alternative proteins was accelerating, Australian companies lacked detailed, market-specific intelligence to identify and navigate the most promising in-roads into Asia, the world's most populous region at our doorstep.

After publishing a series of export market profiles in 2021, Food Frontier went on to produce an extensive 180-page export market insights report profiling five of the most promising markets in Asia for Australian and New Zealand alternative protein exports. The report delivered deep in-market consumer research, category analysis and retail and regulatory insights undertaken with top market intelligence firm Mintel, and supported by New Zealand's government-funded food and fibre think tank, Te Puna Whakaaronui.

This work represented one of the most detailed export-focused analyses of alternative proteins in the region, and was used by companies to inform market entry strategies and by government and trade bodies to understand export readiness.



## Why this work mattered

Food Frontier's research and insights program changed the baseline, providing credible data and shared reference points to counteract uncertainty, speculation and fragmented narratives. Where alternative proteins were previously dismissed or misunderstood, they became recognised for their commercial, economic, and nutritional potential.

This evidence base continues to underpin discussions across government, industry and the broader food system—forming a durable foundation for the next phase of the sector's development.



# Policy and government engagement

## *Advancing evidence-based policy and regulation*

From inception, Food Frontier recognised that the trajectory of alternative proteins would be shaped not only by innovation and investment, but by how governments understood, regulated and backed the sector. In a space intersecting food regulation, agriculture, trade, health and climate policy, early decisions carried the risk of missing opportunities for long-term value creation.

With this understanding, Food Frontier invested heavily in policy and government engagement, positioning itself as a trusted source of independent, evidence-based analysis to enable informed decision-making.

Across hundreds of direct engagements with federal and state departments and agencies, and participation in more than 30 government consultations and hearings, Food Frontier briefed officials across all key portfolios and saw our work inform government policies, investments and parliamentary debates, with Food Frontier research and recommendations appearing more than 140 times across government papers.

# 02

## Federal and state submissions and consultations

Over eight years, Food Frontier engaged extensively with governments across Australia and New Zealand, contributing submissions and evidence to consultations and inquiries spanning agriculture, health, trade, industry, science and climate. These engagements addressed topics including:

- food standards and labelling
- research and innovation funding
- manufacturing and industry development
- trade and export policy
- sustainability and climate frameworks

Food Frontier's submissions and testimony combined quantitative analysis with practical policy insight, drawing on economic modelling, consumer research and international evidence. Departments often used Food Frontier's work to inform internal briefings and ministerial advice.

Food Frontier helped ensure alternative proteins were considered within mainstream policy frameworks, rather than treated as a niche or ideologically driven issue.



## Government research, recommendations and investments

The policy impact of Food Frontier’s research, submissions, and hundreds of direct government engagements can be seen in our influence on government’s positions, engagement with the sector, and positive inclusion of alternative proteins in government-authored and government-funded publications. Examples include:

- **Federal and state government investment commitment (2022):** Food Frontier’s economic modelling and sector analysis informed the business case for an application that secured \$178m in government commitments for plant protein processing in South Australia.
- **CSIRO’s national roadmaps (2022-23):** Australia’s national science agency included alternative proteins as part of both its national future food roadmap and national protein roadmap, referencing Food Frontier’s research.
- **Western Australia Parliamentary Inquiry (2024):** Food Frontier research formed a substantial part of the evidence base for the WA Education and Health Standing Committee’s inquiry and subsequent paper into how alternative proteins could improve dietary and planetary health.
- **Climate Change Authority advice to the Federal Government (2024):** Following repeated engagement and data sharing with the Climate Change Authority, alternative proteins were included in the Authority’s official review and advice to the federal government on technology transition pathways and emissions reduction options.
- **Federal Food Manufacturing Inquiry (2025):** Our submission and testimony to the Federal Parliament’s inquiry into food and beverage manufacturing informed their Food for Thought report, which widely references our contributions and includes recommendations closely aligned with our advocacy.



## Senate Inquiry into labelling

One of the most high-profile and contested policy moments for the sector emerged through a Senate Inquiry targeting alternative protein products, with a focus on labelling. In an environment characterised by heightened rhetoric and misinformation, Food Frontier played a central role in grounding the debate in evidence.

Food Frontier led a comprehensive, quantitative analysis of plant-based meat labelling practices across the Australian retail market, examining over 250 products to assess clarity, consistency and consumer understanding, with evidence countering the Inquiry’s primary claims. Our founder presented these findings at a Senate Inquiry hearing and responded to questioning.

This analysis was widely referenced during the inquiry process and helped shift the tone of the debate away from anecdote and toward evidence. Our work and recommendations featured significantly in the final report, reinforcing the case for proportionate, evidence-based action, and ultimately helped avoid the introduction of unnecessary heavy-handed regulation.

## Why this work mattered

Policy settings established during a sector’s early development can shape outcomes for decades. Food Frontier’s sustained engagement helped ensure that alternative proteins were met with informed dialogue and decision-making, and that opportunities for innovation, manufacturing and export were considered alongside risk management.

By acting as a credible intermediary between emerging industry, established institutions and government decision-makers, Food Frontier contributed to a policy environment better equipped to support thoughtful, evidence-based progress. This work also demonstrated a broader lesson for systems change: that independent, trusted analysis can play a decisive role when new technologies intersect with contested public debates.



# Ecosystem development and capacity building

## *Building platforms for connectivity and coordination*

As Australia and New Zealand's alternative protein ecosystem began to emerge, Food Frontier identified a structural risk: without shared forums, coordination mechanisms and long-term research platforms, progress would remain fragmented and vulnerable to shifts in funding, politics, public sentiment or market conditions.

Knowing this, we chose to create spaces and support structures that enable coordination and continuity beyond any single organisation. This included hosting major events attracting over 2,080 attendees, supporting industry coordination, and embedding alternative proteins into long-term research and collaboration platforms.

# 03

### **AltProteins conference**

Food Frontier founded the AltProteins conference, the first large-scale, dedicated forum for alternative proteins in Australia and New Zealand, and delivered it across four years with continued state government and corporate sponsorship.

AltProteins became the region's premier conference on alternative proteins and the largest of its kind in the southern hemisphere, and by its third year it featured over 40 speakers from 11 countries and attracted senior representation from across industry, government, research, agriculture and finance.

Speakers included government officials, multi-national corporates, leading researchers, founders of innovative early-stage companies, and leading global philanthropic organisations such as Bezos Earth Fund and the Global Alliance for a Sustainable Planet.

AltProteins played a formative role in normalising alternative proteins within mainstream food and agriculture conversations, accelerating relationship-building across traditionally siloed sectors, and signalling to policymakers and incumbents that the sector had become established and investable.

Participant feedback consistently reflected the conference's impact, including 93% of attendees across the four conferences reporting making 'new, useful connections', mostly 3-6 or more, with an estimated total of 3,000-4,000 useful connections made.

For many stakeholders—particularly those from government, agriculture and large food companies—AltProteins represented their first sustained, evidence-led engagement with alternative proteins in a professional, policy-relevant setting.





## Research platforms

Food Frontier has also played a key behind-the-scenes role in embedding alternative proteins within long-term research, education and collaboration platforms, supplying data, insights and advocacy support to multiple Cooperative Research Centre (CRC) bids, Australian Research Council (ARC) initiatives, and other key projects. These include:

- catalysing a co-bid that secured AU\$500k in federal funding for an ARC Industry Fellowship Grant, working with key corporate and academic players on increasing uptake of sustainable proteins in foodservice.
- contributing to the development of the Alternative Proteins CRC bid, involving 70+ universities, research institutes, government, businesses and other partners seeking to commit a combined \$270M in resourcing.
- partnering with STILE Education to introduce cell-cultivated meat curriculum materials into secondary science classrooms, reaching over 250,000 students in one quarter of Australian schools.
- producing freely available researcher databases and engaging closely with research centres and accelerators like the Food and Beverage Accelerator (FaBA) initiative.

By helping integrate alternative proteins into established research, innovation and education frameworks, Food Frontier supported a shift from siloed, ad hoc projects to integrated collaboration.

## Alternative Proteins Council

In 2021 as the industry matured, Food Frontier led the establishment and subsequent spin-out of the Alternative Proteins Council (APC), enabling industry-led coordination on shared regulatory priorities.

Chaired by Nestlé Australia and comprising a range of small, medium and large businesses, the APC was designed to provide companies producing alternative protein technologies and products with a collective platform to align on shared challenges and interests, engage with government and regulators, and coordinate sector-wide action.

Food Frontier incubated the APC and its structure before transitioning it to Australian Industry Group to lead the secretariat function and establish a formal membership model that continues today.



## Why this work mattered

Infrastructure is often invisible when it works well. Yet without trusted forums, coordination mechanisms and platforms for critical dialogue and networking, emerging sectors can struggle to progress beyond early momentum. Food Frontier's investments in seeding forums and co-investment projects has helped move the alternative proteins ecosystem from fragmentation toward greater coherence.



# Industry engagement and facilitation

## *Unlocking progress through relationships, partnerships and forums*

Food Frontier had significant influence among industry and incumbents at moments when clarity and context were critical. As an independent, non-commercial organisation, Food Frontier has operated as a trusted intermediary –facilitating dialogue, introductions and evidence-based insight to start-ups, major manufacturers, retailers, foodservice providers, investors, agricultural representatives and supply-chain actors navigating a rapidly evolving category.

Across this program area, we spearheaded partnerships, convened industry forums, briefed major institutions, presented at events totalling more than 25,000 audience members, and made over 400 targeted introductions that supported collaboration, co-investment and problem-solving.

# 04

## Corporate engagement

As more alternative protein products became available on the market, Food Frontier increasingly engaged large corporate institutions and investors who sought credible, independent insight into this fast-evolving category. This included delivering briefings and participating in events with national retailers Woolworths and Coles, foodservice giant Compass Group Australia, leading chef training institute William Angliss, major FMCG manufacturers, and venture capital firms.

Such events included our founder participating in an on-stage interview with Howard Schultz, Executive Chairman of Starbucks, asking him about the company's plans to expand plant-based offerings before an audience of hundreds of leaders in food production, procurement, and policy.

In 2019, he joined executives on stage from Australia's largest grocery retailer, Woolworths, speaking to approximately 2,500 staff across buying, merchandising and customer-facing teams. At a time when alternative protein products were still new to many consumers, this briefing provided staff with critical context on emerging products, customer demand demographics, and effective in-store merchandising.

In 2023, we partnered with Compass Group Australia, the country's largest institutional caterer, to convene an industry event with manufacturers and suppliers focused on expanding alternative proteins in large-scale foodservice and better menu integration, chef education, and consumer messaging.

Early on, we also convened an Investor Pitch Night, connecting alternative protein startups with venture capital and impact investors at a formative stage of ecosystem development, and supporting early dialogue between founders and the investment community.





## Industry roundtables and focus groups

Each year Food Frontier facilitated several roundtables and thematic focus groups, bringing together alternative protein companies—mostly start-ups and SMEs—along with other ecosystem players, to address shared challenges including export readiness, ingredient supply, regulatory navigation and consumer communication.

These forums provided a space for candid peer-to-peer discussion, collective problem-solving, alignment on shared priorities, and opportunity to engage with guests from major retail, foodservice, academia, government, and trade.

Participants consistently cited these forums as valuable spaces for sense-making during periods of rapid change, helping move the ecosystem from isolated company-level action toward greater coordination and maturity.

## Partnerships and strategic introductions

Food Frontier also focused on building strategic partnerships and facilitating introductions across industries. We worked closely with trusted national institutions to align on shared objectives and reinforce evidence-led narratives.

We collaborated on research, events and media engagement with national authorities on science, food, agriculture and policy, including CSIRO, National Farmers' Federation, Austrade, the Victorian and NSW State Governments, Climateworks Centre, Food & Wine Victoria, Australian Institute of Food Science and Technology (AIFST) and the Australian Foodservice Advocacy Body (AFAB), among others. These collaborations helped position alternative proteins within established conversations about food systems, agriculture, manufacturing and trade.

Food Frontier served on the steering committee for the leading Asia Pacific agrifood event Global Table and led the alternative proteins programming track. The event convened over 3,000 delegates from 29 countries, attracted millions in government funding, and featured speakers including former US Secretary of State, John Kerry. We also presented at various conferences totalling more than 25,000 audience members.

Over the years our team directly brokered over 400 targeted strategic introductions between companies, investors, researchers, retailers and policymakers. Together, these connections strengthened the sector's connective tissue, supporting more integrated and mainstream engagement across Australia's food and agriculture landscape.



## Why this work mattered

Emerging sectors do not advance through reports alone. Progress depends on relationships, trust and the ability to connect the right people at the right time.

Food Frontier's industry and ecosystem facilitation reduced friction across the system, accelerated learning, and enabled increased collaboration. By operating as an independent intermediary, Food Frontier was able to influence at points of leverage, supporting progress that extended well beyond our visible outputs.



# Narrative, media and public discourse

## *Shaping awareness, understanding and attitudes*

From the beginning, Food Frontier recognised that progress in alternative proteins would depend not only on innovation, policy and investment, but on how the category was understood and discussed.

Food Frontier established itself as a go-to source for outlets covering alternative proteins due to our independence, broad knowledge and evidence base, and ability to contextualise global developments for Australian audiences. This included local, state, national and international coverage across ABC, News Corp, Nine Entertainment and Seven West Media outlets, totalling more than 101 million impressions.

Across this program area, our work helped shift public discourse on alternative proteins away from novelty and polarisation, toward more mature, evidence-based conversations about economics, health, agriculture, sustainability and the future of food.

# 05

## Economic and industry legitimacy

Some of Food Frontier's most influential narrative-building moments came through the release of our economic modelling and State of the Industry reports. At a time when alternative proteins had received limited coverage and were often framed as niche, these reports provided journalists with credible, locally grounded data that enabled more substantive national coverage.

Food Frontier's analysis featured prominently across national outlets including ABC, The Australian, Australian Financial Review, Guardian Australia and major industry publications, and saw an increased focus on emerging protein industries' value to manufacturing, job creation, regional development and the broader food economy. This included a national ABC TV news live-cross on the back of our 2020 report release.

Coverage frequently drew directly on Food Frontier's figures and framing, positioning alternative proteins alongside other serious manufacturing and agri-food sectors rather than as a fringe trend. This shift in narrative was reinforced by the downstream uptake of the same data in government briefings and policy discussions, creating alignment between media, industry and institutional discourse.

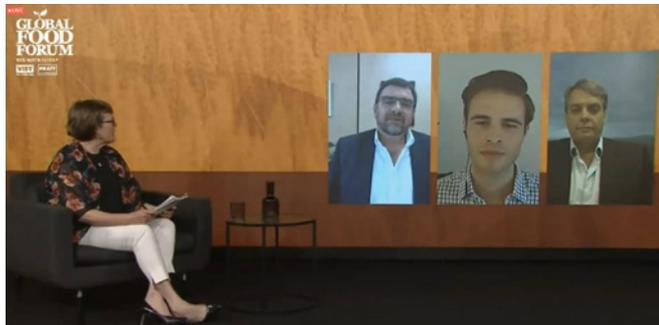


## Health, nutrition, sustainability and labelling

Another defining area of narrative influence related to raising the evidentiary floor on alternative proteins in relation to health, nutrition, sustainability and product labelling, where debate was often highly polarised and poorly informed.

Food Frontier's nutrition research and national labelling analysis provided journalists and commentators with clear, accessible evidence at moments of heightened scrutiny. In particular, during the Senate Inquiry into plant-based meat labelling, Food Frontier's data was widely referenced in media reporting, reflecting a shift from rhetoric to more nuanced, balanced, and informed reporting.

Rather than amplifying controversy, our media engagement helped elevate the standard of discussion.



## Farmers, agriculture, and regional Australia

Food Frontier focused heavily on ensuring alternative proteins were discussed credibly within agricultural contexts. Frequently featured in rural and agricultural media outlets, including *The Weekly Times* and *Farm Online*, as well as on stage at industry forums, our data and voice helped bring greater nuance to conversations that were often polarised.

In 2020, Food Frontier's founder joined senior livestock industry executives on a high-profile panel at the Global Food Forum, convened by *The Australian* in partnership with *The Wall Street Journal*, providing evidence to balance discussions about sustainable protein and the future of food production.

We also partnered with the National Farmers' Federation (NFF) and NSW Farmers to establish the bi-annual Future of Protein Forum, launched in a joint press release in 2020. The Forum offered a constructive space for established and emerging protein producers to explore the place for new protein options in Australian agriculture.

In addition, Food Frontier presented at a range of producer-facing events such as Hort Connections, Australia's largest horticulture conference, and we featured prominent producers through our platforms to highlight our proactive engagement with farmers, including former NFF President David Jochinke speaking at our inaugural AltProteins conference.



## Why this work mattered

Narratives shape policy, investment and public acceptance. By improving the quality of public discourse, Food Frontier helped create conditions for more informed decision-making across government, industry and the broader food system.

Rather than seeking to dominate media attention, Food Frontier focused on improving the conversation—ensuring that alternative proteins were assessed on evidence, discussed in context, and understood as part of a complex, evolving food landscape.

This work amplified the impact of our research, policy and ecosystem engagement, extending our influence well beyond individual publications and media cycles.



# A new chapter starting in 2026

Over eight years, Food Frontier has helped to move alternative proteins in Australia and New Zealand from the margins to the mainstream, with impacts felt across fields, factories, labs, boardrooms, and ultimately, dinner tables.

Together with you, we have generated evidence where there was none, shaped narratives once absent from public dialogue, and helped build supportive foundations for an emerging sector that is now firmly part of our region's food future.

Our move to join forces with our long-standing partner Cellular Agriculture Australia (CAA) in 2026 is, at its heart, an impact decision. Our integration with CAA combines our core capabilities into one unified, expanded organisation, while enabling our mission, programmatic priorities and evidence-led approach to continue. Our combined teams will work towards introducing a new organisational positioning and brand in late 2026—one that will be better placed to meet the needs of the next eight years.

This means the momentum that you have helped create through Food Frontier's work will carry forward and continue to inform policy, guide investment, support researchers, and connect industry across the alternative protein ecosystem.

The work is not finished. Global and regional food systems still face profound challenges, and the path for alternative proteins remains uneven. But the landscape is materially different from when Food Frontier began. There is now a community of companies, researchers, investors, policymakers, farmers, chefs and advocates who understand what is at stake and what is possible—and Food Frontier's contribution to that shift has only been possible because of you.



## With gratitude

This report is, above all, a thank you.

### **To our philanthropic partners and major donors**

Thank you to the foundations, trusts, and individual and family donors who backed Food Frontier's vision early and stayed with us through periods of growth and sector headwinds. Your multi-year support, catalytic grants and flexible funding has and will continue to allow us to invest in ambitious research, policy engagement and convening work that would not have been possible otherwise. You took a risk on a then-nascent field, which has since helped shape an enduring legacy.

### **To our government, policy and public sector partners**

We are grateful to the many public servants, advisors and elected representatives at federal, state and territory levels who engaged with our research and perspectives in good faith. Thank you for inviting Food Frontier into inquiries, consultations, roundtables and informal discussions, and for the many ways you considered and reflected our data and analysis in government strategies, reports and advice.

### **To our research and education collaborators**

Thank you to the universities, research institutes, national agencies and education partners who worked with us to deepen the evidence base, explore new questions and bring alternative proteins into research labs and classrooms. Your collaboration ensured this work was grounded in robust methodology and connected to the next generation of researchers.

### **To industry, agriculture and ecosystem partners**

We are indebted to the entrepreneurs, company leaders, investors, farmers, peak bodies and foodservice and retail partners who opened your doors, shared your insights and worked with us to explore what a more diverse protein landscape could look like.

Thank you to the alternative protein companies who trusted us with sensitive data; to the established food and agriculture organisations who engaged constructively; and to the many businesses who participated in our projects and events.

### **To our allies and fellow advocacy organisations**

Thank you for bringing complementary expertise, for challenging and refining our thinking, and for working alongside us to highlight the health and environmental imperatives for protein diversification. Our collective impact has been far greater than any single organisation could have achieved alone.

### **To our Board, staff and alumni**

Food Frontier's work has been powered by a small, extraordinarily committed team and a Board that provided wise counsel, governance and support through both growth and transition. Thank you to our current and former staff, contractors, interns and volunteers for your creativity, rigour and care; and to our Directors and advisors for your stewardship and belief in the mission.

### **To everyone who engaged with our work**

Finally, thank you to the thousands of people who read our reports, cited our data, attended our conferences and webinars, invited us to speak, responded to our surveys, or simply shared an article or insight with a colleague. You have helped carry these ideas into boardrooms, farms, laboratories, kitchens, classrooms and community conversations across Australia, Aotearoa New Zealand and beyond.

# Help us grow a better tomorrow

For eight years, Food Frontier has operated as the independent think tank on alternative proteins in Australia and New Zealand—driving informed dialogue and decision-making to expand our region's protein supply with sustainable, nutritious options.

This work has been made possible by the generosity of our donors.

While our operating model will evolve in 2026, the impact you have helped create—the research, relationships, norms and narratives we have built together—will continue to shape the future of food in our region.

Together with our colleagues at CAA, we look forward to carrying this work forward with you.

To support the next phase of this work through a tax-deductible donation, please get in touch.



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