



# Future of Food report

Snapshot

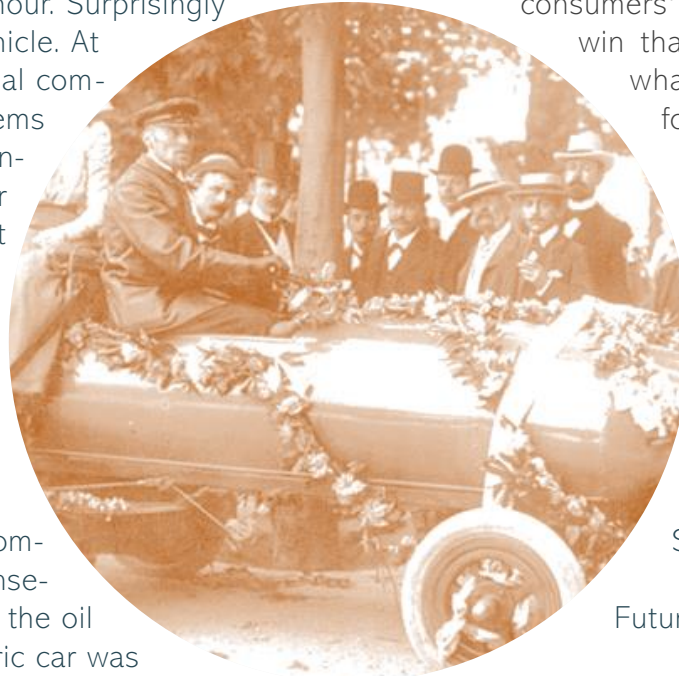


Edition 1, juli 2019

# Preface

On April 29, 1899, the Belgian Camille Jenatzy drives a whopping 105.88 km/h with his 'Jamais Contente' ('never satisfied'). It is the first time that a vehicle has exceeded the limit of 100 kilometers per hour. Surprisingly enough (with today's knowledge) it is an electrical vehicle. At that time there is a battle going on between the internal combustion engine and the electric one. And electricity seems to be winning this battle just before the turn of the century. For example, 'De Kampioen' writes in the summer of 1898: "It is foreseeable that the means of transport of the future will mainly be moved by electrical power." Electric cars are mechanically more reliable and much more comfortable than cars with internal combustion engines. The car shakes less, makes much less noise and the passengers are not faced with exhaust fumes.

Reality turned out differently, in favor of the internal combustion engine. With, we now know, quite negative consequences for our world and favorable consequences for the oil industry. Why did electric lose? The range of the electric car was too small and the speed, due to the heavy batteries, too low. Technological developments of the electric option went too slowly to meet two simple consumer needs: speed and range.



At this time, another battle is going on. Between food that is good for the world and food that is less good for the world. The option that best meets consumers' requirements will win. And if we want the option to win that is better for the world, we will need to understand what is moving or holding back consumers when making food choices.

That is why we founded the Future of Food Institute. Brands that understand the consumer, understand their motives and barriers are the winners in sustainability. Insight is needed to make an impact. Inspiration, ruler, stick to hit, crystal ball. We hope that this report will contribute in many ways to accelerating the food transition towards a sustainable world.

Simone Lamers & Durk Bosma

Future of Food Institute

# About the research

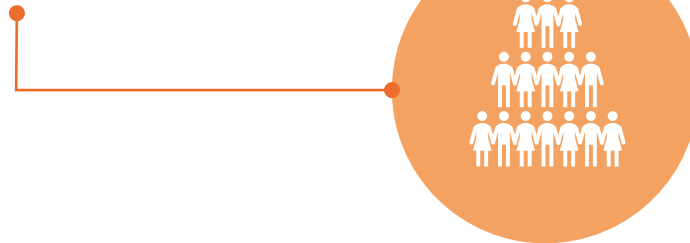
## Quantitative online research

- n=1.534
- Representative NL on age, gender and education
- Online panel from Panelinzicht



## Qualitative research using remote self-interviewing

- n=15
- Interview-tool from Fibeo



## Expertinterviews

- n=18
- Various actors from the food chain



## Deskresearch

- Literature and media
- All sources used can be requested from the researchers. They can also be found on our website [futureoffood.nl](http://futureoffood.nl)

# De 5 most important lessons from this research

1

## It is not clear for the consumer what sustainable food exactly is

Consumers do not yet have an unambiguous, clear and correct picture of what exactly is a sustainable diet. The impact of packaging is **overestimated**, while the impact of less animal products is greatly **underestimated** compared to the impact determined by experts. The wrong perception about what is sustainable, among other things, leads people to think that sustainable is always expensive.

2

## We are in the momentum for preventing food waste

Prevention of waste is high on the agenda of consumers and experts. There is currently a lot of momentum to make a step forward in this area by moving along with this momentum. Consumers are open to it.

3

## There are 4 different groups of consumers who will see sustainable food in a different way

There are four consumer groups, each with its own view on sustainable behavior. We have called them Idealists (33%), Trend Followers (19%), Blocked (26%) and Conservatives (22%). Reaching each group effectively, with the right message and the right product, requires a smart, segmented approach.

4

## Concrete arguments focused on direct advantage for consumers work best

Arguments that deliver a visible, concrete and personal benefit work better than general messages. Arguments for sustainable behavior aimed at abstract benefits that are far away from the consumer work less well. There is also little support for measures that compel consumers to eat more sustainably. This is especially the case when it comes to cutting down on meat.

5

## There is little support for technological agricultural innovation

Consumers are not (yet) thinking about improving efficiency in the context of sustainability. New agricultural technology is greeted with a dose of skepticism. Only a third of consumers think it's a good idea. Technology would make agriculture less natural, take the farmer's sandwich, produce lower quality products and be less efficient. Proponents see it as a good way to meet the growing need for food.



## 1.1 What is a sustainable diet

A sustainable menu consists of food that has the smallest possible impact on the environment while at the same time providing people with sufficient nutrients. Different products have a different impact on the planet in terms of water use, energy use in processing and transport, CO2 emissions, soil and water pollution and use of scarce resources.

A sustainable menu means that we eat more plant-based products, only consume what we really need, waste little, eat more seasonal fruit and vegetables and more local products from the Netherlands or Europe. The impact ladder below shows the impact in order, from large to small.

### Plant-based

The impact of plant-based products is many times lower than that of animal products such as meat and dairy. Within animal products, a portion of meat, then cheese and egg has the greatest effects on the planet. Of the meat products, the total impact of chicken or insects is the lowest. The impact of pork is greater and that of beef is considerably greater.

### No-waste

Use food more economically. In a sustainable menu, we eat 80% of the amount we ate in the Netherlands in 2010 per person. Now, as an end user, we are responsible for 15% of food waste. The waste is usually unnecessary, and we can easily reduce it if we handle the portion size and the pantry differently.

### Seasonal

Seasonal products require less energy to grow because fewer greenhouses are required. Seasonal products from the field are the least environmentally harmful.

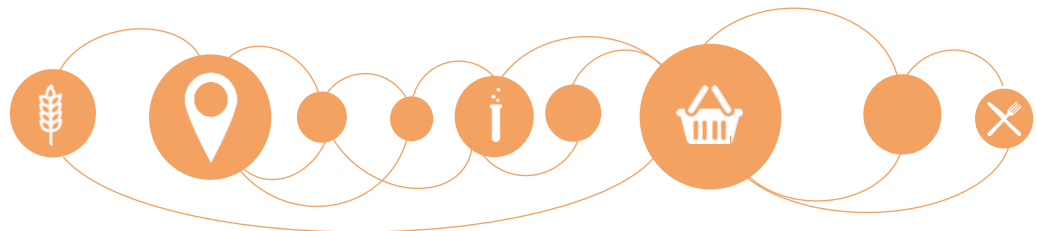
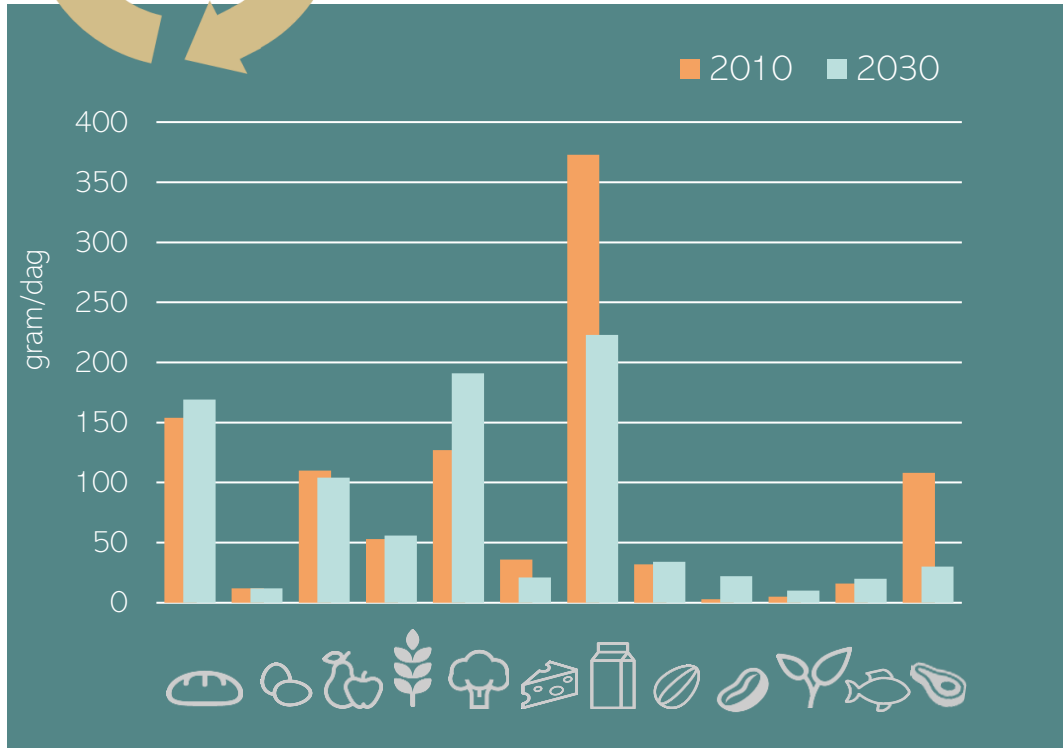
### Local

The less transport, the better. Transport can negate a significant part of the impact saved elsewhere. Think of products that are in season on other continents and transported here.

### Packaging

Although overestimated by the consumer, packaging usually has the smallest share of a product's impact

Healthy and within the capacity of the earth



A sustainable menu is created through cooperation between all links in the food chain. Only if the farmer can sell his products during the season, the factory learns to respond to changes in supply, the sales channels can handle flexibility in their range and a reasonable price is paid throughout the chain, will a sustainable, i.e. maintain system work.

A sustainable menu looks on the consumer's plate as the 'Menu van Tomorrow' (Nature & Environment in collaboration with Jumbo and Blonck consultants) indicates. The total weight of food drops from an average of 3291 grams per day to 2890 grams per day. The ratio of animal and vegetable proteins will shift in a sustainable menu from 70:30 in 2010 to 50:50 in 2030 and 40:60 in 2050. This will enable 21% of the climate targets to be achieved (Green Protein Alliance). This menu concerns vegetable products enriched with, among other things, vitamin B12, calcium and iron, substances that we now mainly obtain from animal products.

Motivation

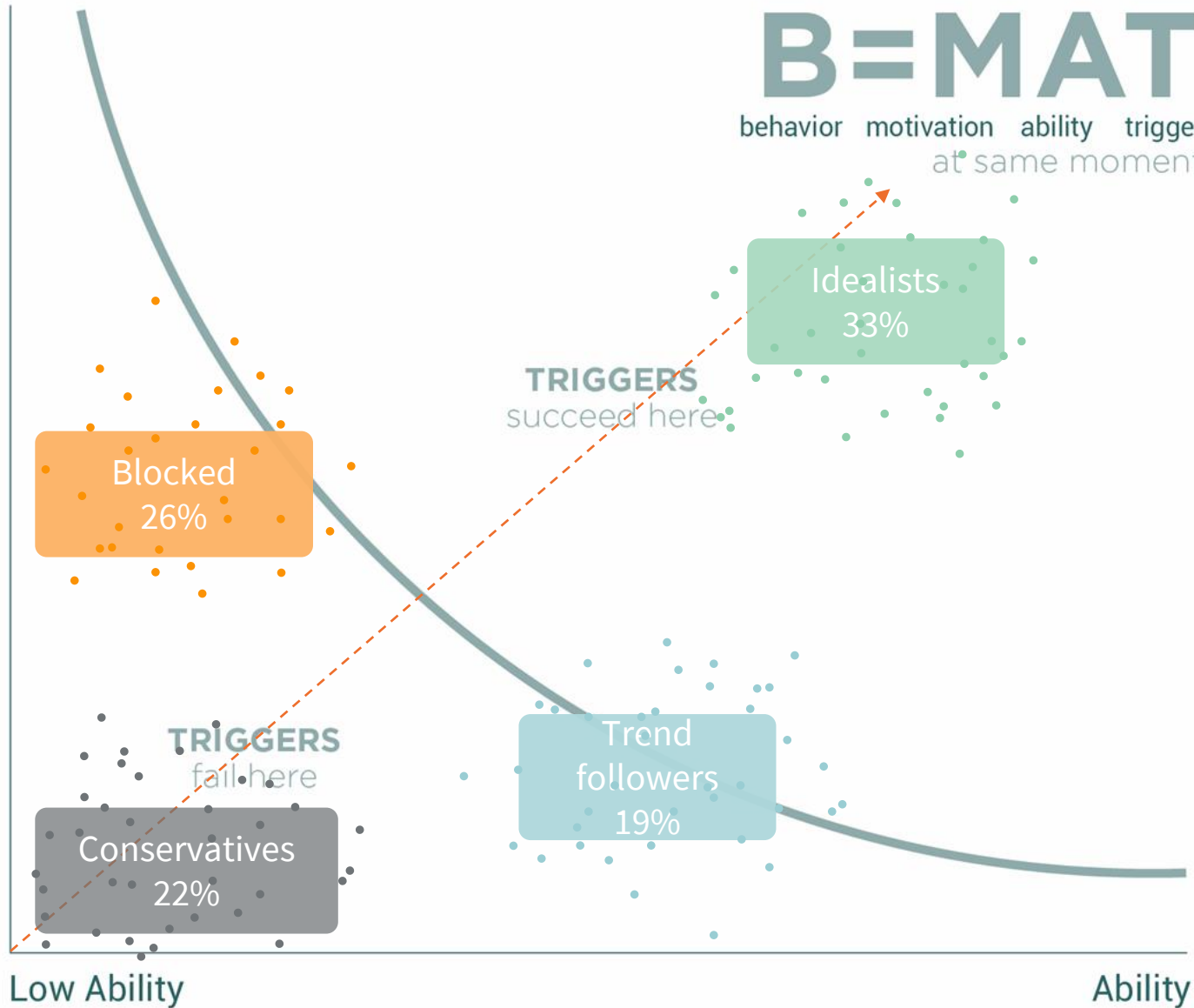
Motivation

Low Motivation

Low Ability

Ability

**B=MAT**  
 behavior motivation ability trigger  
 at same moment



*"I don't know enough about what exactly sustainable food is to really eat sustainably."*

*"I would like to make an active contribution to making the world more sustainable."*

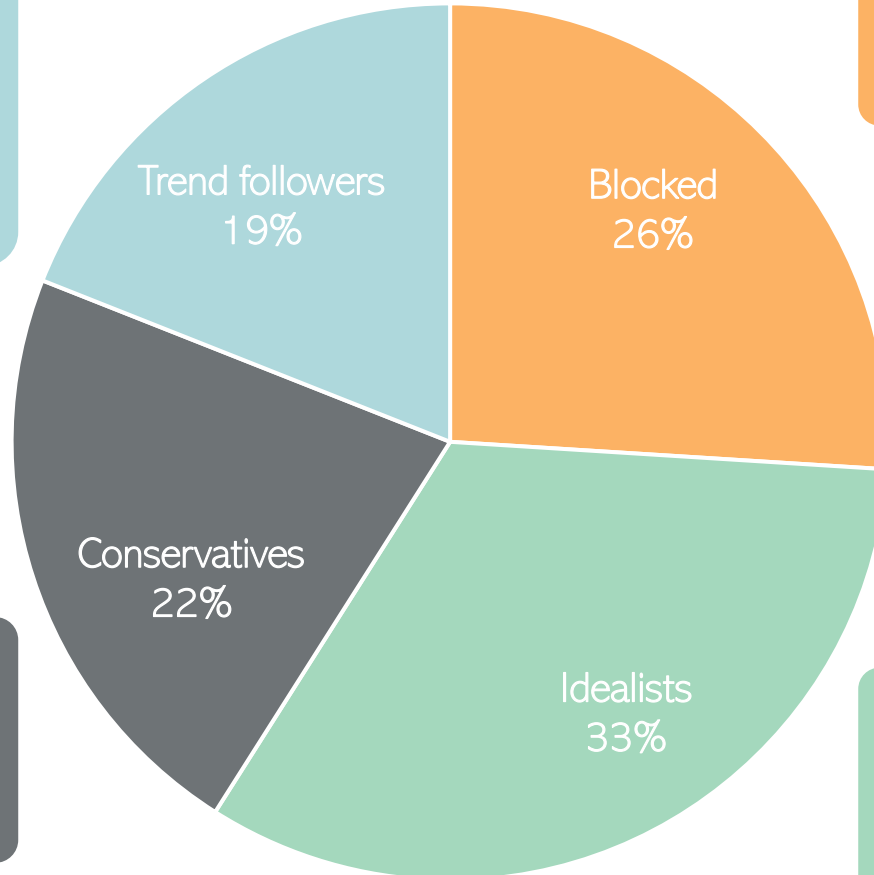
*"I think that attention given to the climate problem is excessive."*

*"I am often ahead of new trends, such as sustainable food."*



## 3.2 Distribution of the four segments

Do not see as many barriers to sustainable behaviour, but are also not motivated by the climate to behave more sustainably. Are sensitive to other arguments.



Want to behave more sustainably, but experience barriers.

The different groups hardly differ in age, income and family size.

Would like everything to remain the same. Are not convinced of the need for change and do not want change.

Are concerned about the climate and act accordingly.



## Trend followers 19%

### Attitude

- Are not interested in climate messages.
- Do not worry much about the climate, think the attention is exaggerated.
- Are little willing to adjust their consumption patterns for sustainability.
- Have a lot of confidence in quality marks such as BIO.
- Would like to be at the forefront of trends. See many people around them who have started eating more sustainably.
- They experience few barriers to sustainable consumption. For example, they do not think they know too little about what is sustainable.
- Don't think sustainable eating is more expensive.
- Are little willing to leave products for environmental reasons, if they are healthy or tasty.

### Characteristics

- More often Jumbo shoppers
- More often men
- A little younger on average
- Consider the sustainability of their behavior to be less than average
- Use meal box esand Too Good to Go relatively often
- Relatively often have young children
- Often vote Forum for Democracy

## Implications

The Trend Followers segment can hardly be set in motion to do something better for the world. They are moved by egocentric, selfish motives.

This means that this group can be encouraged to engage in sustainable behavior for reasons that benefit themselves as consumers. Make sure they get a chance to see a trend and be the first to pick it up. This can be vegan, but also health and sports related, bring your own coffee cups or minimalism for instance. This segment consists of easy-going consumers when it comes to food. Sustainable options that they (also!) offer convenience will also be popular among this group.

- Provide motivations other than sustainability. Think about health.
- Message: sustainability is hip and trendy
- Offer sustainable convenience options





# Thank you

Thank you for writing and thinking along:  
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Thank you for your contribution:  
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