Animal and Plant Protein Choices

Research Commissioned by Agriculture and Agri-food Canada

Sustainable Canadian Agricultural Partnership

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CAPI
THE CANADIAN AGRI-FOOD POLICY INSTITUTE
with
Darcie Doan Consulting
Canadian Centre for Food Integrity

Purpose and methodology

“Inform and engage with agriculture and agri-food producers about the evolving expectations and behaviours of Canadian consumers, particularly as it relates to sustainable agriculture.”

How did we identify consumer expectations and behaviours?

- **One-on-one discussions with industry experts from retail, food manufacturing, food marketing and innovation, agri-food investing.**
- **Econometric analysis of CCFI survey data 2018-2023**
- **Literature review - trend analysis and complementary surveys**

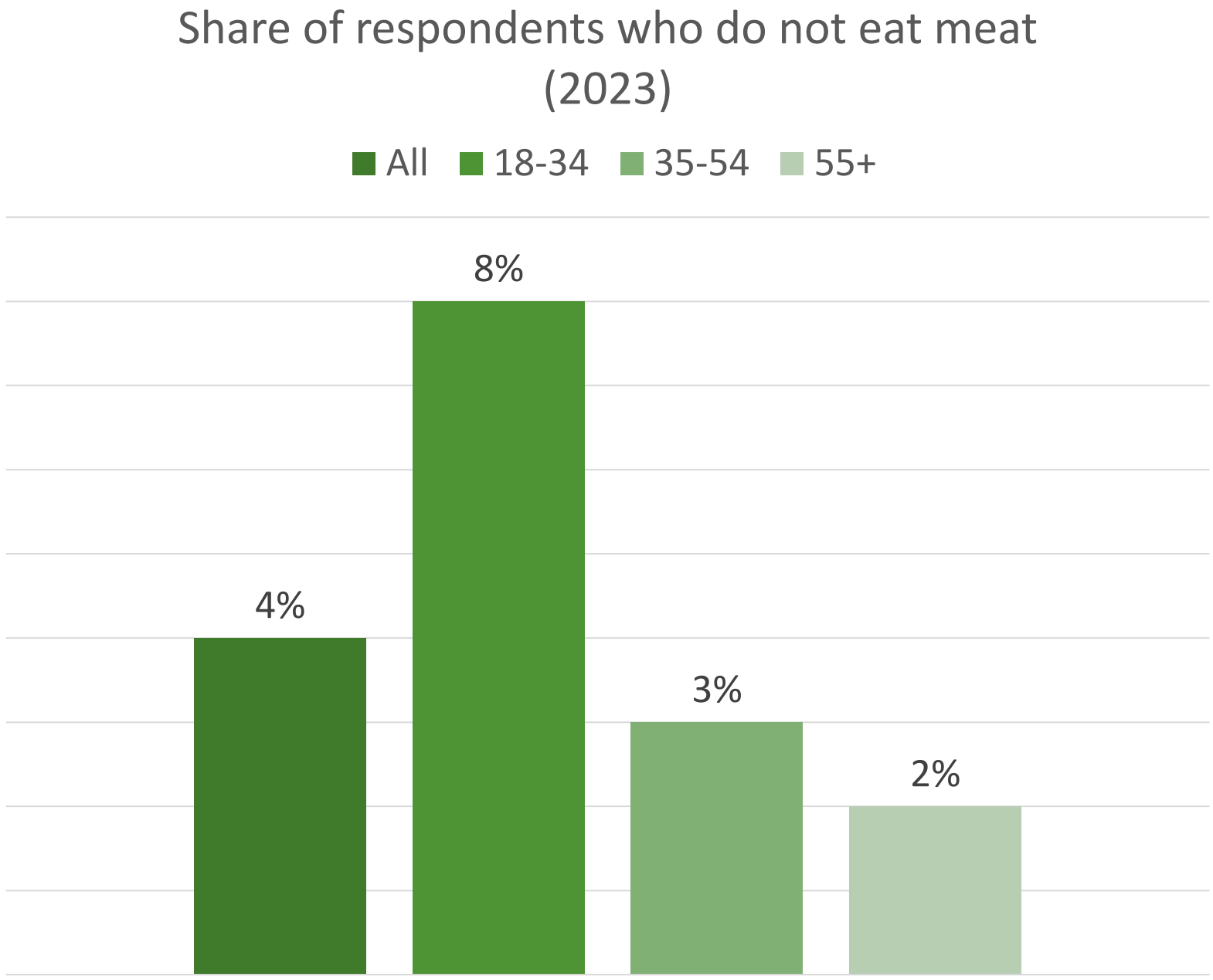
More protein, please

Meatless meat, definitely, there's a trend there. But how big it gets I have no idea. The bigger trend is protein in general. Granola bars with 12g of protein, whey protein powder. All of that business. It's beyond weightlifters now. Ensure is now bringing out protein drinks.

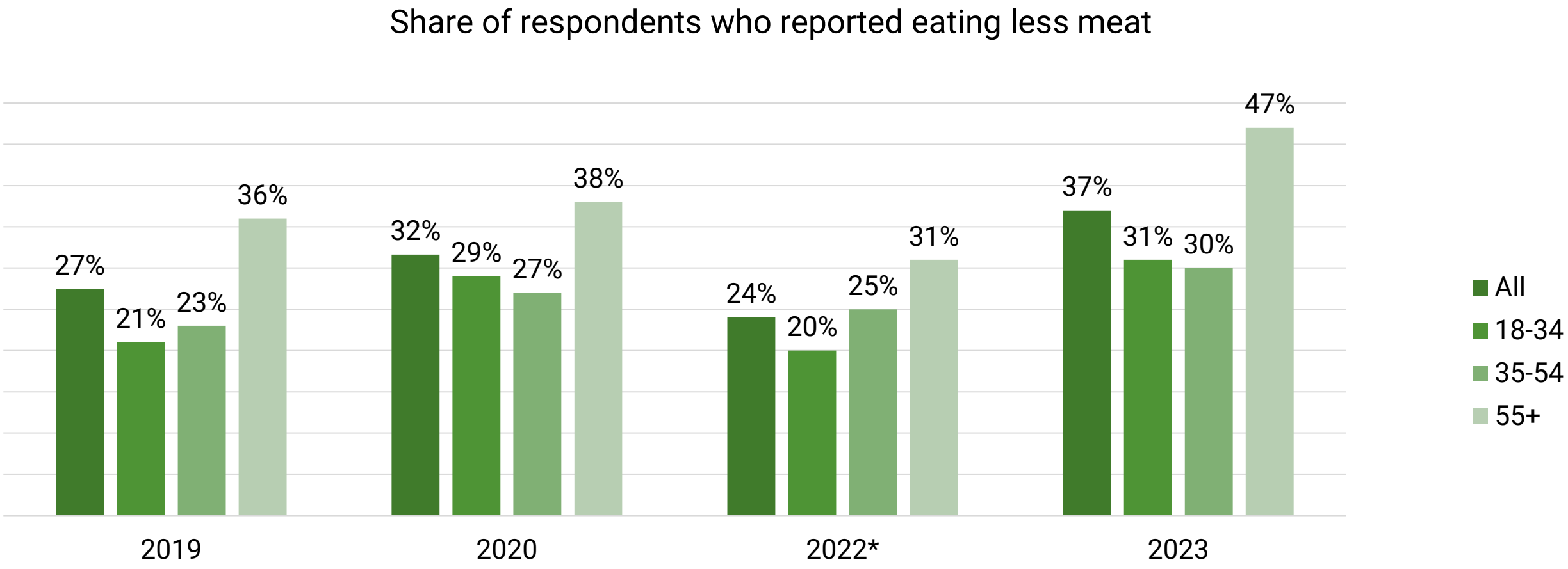
– Retail industry expert

Most Canadians eat meat regularly

Young adults most likely to be vegetarians



Canadians increasingly likely to say they are reducing meat consumption



*Ate less meat due to the cost of food.

Key Driver: Affordability

- Price/cost is the top driver for reduced meat consumption
- Meat and seafood as luxuries
- Replacement with plant protein?

Key Driver: Health

Plant proteins have the advantage

Manage aging, illness

Eat clean

Secondary Drivers: Animal Welfare and Environment

- Animal welfare/ethics more important to younger Canadians
- Animal agriculture not strongly associated with negative env impacts
- Represent risks to animal protein industries

Take-aways

- Canadian consumers have high expectations from the food system: healthy, affordable food that is sustainably produced
- Protein affordability is key
- Animal-based proteins face headwinds and must address health, animal welfare, and environmental concerns
- Significant plant-based opportunities if lack of familiarity, convenience addressed