Positioning American Lamb as a protein choice consumers can feel good about.
Widespread Adoption of Plant Based Lifestyle and Plant Based Proteins

• 15 years ago if you said “plant-based” we would all say “huh?”
  • Term didn’t exist, nor did the impossible burger
• From June 2017 to June 2018, retail sales of plant based foods jumped 20% to $3.3 billion
• The number of new U.S. food and drink products that mentioned “plant-based” grew 268 percent between 2012 and 2018
• Plant based alternatives are well funded
  • Plant-based protein alternative companies have attracted $16 billion in investment during the last 10 years
Plant Based Proteins Have Become Mainstream

• Mainstream consumers that don’t identify with any specific diet are opting to integrate plant-based meat alternatives into meals

• Plant based alternatives are getting a large footprint at grocery stores

• Restaurants are embracing plant based alternative
  • Beyond Meat at TGI Fridays
  • Impossible Burger at Burger King
  • Plant based chains popping up across the country
Plant Based Trend Drivers

- Environmental concerns and ethical benefits of plant-based meat diets are driving growth in category
- Consumers view plant-based protein as a healthier and more sustainable alternative
Plant-Based Consumers

**Flexitarians/Conscientious Meat Eaters**
- Reducing meat consumption (not eliminating)
- Eating more fruits, vegetables and healthy grains
- Cares about meat quality and how it was raised

**Vegetarians/Vegans**
- No meat/no animal products
- Meat is bad for the environment and your health
- Animal welfare concerns
Plant Based Trend Drivers

• Media Headlines
  • “Combat climate change by cutting beef and lamb.”
  • “Red meat increases risk of dying from 8 diseases.”
  • “Popularity of Impossible Foods and Beyond Meat is Saving 250,000 Animals Annually.”

• Anti-meat documentaries
  • 2008 *Food Inc.* – factory-farmed meats/questionable practices
  • 2011 *Forks over Knives* – health benefits of plant based diets
  • 2014 *Cowspiracy* (Leonardo de Caprio) – negative environmental impacts of livestock production
  • 2019 *Game Changers* (Arnold Shwartzenegger) – plant based eating (no animal proteins) improves health and athletic performance
Impossible Foods Mission

We’ve been eating meat since we lived in caves. And today, some of our most magical moments together happen around meat: Weekend barbecues. Midnight fast-food runs. Taco Tuesdays. Hot dogs at the ballpark. Those moments are special, and we never want them to end. But using animals to make meat is a prehistoric and destructive technology. Animal agriculture occupies almost half the land on earth, consumes a quarter of our freshwater and destroys our ecosystems. So we’re doing something about it: we’re making meat using plants, so that we never have to use animals again. That way, we can eat all the meat we want, for as long as we want. And save the best planet in the known universe.

Every time you choose a quarter pound of Impossible instead of a burger made from a cow, you save 75 square feet of land, 129 bottles of water, 18 miles traveled in a car.
Golden Globes Went Meatless

• Guests at the 77th annual awards show were served a completely meatless meal, in an effort to raise awareness about the impact of animal products on climate change.

• “Livestock represents less than 5% of GHG emissions in the USA. These celebrities may have flown to the awards ceremony in private jets, which would dwarf any environmental benefit from avoiding meat for one meal. Want to "fight climate change?" Start with transportation and energy and don't demonize some of the greatest foods in America!”

• Peterson Farms Bros
Environmental concerns: livestock is to blame for a lion’s share of the contributions to total GHG.

Fact: Leading scientists throughout the U.S., as well as EPA have quantified the impacts of livestock production in the U.S., which accounts for 4.2 percent of all GHG emissions, with sheep contributing .03 %.
Health Concerns

- 2015 World Health Organization red meat study
  - Red meat and processed meats raises cancer risks
- 2019 EAT-Lancet report released
  - Calling for a worldwide adoption of a reference diet that "meets nutritional requirements within planetary boundaries to minimize damage to Earth's systems" by 2050 by reducing red meat consumption by 50% and increasing fruit/vegetable/legume consumption by 100%.

FACT: Eating red meat in moderation is protective against heart attacks, strokes and cancer and provides vital nutrients. Lamb is a lean, nutrient dense protein.
Opportunities for American Lamb

• Embrace management practices that positively impact the environment, reduce GHG emissions, and increase our productivity (produce more with less)

• Nutrition benefits of real meat/American Lamb

• Share our story and balance the messages demonizing meat
Alternative Conversation: Regenerative Ag

• The solution is not fake meats produced in labs
• Livestock should not shoulder blame for the climate crisis
• Grazing animals are a crucial part of the solution
  • Through proper management systems, livestock have the potential to positively impact — even reverse — the effects of climate change
### Real Meat VS Plant Based Meat

#### Lamb
- Natural/one ingredient
- Lean, nutrient rich protein
- Rich flavor – a little goes a long way
- Tender

#### Plant Based Meats
- Highly processed, high in saturated fats
- Ok flavor, weird texture
- The Beyond Burger: pea protein isolate, expeller-pressed canola oil, refined coconut oil, water, yeast extract, maltodextrin, natural flavors, gum arabic, sunflower oil, salt, succinic acid, acetic acid, non-GMO modified food starch, cellulose from bamboo, methylcellulose, potato starch, beet juice extract (for color)
Defending our industry’s reputation

• TELL OUR STORY (Balance the messages)
  • Sheep/lamb production is historical, rich in heritage
  • Family First – we are not factories
  • Animal care
  • Grazing benefits and environmental care
  • Natural, nutrient rich protein
  • Authentic, adventurous flavor
New Storytelling Tools

VIDEO, WEBSITE AND PRINTED NARRATIVE

Show consumers why they can feel good about choosing American lamb
A Sustainable, Nutritious, Flavorful Protein Choice