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TREND REPORT



INSIGHTFUL INTERVIEW

7 questions with CEO
Turner Wyatt of Upcycled
Foods Association on
upcycling and how
businesses/products
get certified.

pg. 10



THE YEAR AHEAD

Can you guess the percent of
operators who want to improve
sustainability in the year ahead?

Hint: It's a big number!

pg. 3



SUSTAINABILITY AT HOME

Discover how sustainability
impacts consumers' at-home
food choices.

pg. 5



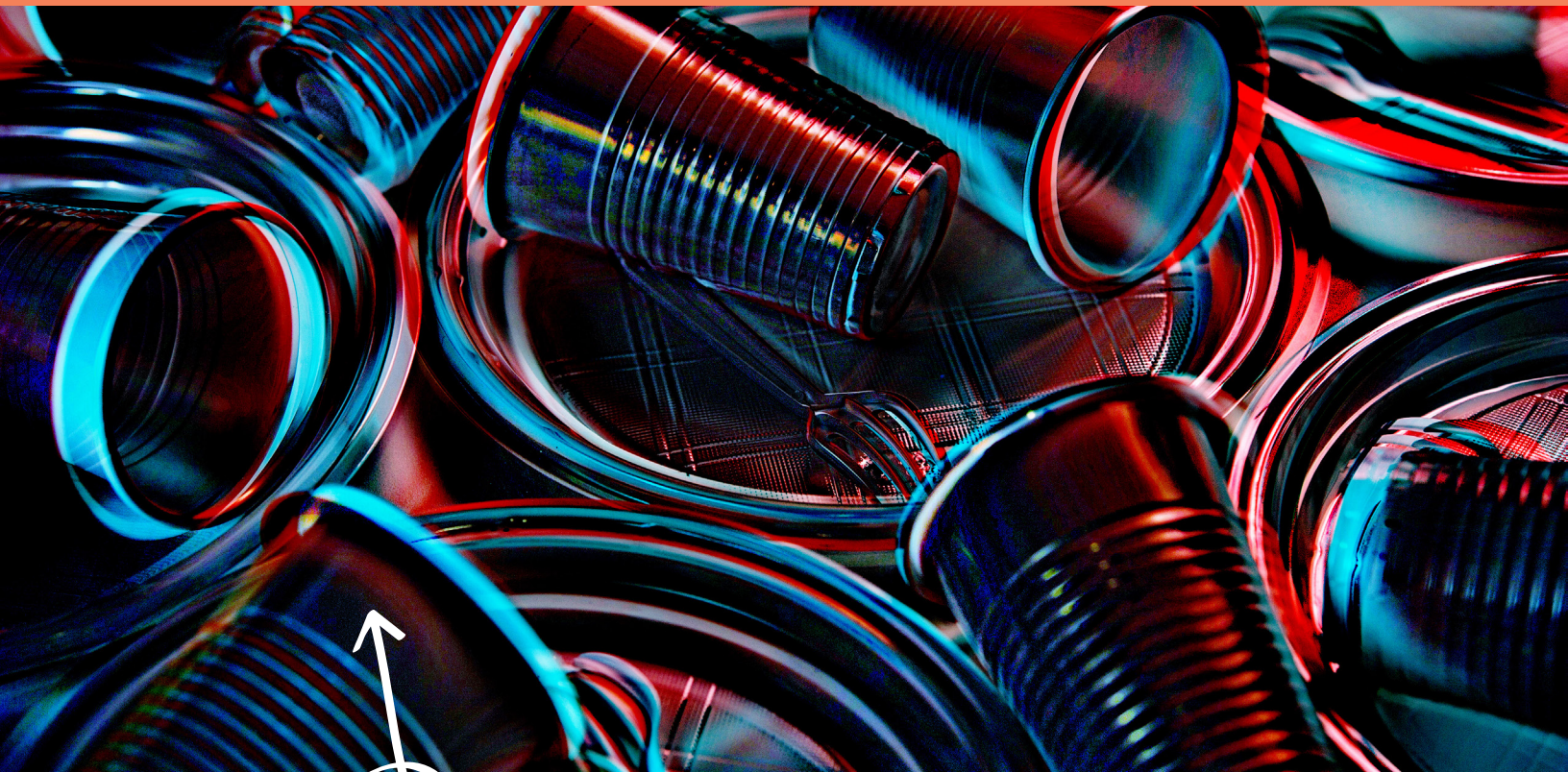
SUSTAINABILITY IN ACTION

Explore how operators and retail
brands are implementing sustainable
practices into their businesses.

pg. 8

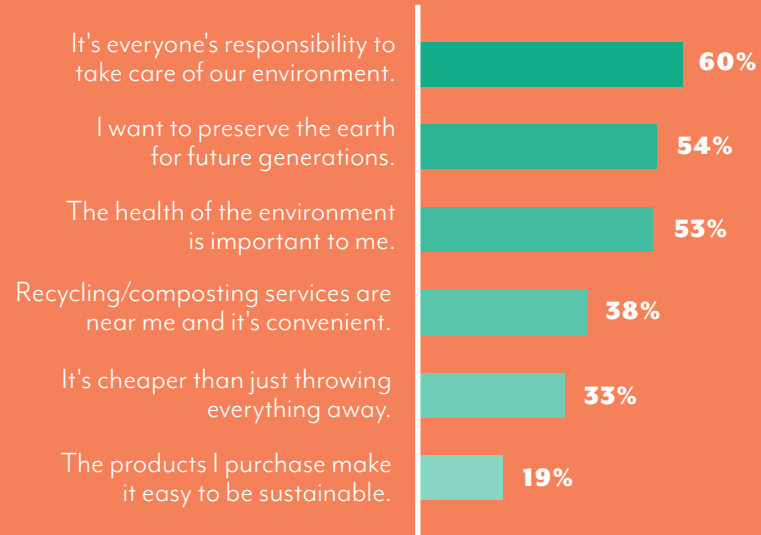
Sustain- ability in the Spotlight

Source: Sustainability Keynote Report



46% OF CONSUMERS LIMIT THEIR USE OF DISPOSABLES/ SINGLE-USE PLASTICS

Datassential asked consumers, why do you think sustainability matters? See their responses below.



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A surprising thing I learned

I was surprised to learn that nearly half of consumers are likely to use reusable cloth bags when purchasing groceries, and only 31% are likely to use disposable grocery bags, showing that there may be a decline in single-use plastic bag use at retailers on the horizon.

What are some sustainable efforts I make at home?

In addition to recycling and giving my empty egg cartons back to the farmer I purchase eggs from to reuse, I also have reusable cups I take with to coffee shops for orders instead of using a disposable cup. Instead of purchasing and throwing out cleaning products after using them, I also own reusable glass bottles that I refill with eco-friendly cleaning solutions. When grocery shopping, I opt for reusable bags or cardboard boxes (a typical way to shop Aldi), the latter of which I recycle after unloading the groceries.

Sustainability is top-of-mind for many consumers (according to Datassential's Sustainability Keynote Report, 64% of consumers say that it's important to them to make sustainable choices that limit their impact on the environment), and in recent years, operators, manufacturers, and retailers have responded to the need for more eco-friendly processes and products by reassessing not only the kinds of products they're producing but also how they're packaged and shipped.

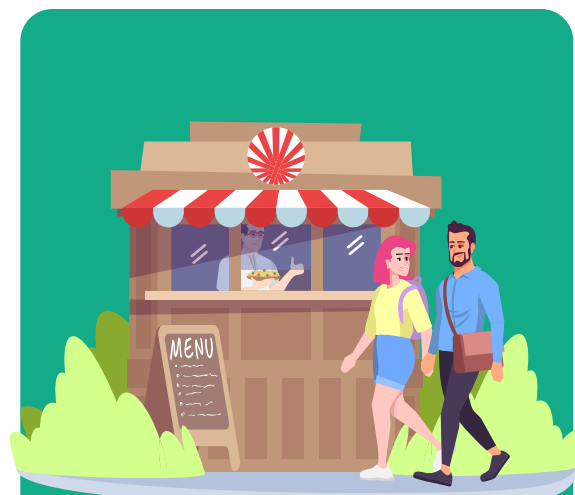
In this issue of FoodBytes, get a sneak peek at insights from our soon-to-be-released Sustainability Keynote Report, which could help inform your sustainability strategy whether you're an operator, manufacturer, or retailer. In the coming year, 45% of consumers intend on becoming more sustainable in their behaviors, according to the report, showing that this isn't just a flash-in-the-pan fad. It's a trend with legs that's only growing, but operator adoption hasn't caught up with consumer demand yet — only 35% of operators say that their operation is currently sustainable, but 70% say improving sustainability is a top priority. If you're a supplier, now is the time to look for opportunities to support operators in their sustainability initiatives.

In the pages ahead, discover examples of how operators and retail brands are capitalizing on a variety of sustainable initiatives, and not all of them mean going fully plant-based or zero waste. A complete overhaul into being zero waste can be overwhelming, so don't think too big. Consider, to start, small ways your operation could be more sustainable, and then let consumers know about those efforts through signage, menus, and social media.

Jaelyn Marks, Publications Manager

DATA DIVE SUSTAINABILITY STATS TO KNOW

Here's a sneak peek at some key insights from Datassential's soon-to-be released *Sustainability Keynote Report*, which will be available in Report Pro, including how sustainability influences consumers' at-home food choices, as well as how important it is to consumers that operators of all types make sustainable choices. If you aren't a subscriber currently, but are interested in delving deeper into the *Keynote* and Report Pro, reach out to us at hello@datassential.com.



THE BEST WAYS TO PROMOTE SUSTAINABILITY EFFORTS ARE BY CALLING THEM OUT ON MENUS AND SIGNAGE.

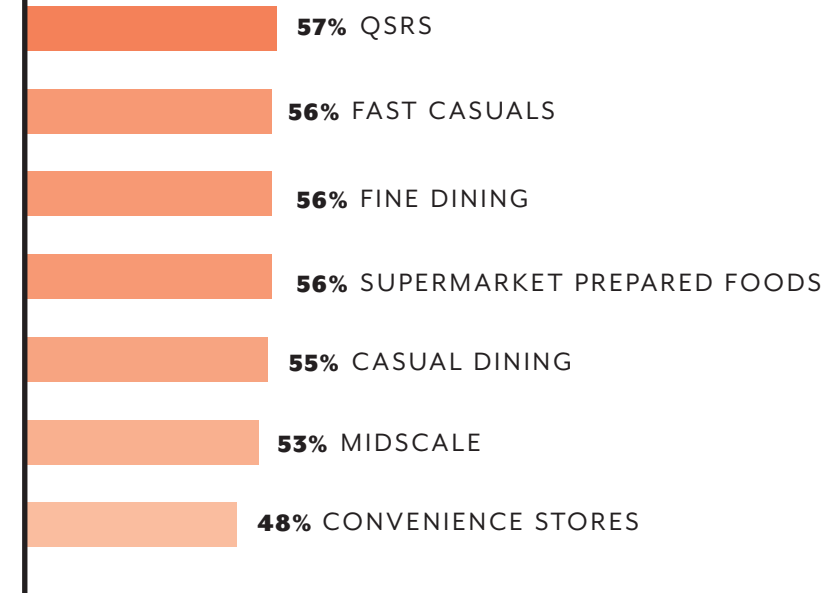


The top two ways consumers would like to learn about operators' sustainability efforts are through notes on menus (48% would like to learn about sustainable efforts through them) and signage (41%), according to Datassential's *Sustainability Keynote Report*. That doesn't correspond, however, with how operators are currently advertising their sustainability efforts: 23% of are advertising their sustainability efforts through social media, 20% through waitstaff, and 16% through signage — notably, only 14% are calling out sustainable efforts on menus, showing that there's a missed opportunity.

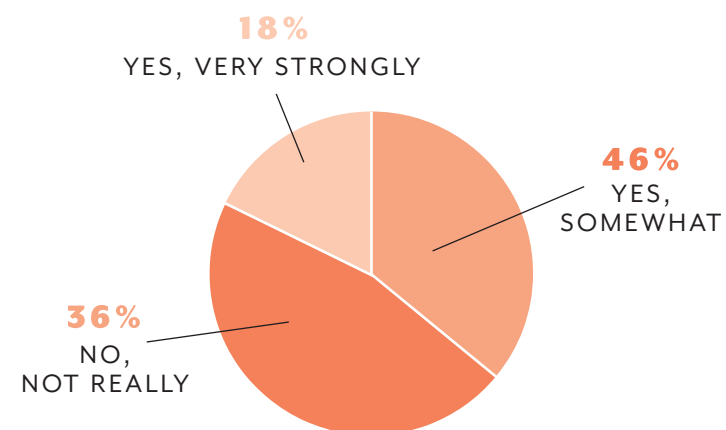
Curious what eco-friendly efforts could be called out on menus and signage, or how you can get in on the sustainability trend period? **Below are five ideas on how to get started in the realm of sustainability (don't try to jump into being zero waste from the get-go) and capitalize on it:**

1. Make sure to call out any change made towards a more sustainable alternative on menus and signage. Point out, for example, if you use compostable packaging or have ceased offering single-use, plastic straws.
2. Ask customers if they'd like to have single-use, plastic utensils included with to-go orders or not, instead of just defaulting to including them to cut back on waste.
3. Give incentives for customers to bring in reusable cups for beverage orders or reusable bags for groceries.
4. Upcycle ingredients. Instead of tossing celery leaves in the trash, for example, toss them in a salad, or consider using spent grain in pizza dough.
5. Consider implementing a recycling and/or composting program.

Datassential asked consumers: How important is it that the following types of restaurants and retail foodservice locations make sustainable choices?

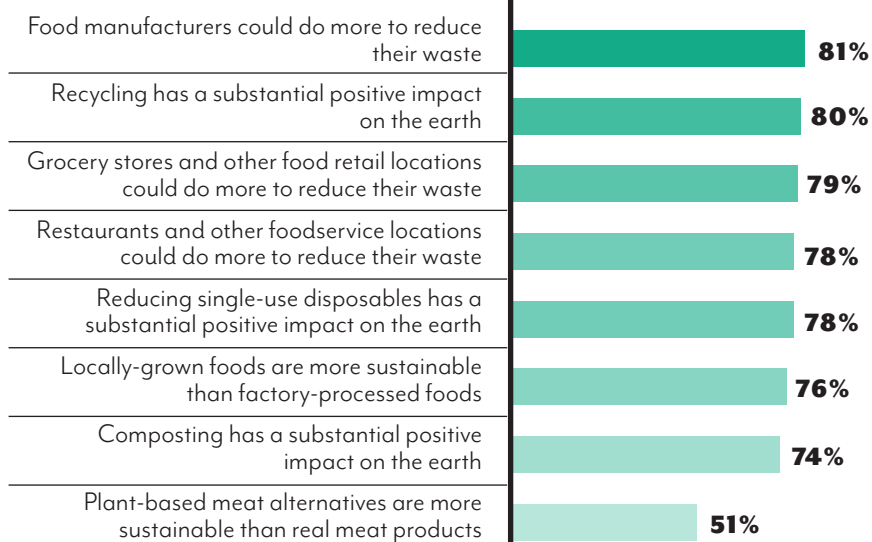


Datassential asked consumers: Does trying to be sustainable influence your food choices and what you eat AT HOME?



AT HOME

57%
OF CONSUMERS USE REUSABLE BAGS WHEN SHOPPING



Datassential asked consumers: How strongly do you agree with the following statements regarding sustainability and disposables?



When you zoom in on the different demographics, 82% of Boomers say they'd sacrifice functionality to be more environmentally friendly when it comes to disposable food products, more than any other generation.



77 PERCENT

OF CONSUMERS WOULD SACRIFICE FUNCTIONALITY TO BE MORE ENVIRONMENTALLY FRIENDLY WHEN IT COMES TO DISPOSABLE FOOD PRODUCTS

SUSTAINABLE CONCEPTS IN ACTION

There are a number of ways to put an eco-friendly foot forward. While plant-based products have been top-of-mind for years and perceived to be more eco-friendly compared to animal proteins, only about half of consumers believe plant-based products actually make a big difference when it comes to sustainability. Below, we explore how operators in the real world are putting sustainable efforts into practice, and not all have gone plant-based, showing that you don't have to eliminate meat to be

eco-friendly. Similarly, while some operators have adopted a zero-waste approach, that may not be achievable for every operator. Instead, take inspiration from the operator examples featured here and focus on the elements that are feasible for your operation to adopt, such as ways recycling could be promoted, usage of upcycled products, adoption of compostable packaging, partnerships with local farms and suppliers who promote sustainability, and more.



GET TRASHED AT SHUGGIE'S

Shuggie's Trash Pie in San Francisco specializes in serving up "trash" to customers, or to be more precise, under-utilized meat cuts (think gizzards, hearts, chicken feet, and more), ugly produce (misshapen, bruised, wilted), spent oat flour (a byproduct of making oat milk), whey, fish bycatch, and more that generally goes to waste. Shuggie's uniquely makes use of all those products mentioned above in the dishes found on their menu, and have a goal of incorporating at least one ingredient that would otherwise go to waste into every dish, although most dishes notably include more than one. Pictured above, for example, is **Shuggie's Buffalo Everything** dish featuring chicken wings roasted with chicken feet and cornmeal-fried livers and hearts tossed in Calabrian chile-buttermilk sauce, served with carrots and a salad of celery and celery leaves.



NEXT-LEVEL SUSTAINABILITY AT NEXT-LEVEL BURGER

At fast casual **Next-Level Burger** (headquartered in Bend, OR, with some locations inside Whole Foods stores), sustainability is top-of-mind and is seen in multiple aspects of how they operate. Not only is everything on their menu 100% plant-based, their to-go packaging is also fully compostable. By offering only plant-based items, *QSR* magazine reports that Next-Level Burger "saves significant amounts of water and cuts carbon emissions." Currently, Next-Level Burger is in the process of expanding its concept, with a goal to quadruple unit count by 2023.



THE FIRST ZERO-WASTE WINE BAR IN BROOKLYN, NY

Rhodora Wine Bar prides itself on being zero waste and carbon neutral. "Sustainability and respect for humans and the environment are the core tenants of the program and guide both the food and beverage choices, as well as the operations of the restaurant as a whole," reads the wine bar's mission statement. Since they're a zero waste wine bar and restaurant, that means no single-use plastics are used, and food and beverage products must have the potential to be recycled, upcycled, or composted. Showcased on the wine menu are wines that are described as "natural, low-intervention" and come from winemakers who "share a similar respect for the land and environment," while featured on the food menu are dishes like **Grilled Monkfish** (pictured above) with matcha bearnaise, turnips, and young leeks.

RETAIL SPOTLIGHT



COMPANY: RIND
PRODUCT: Kiwi Chips
WHY IT'S SUSTAINABLE:

RIND aims to reduce food waste by making dried fruit snacks like the above with the rinds and peels left on.



COMPANY: BOTH
PRODUCT: BOTH
WHY IT'S SUSTAINABLE:

BOTH "is a burger brand challenging meat-eaters to make more eco-conscious buying decisions" with their 50% grass-fed beef and 50% all-natural veggie burger (pictured above). It was featured at Expo West.



COMPANY: AWSM
PRODUCT: Classic Ketchup
WHY IT'S SUSTAINABLE:

AWSM is aiming to reduce single-use plastics and packets through their powder-based products that transform into sauces when water is added. The packaging uses 95% less plastic than traditional 16 oz. sauce bottles.

Turner Wyatt is the co-founder of four award-winning sustainable food organizations: Denver Food Rescue, Bondadosa, Fresh Food Connect, and Upcycled Food Association. He was named one of the "Top 20 Emerging Leaders" in *Food and Ag*, and earned the waste industry's 40 under 40 award. He is a Fink Fellow, and was chosen by the Mayor of Denver, CO, to serve on the City's Sustainable Food Policy Council. Turner currently serves as the CEO of Upcycled Food Association.



Q&A

Datassential: Can you give us a little background on the Upcycled Food Association and how it got started?

Wyatt: The Upcycled Food Association was created through a collaborative effort by a group of businesses that all shared the mission of reducing food waste by growing the market for upcycled food projects. In less than 3 years, the UFA Member Network has grown to more than 220 companies across 20 countries. Together, we envision an upcycled product in every aisle of every grocery store, allowing everyday consumers to prevent food waste with the products they buy.

Today, our Membership Program connects companies and organizations with surplus ingredients and byproducts, fostering relationships and optimizing the supply chain. Our flagship third party-verified certification program, Upcycled Certified, allows companies to certify their products and ingredients and showcase their commitment to upcycling to consumers, restaurants, and retailers.

D: How do you define sustainability?

W: **When you plant a seed, you get thousands of seeds in return. So nature is even better than sustainable; it's regenerative. Why doesn't the food system act more like food itself? I define sustainability as acting in a way where if everyone else on the planet acted the same way, the planet and all its inhabitants would still be healthy 100 years from now.**

Additionally, we must acknowledge that we are accountable to the lasting impact our choices have on the environment in the present and future. We believe the future will be better if there are many more upcycled products in it. We believe this because the approximately 250 products that have so far been Upcycled Certified are collectively preventing more than 920 million pounds of food waste per year!

D: How does upcycling tie into sustainability?

W: Upcycling prevents food waste by creating new products out of otherwise wasted food. Think of making bread out of spent grain, a byproduct of beer brewing, or creating a salty chip out of the pulp from juicing vegetables. According to Project Drawdown, preventing food waste is the single most effective solution to global warming. Upcycling is all about using our resources more efficiently, and innovating on ingredients that were previously overlooked. By doing this, we're able to help reduce waste, prevent deforestation, and continue to minimize our carbon footprint.

D: Are there any particular products or categories that lend themselves especially well to upcycling, or have a lot of food waste that presents an opportunity?

W: There are lots of areas that provide opportunities for upcycling. For example, cacao fruit from cacao production for chocolate is used to create cacao water or cacao flour. Cascara from coffee production can go into beverages. What is great about upcycling is how it encourages experimentation, which means there's always a new upcycled product right around the corner.

D: Are there items that are assumed to go to waste, but in reality, go into animal feed or compost or something else?

W: According to the definition of "upcycled food" developed by UFA, Harvard Law School, and others in 2020, upcycled foods have to prevent food from going to a food waste

destination, and have a positive impact on the environment. We ascribe to the definition of "food waste destination" from the World Resources Institute, which includes landfill, compost, and animal feed. Upcycling is all about elevating food to its highest value and best use. In many cases, that means elevating it to food for human consumption. But there are upcycled products in almost every category. From pet food to cosmetics to dietary supplements, consumers will soon find upcycled products in every aisle.

D: How do products earn an Upcycled Certified certification?

W: Any product that wants to be Upcycled Certified connects with UFA and goes through a rigorous third-party audit that ensures there is a meaningful prevention of food waste associated with the product. Products can gain certification by including more than 10% of upcycled ingredients by weight, or by meeting the food waste prevention tonnage threshold. The average timeline from application to certification is three months.

D: How many companies and products currently have an Upcycled Certified certification?

W: UFA currently has 220 certified products, 46 certified companies, and 63 B2B ingredients. As a food company, it's easy to participate in the upcycling movement by utilizing an upcycled ingredient already on the market.

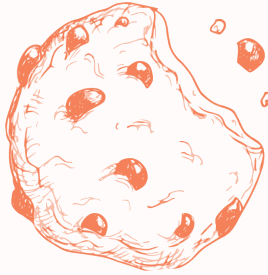
This interview has been edited for space and content.

But there's an opportunity for even more to capitalize on upcycled options, as an additional 34% of operators are interested in featuring them. Discover the percentage of consumers who would be willing to pay more for upcycled products in our full Sustainability Keynote Report.



20 PERCENT

OF OPERATORS FEATURE DISHES THAT INCLUDE UPCYCLED INGREDIENTS



A FEW FINAL TREND BITES

Sustainability is something more and more operators, manufacturers, and retailers of all sizes are looking into and taking more seriously as time goes on. It's not a flash-in-the-pan trend. In this issue of *FoodBytes*, we gave you just a taste of the insights you'll find in our full *Sustainability Keynote Report* that's coming soon to Report Pro. Reach out to us at hello@datassential.com if you're interested in learning how you can gain access.

3 WAYS TO TAKE ACTION ON SUSTAINABILITY TRENDS

- **Consider small changes you could make to be more sustainability-forward.** Maybe that means offering incentives for customers to bring in their own coffee cups for orders or reusable grocery bags to shop, switching to compostable packaging, introducing recycling, or donating leftover food.
- **Look for opportunities to upcycle ingredients.** Think hard before tossing ingredients like spent grain, whey, celery leaves, or bruised fruits/veggies in the trash. Instead, look for opportunities to upcycle these ingredients by featuring them in a salad, for example, a smoothie, pizza dough, etc.
- **Highlight sustainable efforts on signage and menus.** Don't let your efforts slip by under the radar. Shine a spotlight on them so consumers who are looking to make more sustainable choices when eating at home or dining out know what your operation does for the environment.

RELATED REPORTS



FIVE IN FOCUS: CLIMATE CHANGE & SUSTAINABILITY



INTERNATIONAL CONCEPTS: SUSTAINABILITY



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KEY QUOTE:

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-Turner Wyatt, CEO of the Upcycled Food Association

WHAT'S COMING UP NEXT MONTH?

Get ready to be surprised in our next issue of *FoodBytes* by the strange and unusual LTOs we uncover. We dive deep into the most unique items to be released by top chains in SCORES from the past year, as well as reveal how anyone can lean on unexpected pairings, flavors, and formats to add interest to well-known items and stand out.



HUNGRY FOR MORE TRENDS? Check out last month's Report Pro releases!



Keynote Report: Sauces, Condiments, and Dressings
Dive deep into all things sauces, condiments, and dressings in this Keynote Report.

Sauces, condiments, and dressings are essential flavor agents and often the catalyst for innovation. Learn more about how both consumers and operators buy and think about sauces, condiments, and dressings, from flavor profiles and packaging to brands and signature items.



CC: Next-Gen BBQ
What does the next generation of BBQ look like in the States?

In this issue of *Creative Concepts*, discover what's new in BBQ. Get a breakdown of regional BBQ styles and consumer preferences, and explore how the next generation of BBQ is fueled by global styles and ingredients.




IC: Glaobl LTOs to Know
Need to up your LTO game? Look no further than this issue of International Concepts for inspiration.

This issue showcases a world of global LTOs ranging from cherry blossom tacos to strawberry chocolate Christmas beverages. Plus, don't miss a Frappuccino face-off and say boo to a variety of spooky specials for Halloween.




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