**Scoping opportunities for red meat in emerging diets**

**V.RMH.0058 - Terms of Reference TOR**

This TOR document is seeking proposals from suitably qualified and experienced providers in the field of nutrition, health, anthropology, sociology and human behaviour. As this project forms part of a broader suite of initiatives aimed at equipping wider Australian red meat industry with tools needed to instigate innovative developments in order to increase value-addition to the red meat industry, providers should be able to clearly provide directives on *potential industry opportunities* by exploring *emerging dietary patterns, fads and food product trends* in a relatable format to a broad range of stakeholders (e.g. operations, research and development, business and strategic marketing). A clear output from the project will be to focus and conclude with specific recommendations for how the red meat sector could look to capture high value opportunity from these trends with the aim for project outputs to lead directly into investable opportunities to explore with industry partners. (that is, we do not simply want a generic reinstatement of the trends).

**Background**

The Australian red meat industry is currently highly reliant on commodity-based products. However in order to stay competitive, the red meat industry needs to capture value-addition by diversifying product range and red meat offerings beyond the current commodity-based range. MLA has identified a range of growth opportunities to value-add and drive innovation in the red meat sector. In order to support MLA’s initiatives to grow red meat demand and capability in consumer and market insights, in-depth assessment of specific emerging trends and markets needs to be undertaken. While MLA is involved in constantly keeping up with current nutritional research on the health role of red meat in the diet and providing evidence based resources for health professionals (Pillar 1 – Meat Industry Strategic Plan), assessing dietary evolution patterns and identifying the influencing factors is broader than just a health application. Dietary intakes have evolved in line with societal evolution. Dietary patterns today are different to intakes from 20 or 30 years ago (Shewfelt et al., 2016). Many factors affect the range of foods available to consumers. Certain foods that were a childhood staple for one generation have altogether disappeared while others have emerged to cater for values, needs, wants, desires that are constantly metamorphosing. Technological advancements mirror evolutionary patterns. In order for MLA to know “how” to respond, it is fundamental to first identify the underlying influential factors that drive dietary trends/fads. In doing so we will be able to understand and plan accordingly for the emerging dietary patterns and potential high value growth (red meat based) opportunity spaces.

**Scope: The Influencers (who) and the Emerging Dietary Patterns Scope**

International travel has introduced consumers to new cultures, foods, flavours, textures and cuisines. Globalisation is allowing seasonal produce to be consumed all year round. Medical science is moving into previously unchartered areas of genomics, DNA and microbiota interactions. However, what/who is it that drives consumers to adopt particular dietary behaviours? What are the influential factors that affect consumer choices?

Across all food and non-food sectors, decisions are made based on emotions and feelings. Needs may be perceived based on internal triggers (e.g. family history, personal experience) or external stimuli (e.g. external information provided or sought out). Information and the sources of such information can affect consumer behaviour. Celebrities are no longer just actors and musicians but now include doctors (e.g. Dr. Oz), chefs (e.g. Pete Evans), personal trainers (e.g. Michelle Bridges), YouTubers (e.g. *iiSuperwomanii* Lily Singh), instagramers (e.g. Liz Eswein @newyorkcity) and bloggers (e.g. Karina from cafedelites.com) with the ability to influence decisions ranging from make-up and handbag choices to café preference, political values, holiday destinations and dietary intake (and ultimately red meat usages and occasions). Information does not need to be sought out, nor does it need to be scientifically sound for consumers to accept. It needs to be easy to understand, fast, convenient, and promise something. The *Internet of Things* is allowing consumers access to a plethora of resources (both scientifically sound and quackery). It also allows consumers to be part of a virtual network, a family, a tribe across time zones, continents. This cultural evolution affects all aspects of societal development, most notably food – therefore, insights to identify opportunity spaces for Australian red meat industry is being sought.

It is said that food is no longer just a source of sustenance with some suggestions dietary intake is a direct reflection of values and morals. That is, what we eat is an indication of what we belong to, hold fast to, stand for, and believe in. The rise of the paleo, gluten-free, raw and alkalizing diets are a perfect example of this. They purport to represent more than “what our ancestors ate” with diets said to “prevent inflammation”, or free from “over processing so as not to destroy enzymes” or “avoid too much acid in the body to reduce inflammation”. These diets represent a way of life, a fixation of health, and/or environmental sustainability and greenhouse gas emission awareness, *my-body-is-a-temple* thinking, but from different angles. They appeal to different target groups and requires now a broader understanding to identify ermeging opportunities for Australian red meat industry

**The Benefits**

The rise of various emerging dietary trends can provide insight into where society is heading and why. As more information (either scientific or opinion based) becomes available, dietary patterns will evolve to reflect such changes. However understanding what/who the underlying influencers are is also critical to the red meat industry adjusting to evolutionary behaviours. Not only will this information assist MLA to provide accurate resources and commission research to build evidence supporting the Australian Dietary Guideline recommendations but it may also be used to influence the influencers while identifying emerging growth opportunities that the industry can invest in.

Potential topics that may be covered within a detailed scoping report could include (but is not limited to):

* The evolution of consumer dietary behaviour
* Where are they now? The highs, lows and extinctions of food products
* Consumer information sources and resources
* Food modes of access
* The rise of usage, occasion and food pairings (red meat inclusion opportunities)

**Research Activities**

The following activities are anticipated (but submissions may identify additional activities). Submissions that address all or specific components of this TOR will be considered. Once the successful tender(s) is/ are accepted a consultancy agreement listing the tasks, outcomesand timeframes will be agreed.

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| **Task** | **Proposed Date** |
| 1. Present an outline on the approach to be used to collate the information. Include a draft template example for a potential module. Include in your submission the development time for completion of the ensuing module topics.  | 28-Feb-17 |
| 2. Proposal received, reviewed and feedback provided by MLA | 3-Mar-17 |
| 3. If agreed, standard MLA terms and conditions consultancy agreement sent to consultant and once executed work to commence | 17-Mar-17 |
| 4. Interim progress report/workshop – consultant to present to MLA 2 x completed modules to confirm on track progress. Up to 20% budget payment to be made to consultant on successful delivery | 30-Apr-17 |
| 5. Final report and recommended opportunity spaces identified and next steps plan for investable innovation submitted to MLA. | 1-June-17 |

**Project Budget -** Maximum project budget is A$40,000.

**Proposals**

Solution providers/consultants are invited to submit proposals which outline:

* Capabilities, skills and experience of proposed team in food science, nutrition, with particular expertise in preventative health, bioactives, functional nutrition, bioaccessibility and bioavailability and food marketing and customer segmentation as relevant to this project scope;
* Demonstrated in-depth knowledge of application to practical uptake by cross-disciplinary industry(ies);
* Experience in technology and science communication translation to broad audiences
* Proposed approach to addressing all or parts of the terms of reference and method of delivery to achieve the objectives
* Project timeline of activities and achievements, including major stages and milestones.
* Indicative project budget for each component being addressed and identification and time/rate of personnel working on the project
* Commercialisation plan for next steps (including if desired, Meat & Livestock Australia Donor Company (MDC) co-investment partnership with identified partner(s).

**Key contact for MLA**

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 SHEWFELT, R. L., ORTA-RAMIREZ, A. & CLARKE, D. A. 2016. *Introducing Food Science,* Florida, USA, Taylor & Francis Group.